Aloha Table Service

v6.4

Report Guide

Copyright

Table of Contents

v6.4

Index

Introduction

Welcome to the Aloha TableService Report Guide, a comprehensive analysis of the reporting features provided by the Aloha system. You will learn the benefits of each report, each available calculation, and see selected examples to help you further understand the vast reporting capabilities.

Reports are essential in a business. They gauge the progress of your restaurant and determine your success or failure. In a corporation, reports provide an important link from the store level to corporate. Some data involves specific calculations to increase profitability or to show comparisons. These comparisons could be between employees, selected days, or both.

Reporting data is a compilation of transactions which employees ring and close from the Front-of-House (FOH) terminals. As the day progresses, you can view up to the minute data with the FOH reports. Some reports also print to the local receipt printer. This data is usually not complete because there may be outstanding checks or incorrect payments, therefore, never report important information from the FOH reports. You can view sales, labor, and performance measure information.

At the close of business, or during the system End-of-Day (EOD), the system compiles the data for the Back-of-House (BOH) reports. You can run, view, and print the BOH reports to a designated printer. The Aloha system has a wide variety of reports available to you, such as the Hourly Sales and Labor report, Sales by Revenue Center report, Labor report, Product Mix report, and more. In most operations, the Weekly or Summary Sales report is the most important report to you, and is used in accounting.

How This Guide is Organized

This guide is designed to help you familiarize yourself quickly with the Aloha TableService reports. It is organized as follows:

Chapter 1: Configuring Your Reports

This chapter discusses the available settings used to configure and alter your reporting capabilities for the FOH and BOH reports, such as what to include in the gross sales figure. Also, here you define the time interval necessary for some reports, for labor and sales reporting.

Chapter 2: Analyzing Your FOH Reports

This chapter discusses the FOH reports, which provide you with up to the minute reporting data from the FOH terminals. Some reports display on screen, and some you can print.

Chapter 3: Analyzing Your BOH Reports

This chapter discusses the BOH reports, which enable you to operate a successful business. The chapter provides information about how to limit and sort the information that goes into your reports, and how to print reports before or after previewing them in the system.

Index

Conventions Used in This Guide

Numerous graphics and instructions appear throughout this guide. These conventions make it easy to find and understand information.

Symbols and Alerts

The following graphic symbols alert you to important points throughout this guide:

Highlights a special point of interest about the topic under discussion.

Alerts you that the operation being described can cause problems if you are not careful.

Directs you to a more complete discussion in another chapter of the current book, or other reference material.

Points to a useful hint that may save you time or trouble.

Configuring Your Reports

This chapter discusses the reporting features within the Aloha system that enable you to alter certain reports, define reporting time intervals, assign employees the ability to review reports, and more.

Chapter 1

In this chapter you learn how to configure certain aspects of the FOH and BOH reports, such as what to include in sales calculations, and defining time intervals for reporting data.

We discuss the following areas in the Aloha system:

- Clock In/Out tab for the Labor group in the Store Settings function.
- Reports tab for the Financials group in the Store Settings function.
- Reports tab for the Printing group in the Store Settings function.
- Reports tab for the Access Levels function.

Refer to the Aloha TableService Reference Guide for more information on the tabs in the Aloha system.

Configuring Reports to Display Fractional Guest Counts

When you determine your guest count based on the number of items ordered from a specific category, such as entrees, the system takes the weight you define for your items in the specified category into consideration. For example, if you give an item in the guest count category a weight of '2,' the guest count increases by two each time a guest orders the item. Prior to v6.2.13, you could define the weight of an item using whole numbers only. Beginning with v6.2.13, you can define the weight for an item using a fractional value, such as 0.25. The fractional value rounds to the nearest whole number, and does not carry over to a separate guest check.

SCENARIO: A restaurant enables the 'Use Entrees for Guest Counts' feature and includes large-sized appetizers that guests sometimes order as a meal, such as Super Nachos, in the guest count category; however, each time a guest orders Super Nachos to share with the table, the guest count becomes over-inflated because the weight for the Super Nachos item cannot be less than 1.0. To receive a more accurate guest count, the restaurant assigns a fractional weight of 0.25 to Super Nachos. When a party orders two Super Nachos, the total weight is 0.50, so the system rounds the guest count to one. When a second party orders one Super Nachos, the total weight is 0.25, so the guest count does not increase. It is important to note that the guest count for this scenario is based on one guest check for the party. If each guest orders Super Nachos, but wants a separate check, the guest count does not increase.

Select Maintenance > Store Settings > Order Entry group > Guest Counts tab. In this section, we discuss only the options related to reports.

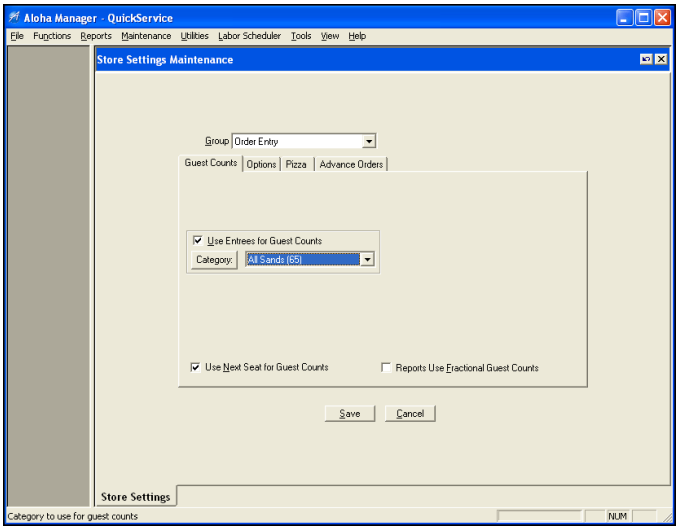
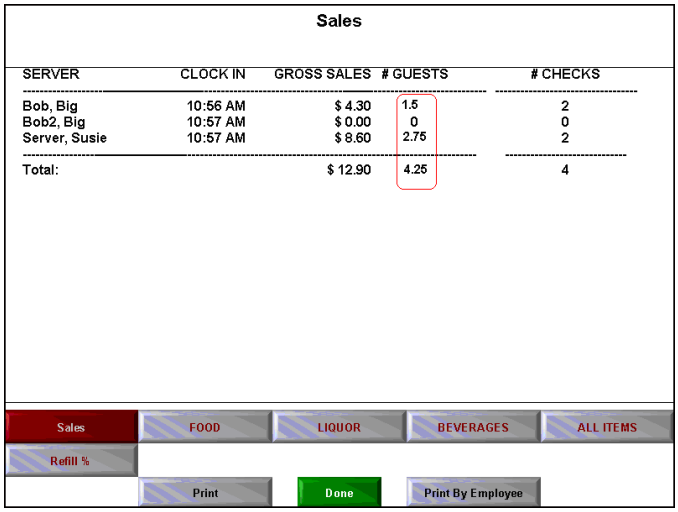


Figure 1-1 Store Settings - Order Entry Group - Guest Counts Tab

Reports Use Fractional Guest Counts — Displays guest count values with two decimal places on the following reports: FOH Server Sales report, FOH Flash report, BOH Server Sales report, BOH Sales by Revenue Center report, and the BOH Summary and Weekly Sales reports. The guest count values display with decimal places only when an item defined as a fractional guest count weight is sold. ***Required Options: 1)*** To define items with a guest count weight, enter a whole or fractional value in the 'Guest Count Weight' text box in Maintenance > Menu > Items > Item tab. ***2)*** You must select 'Use Entrees for Guest Counts' in Maintenance > Store Settings > Order Entry group > Guest Counts tab to use fractional guest counts.

When you view or print a report that contains guest counts, the values that contain a fractional value appear with two decimal places, with an ending total. A guest count value that does not

include an item defined as a fractional guest count weight, or rounds up to the nearest whole number, displays on the reports as normal.



Sales

SERVER	CLOCK IN	GROSS SALES	# GUESTS	# CHECKS
Bob, Big	10:56 AM	$ 4.30	1.5	2
Bob2, Big	10:57 AM	$ 0.00	0	0
Server, Susie	10:57 AM	$ 8.60	2.75	2
Total:		$ 12.90	4.25	4

Sales | FOOD | LIQUOR | BEVERAGES | ALL ITEMS

Refill %

Print | Done | Print By Employee

Figure 1-2 FOH Server Sales Report

Guest counts appear on the following reports:

- FOH Flash report
- FOH Server Sales report (shown)
- BOH Server Sales report
- BOH Sales by Revenue Center report
- BOH Summary Sales report
- BOH Weekly Sales report

Configuring the Clock In/Out Tab for the Labor Group

This tab enables you to set labor reporting options, overtime calculations, and clock in/out rounding. In this section, we only discuss the options related to reporting. Select Maintenance > Store Settings > Labor group > Clock In/Out to display the Clock In/Out tab.

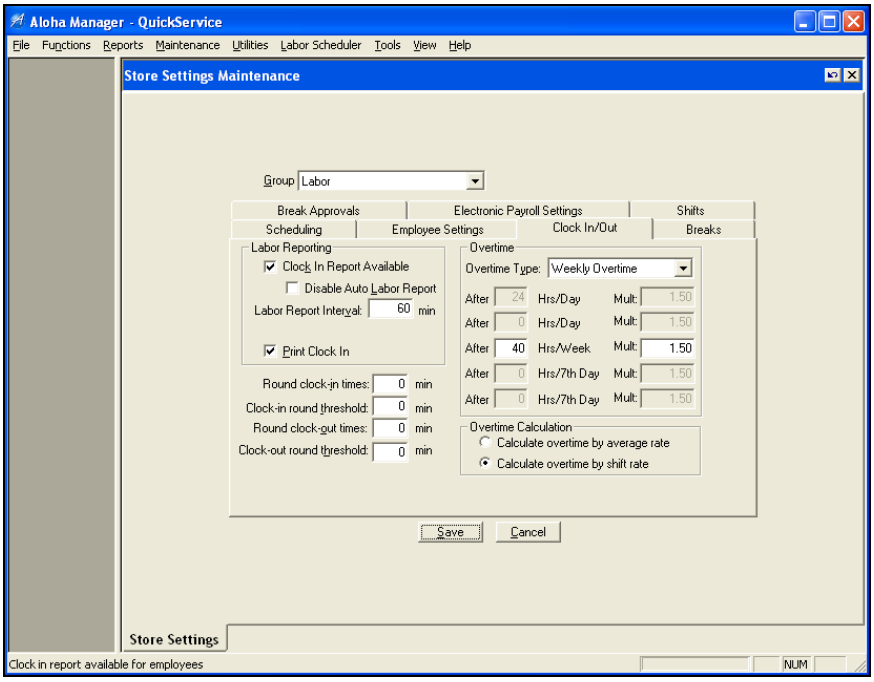


Figure 1-3 TableService Store Settings - Labor Group - Clock In/Out Tab

Labor Reporting Group Box

The Labor Reporting group box enables you to define requirements related to labor reporting.

Clock-In Report Available — Enables employees to access the Employees on the Clock button on the FOH Reports screen. ***Required Option:*** You must also select 'Labor and Clock Reports' in Maintenance > Labor > Access Levels > Reports tab and assign the access level to the employee.

Disable Labor Reporting — Disables the printing of the clock-in and clock-out chits. Also, labor figures are not included in the Restaurant Sales report for the FOH. This option is used primarily for international operations.

Labor Report Interval — Denotes the time interval (in minutes) used for calculating the FOH Labor Report. Labor costs are reported in increments of this interval.

Print Clock In — Prints the clock-in chit for each employee. ***Related Option:*** To disable printing of the clock-in chit, select 'Disable Labor Reporting.'

Configuring the Reports Tab for the Financials Group

This tab enables you to include comps and promos in net sales, exclude open sales on the net server report, and more. Select Maintenance > Store Settings > Financials group > Reports to display the Reports tab. In this section we discuss only the options related to reports.

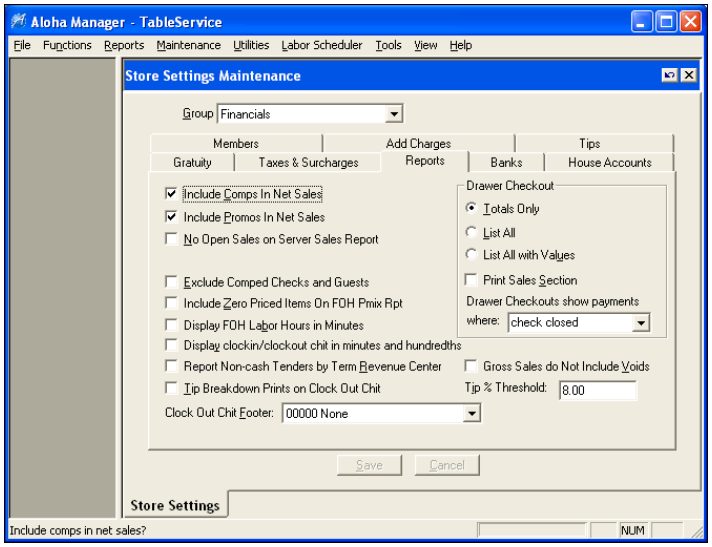


Figure 1-4 TableService Store Settings > Financials Group - Reports Tab

Include Comps In Net Sales — Includes comp sales in the net sales amount.

Include Promos In Net Sales — Includes promo sales in the net sales amount.

No Open Sales on Server Sales Report — Only includes sales from closed checks on the Server Sales report.

Exclude Comped Checks and Guests — Does not include checks in which a comp took the amount to $0.00, when calculating check and guest counts totals.

Include Zero Priced Items On FOH Pmix Rpt — Does not include items with a $0.00 price on the FOH Product Mix report.

Display FOH Labor Hours in Minutes — Controls display of hours and minutes on FOH reports for Clock In/Out Times and the Labor report. If cleared, the hours display in a decimal, or hundredths, format.

Display clock in/clock out chit in minutes and hundredths — Controls display of hours and minutes on the clock in/clock out chit. If cleared, the times display in hours and minutes, or HH:MM. If selected, times and totals print in the HH:MM format *and* in hundredths, or decimals.

Report Non-cash Tenders by Term Revenue Center — Always reports non-cash payments to revenue centers attached to the terminal, even if you have attached a revenue center by an order mode or by a table.

Tip Breakdown Prints on Clock Out Chit — Prints a tip breakdown section, such as the tip rate%, total charge sales and tip rate, total cash tips and tip rate, and more, at the bottom of the clock out chit. ***Related Options:*** The tip breakdown appears on the clock out chit for all employees clocked in with an access level with 'Order Entry' selected.

Clock Out Chit Footer — Prints a defined guest check message as a footer at the bottom of the clock out chit. Select '00000 None' to disable the feature. ***Related Options:*** To define a footer message, create a messages in Maintenance > Messages > Guest Checks.

Gross Sales do Not Include Voids — Configures all gross sales calculations on reports to include voids.

Configuring the Reports Tab for the Printing Group

This tab enables you to print and define the time interval for the FOH Flash report. Select Maintenance > Store Settings > Printing Group > Reports tab.

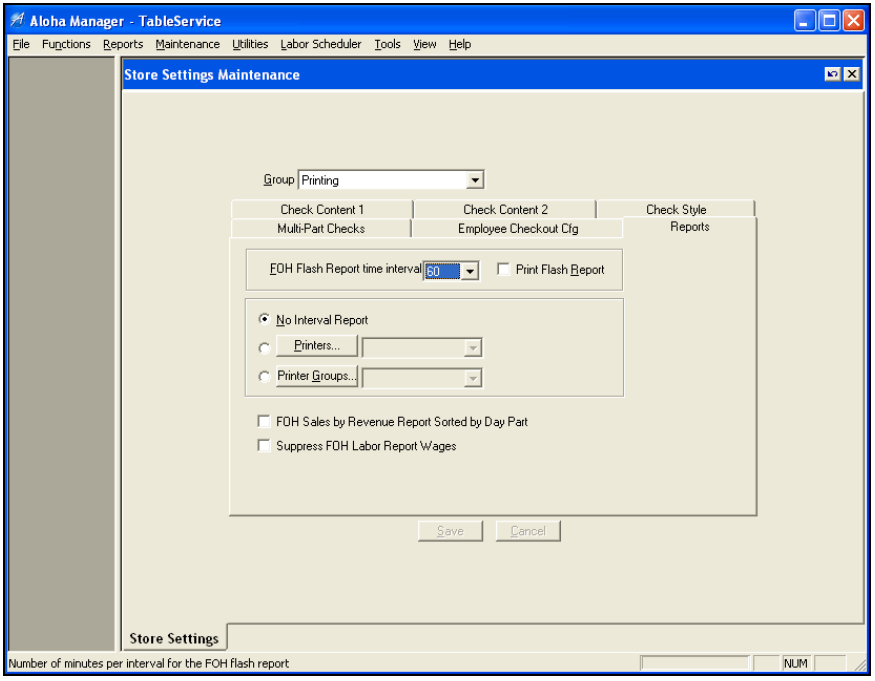


Figure 1-5 TableService Store Settings - Printing Group - Reports Tab

FOH Flash Report time interval — Determines the number of minutes, per interval, to use for displaying the FOH flash report.

Print Flash Report — Enables you to print the FOH Flash report and displays the Print button on the FOH Entire Day Summary page. If cleared, you can only view the FOH Flash report.

No Interval Report — Disables the 15-minute interval report. The Interval report prints every 15 minutes on a FOH printer as long as the sales data has changed within the 15-minute period.

Do not select this check box if you want the report to print. Typically, this is used in cafeteria environments that use TableService.

Printers — Identifies a printer to which reports will print for the Interval report. If you need to add or modify a printer, click Printer to access the Printers function. When you modify a printer, the change applies to all areas assigned to that printer.

Printer Groups — Prints the Interval report to all printers in the selected group. If you need to add or modify a printer group, click Printer Groups to access the Printer Group function. When you modify a printer group, the change applies to all areas assigned to that printer group.

FOH Sales by Revenue Report Sorted by Day Part — Enables the Revenue Center Sales report to sort by day part. If you select multiple revenue centers to print, each sorts by day part and a total prints at the bottom. If one revenue center is selected, no total prints. To run a sales report sorted by day part across all revenue centers, you can select the Restaurant Sales button on the FOH Reports screen, then the Print button, and select all day parts when prompted with the FOH Select Day Parts screen.

Suppress FOH Labor Report Wages — Does not print wages on the FOH Labor report.

Break Alert Threshold Hour(s): — Defines the threshold in which employees can work continuously without a break before appearing above the Threshold line on the FOH Break Alert report. Enter time between 0 to 24 hours in decimal time. For example, type 4.25 to enter at total of 4 hours and 15 minutes. 0 hours indicates no threshold and all employees clocked in appear on the FOH Break report. ***Required Option:*** You must clear 'Use Break Rules' in Maintenance > Store Settings > Labor group > Breaks tab to enable this option.

Enabling Employees to Run Reports

Use the Reports tab, to allow employees assigned to the access level the ability to view certain FOH reports. Select Maintenance > Labor > Access Levels > Reports to display the Reports tab. In this section we discuss only the options related to reports.

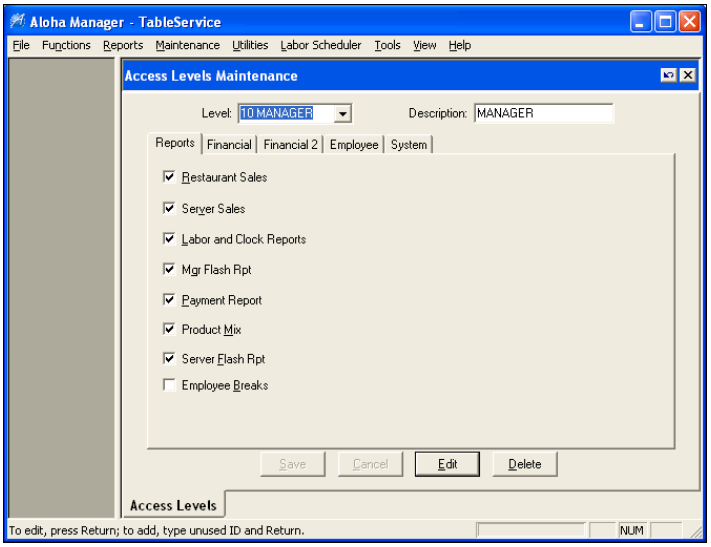


Figure 1-6 TableService Labor > Access Levels > Reports Tab

Restaurant Sales — Enables all employees using this access level to run sales reports from the FOH. ***Related Option:*** This option does not enable you to view the Flash Report, therefore, select 'Mgr Flash Rpt' or 'Server Sales' to view the Flash report.

Server Sales — Enables all employees using this access level to run server sales reports for all servers from the FOH.

Labor and Clock Reports — Enables all employees using this access level to run the FOH Labor report and clock in and clock out reports from the FOH terminal.

Mgr Flash Rpt — Enables all employees using this access level to view FOH configured sale reports.

Payment Report — Enables all employees using this access level to run the FOH Payment report from the FOH. This report prints only credit card payments. The Payment Report button appears on the FOH Reports screen.

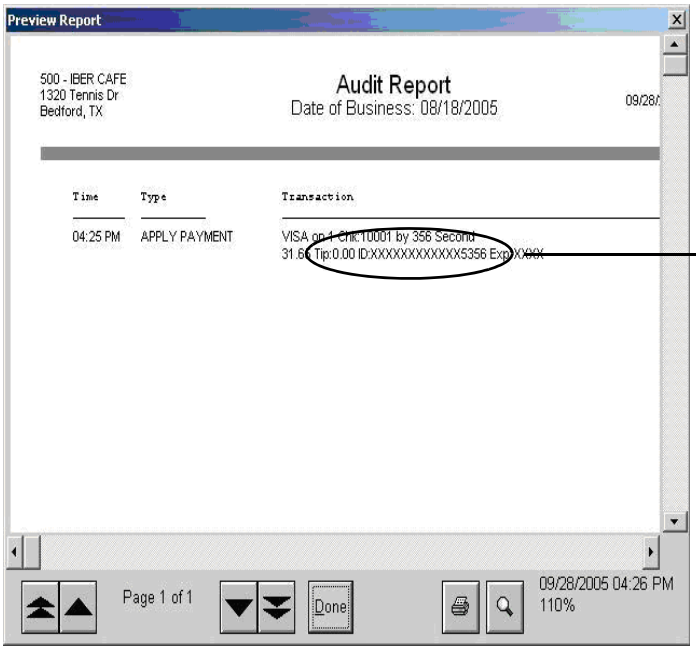
Product Mix — Enables all employees using this access level to run the FOH Product Mix report from the FOH. The PMix Report button appears on the FOH Reports screen.

Server Flash Rpt — Enables all employees using this access level to view FOH sales reports that are broken down by individual.

Employee Breaks — Enables all employees using this access level to run the FOH Employee Breaks report. The Employee Breaks button appears on the FOH Reports screen.

Configuring Audit Report to Meet PCI-DSS

To meet PCI DSS standards, mandated by new regulations in the industry, POS systems must secure all credit and debit card information by encrypting or masking the credit card numbers when they are stored or viewed within the system after the transaction occurs. The credit card information is now masked when you access the BOH Audit report.



The BOH Audit report shows only the last four digits of all credit and debit card numbers.

Figure 1-7 BOH Audit Report Sample

When you run the BOH Audit report, the system creates the Report.txt file in the Aloha/Tmp directory. When you close the preview window, the system deletes the existence of Report.txt, to ensure that credit and debit card information is not left behind to pose a security risk.

When you upgrade to v6.4, the BOH Audit report masks credit and debit card information, by default, to ensure the system is PCI DSS compliant.

PCI DSS does allow specific personnel to access this information for support reasons. In situations when you must obtain the credit or debit card number, we recommend you configure a BOH

employee to have access to this information. To do this, you must select Run for the 'Display Credit / Debit Card Numbers option for the back office security level assigned to the employee. When creating back office security levels, the system allows you to use standard starting levels from which you can build upon a level. By default, the system uses the following starting levels for the 'Display Credit / Debit Card Numbers option:

Start Level	Run	Add	Edit	Delete
Minimum	Cleared	NA	NA	NA
Typical	Cleared	NA	NA	NA
Maximum	Selected	NA	NA	NA

CAUTION

Viewing and printing credit and debit card information is not in compliance with data security standards. Configure this feature for only the appropriate personnel, such as employees who must resolve disputes as part of their job.

To display credit and debit card numbers on the BOH Audit report:

1. Select **Maintenance > Labor > BO Security Levels**. The Back Office Security Levels function appears.

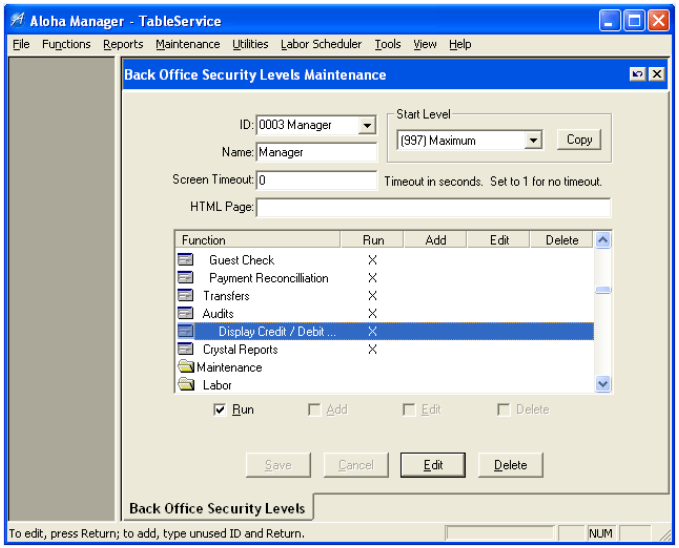


Figure 1-8 Back Office Security Levels Function

2. Select the **level** from the 'ID' drop-down list.
3. Scroll down the **list of functions** and select **Display Credit / Debit Card Numbers.**
4. Select **Run** to allow access to credit and debit card numbers on the BOH Audit report.

   OR

   Clear **Run** to mask credit and debit card numbers on the BOH Audit report.

5. Click **Save** and exit the **Back Office Security Levels** function.

When you enable the BOH Audit report to display credit and debit card numbers, the system appends the message, "<user> has displayed full card numbers from <DOB>" where *user* is the name of the employee and *DOB* is the date of business, in Debout.txt.

Analyzing Your FOH Reports

This chapter discusses the reports available from the FOH terminals.

Chapter 2

About Aloha FOH Reports

The Front-of-House (FOH) reports are generated from transactions on the FOH terminals. They are primarily used for viewing on the FOH terminal, but you can print some of them to the local printer. Unlike the configurable BOH reports, you can not make setting changes to the FOH reports while viewing them on the screen. The numbers generated on the FOH reports display totals for the current day and up to the hour.

When these reports print, the FOH stalls momentarily as all resources are used to print or view. Do not continue to touch the Print button, or the FOH will not respond. We recommend to not print the FOH reports and only view them. Use the BOH reports to print data, as explained in Chapter 3, BOH Reports.

This section discusses the FOH reports grouped by sales, labor, and then miscellaneous reports. They are not discussed in the order they appear on the Reports screen (Figure 2-2). We also discuss the Employee FOH Sales report, which is only available to employees via the Sales button on the Working with Tables screen.

Key Benefits of the Aloha FOH Reports

The following is a list of the Aloha FOH reports available to you and their key benefits. Buttons that differ from the report title are indicated in parenthesis:

Restaurant Sales Report — Displays and prints sales information from all terminals in use through eight views, including comps, promos, net sales, gross sales, and more. To a manager this is the most important report for your sales reporting.

Sales by Revenue Center Report — Prints category sales information from terminals within each revenue center, and a summary of all revenue centers.

Server Sales Report — Displays and prints sales information by category for each employee, total number of guests and checks, and the time each employee clocked in.

Flash Report — Displays and prints sales, labor, and performance measure information from all terminals for the last completed time interval defined in the BOH. For example, if you define the Flash report interval as an hour, then you see data generated from the last hour.

Labor Report — Prints labor information from all terminals in use for labor dollars and labor hours.

Employee Clock In/Out Report (no title) — Displays and prints clock in and clock out information for each employee for the day.

Employees Clocked In Report (Employees on Clock) — Prints all employees currently on the clock, by job code. This is helpful when closing your restaurant and you want to know who is still on the clock.

Employee Breaks Report — Displays and prints the start and end times of breaks, with a cumulative total, per shift, for each employee. This allows store managers to easily manage the breaks their employees are required to take.

Break Alert Report — Displays and prints break information by each employee, and when each rest and meal break is due for the employee.

Payment Report — Prints non-cash tender information for each employee by tender.

Item Availability Report — Prints remaining counts for items which have been marked as unavailable or available with a limited count.

Drawer Report (Drawer Payments Report) — Prints non-cash transactions and cash in and out transactions performed by each employee assigned to the drawer, and the total amount of cash in the drawer.

Product Mix Report — Displays and prints product information in four separate sorting views for all items sold from all terminals in use.

Employee FOH Sales Report — Displays sales, cash owed, and performance measure information for a specific employee. This is a report for employees, not for managers.

To access the FOH reports:

1. Log in to the **FOH**. The Special Functions screen appears.

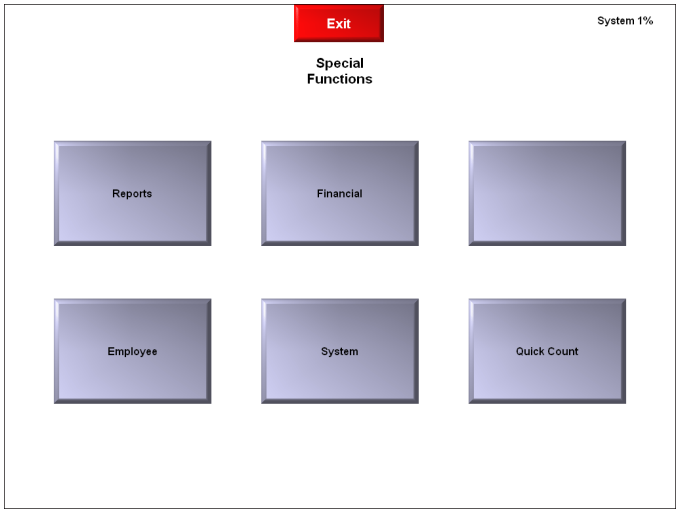


Figure 2-1 Special Functions Screen

2. If the Special Functions screen does not appear upon log in, touch **Special Functions** on the Working with Tables screen. This is for scenarios where managers are able to perform order entry.

3. Touch **Reports** to display the Reports screen.

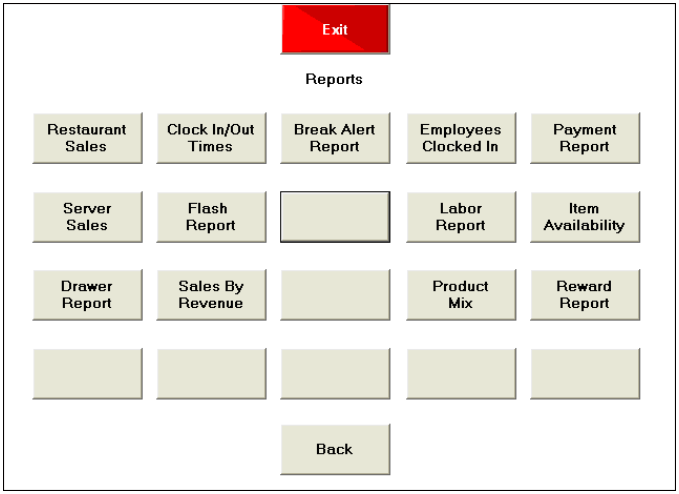


Figure 2-2 Reports Screen

Common Buttons on the FOH Reports Screen

Most reports contain arrow buttons for up, down, left, and right navigation. Use these to view more of the report. Touch Print to print the report to a local printer and Done to exit the report.

The following common buttons are available on most of the FOH reports:


Displays the next page of the report.


Displays the prior page of the report.


Moves to the left on the current page.


Moves to the right on the current page.

Prints the current page to the receipt printer.

Prints the entire report to the receipt printer.

Exits the corresponding report without printing.

Sales Reports

You generate revenue through sales transactions from the FOH terminals. The Aloha reports offer several ways to view your sales, such as by day part, by employee, by revenue center, and by a defined time period.

We discuss the following reports pertaining to sales:

- Restaurant Sales Report
- Sales by Revenue Center Report
- Server Sales Report
- Flash Report

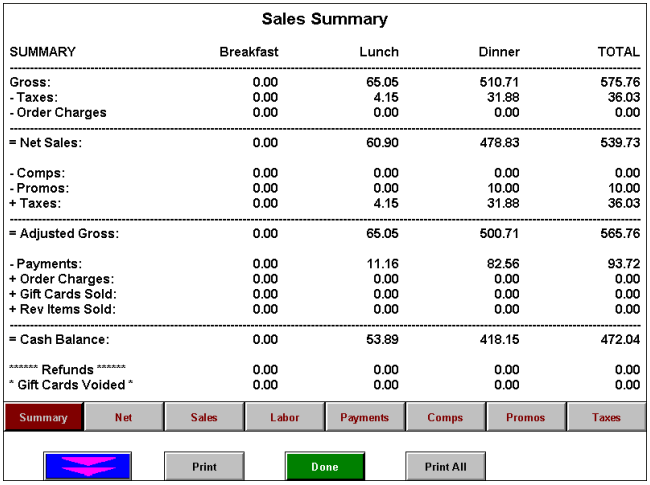
Restaurant Sales Report

Touch Restaurant Sales on the FOH Reports screen to display and print the Restaurant Sales report. The report provides a summary of up to date data based on sales generated for the day, by day part. To a manager, it is the most important report, as it reports information in several formats, depending on your needs.

The Restaurant Sales report has eight view options: Summary, Net, Sales, Labor, Payments, Comps, Promos, and Taxes. Touch Print to print the report for the corresponding view. Touch Print All to print all views of the report.

Summary View

The Sales Summary view appears each time you access the Restaurant Sales report. This view displays sales information, by day part, based on the following on screen calculation: net sales (gross sales - taxes - order mode charges) - comps - promos + taxes - payments + order mode charges + gift certificates sold - gift certificate comps - gift certificate promos + revenue items sold = cash balance. An ending void section displays for voided gift certificates and voided revenue items.



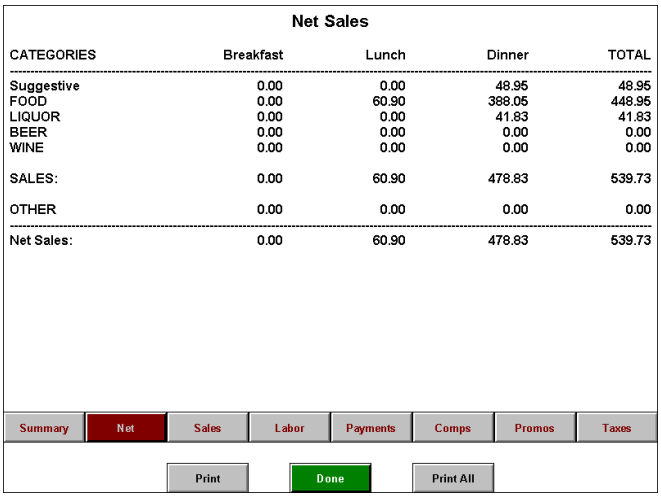
Sales Summary

SUMMARY	Breakfast	Lunch	Dinner	TOTAL
Gross:	0.00	65.05	510.71	575.76
- Taxes:	0.00	4.15	31.88	36.03
- Order Charges	0.00	0.00	0.00	0.00
= Net Sales:	0.00	60.90	478.83	539.73
- Comps:	0.00	0.00	0.00	0.00
- Promos:	0.00	0.00	10.00	10.00
+ Taxes:	0.00	4.15	31.88	36.03
= Adjusted Gross:	0.00	65.05	500.71	565.76
- Payments:	0.00	11.16	82.56	93.72
+ Order Charges:	0.00	0.00	0.00	0.00
+ Gift Cards Sold:	0.00	0.00	0.00	0.00
+ Rev Items Sold:	0.00	0.00	0.00	0.00
= Cash Balance:	0.00	53.89	418.15	472.04
****** Refunds ******	0.00	0.00	0.00	0.00
* Gift Cards Voided *	0.00	0.00	0.00	0.00

Figure 2-3 Restaurant Sales Report - Summary View

Net View

Touch Net to display the Net Sales view. The Net Sales view displays the total net sales amount for each sales and retail category, broken down by day part. It includes a grand total for each category, and each day part.



Net Sales

CATEGORIES	Breakfast	Lunch	Dinner	TOTAL
Suggestive	0.00	0.00	48.95	48.95
FOOD	0.00	60.90	388.05	448.95
LIQUOR	0.00	0.00	41.83	41.83
BEER	0.00	0.00	0.00	0.00
WINE	0.00	0.00	0.00	0.00
SALES:	0.00	60.90	478.83	539.73
OTHER	0.00	0.00	0.00	0.00
Net Sales:	0.00	60.90	478.83	539.73

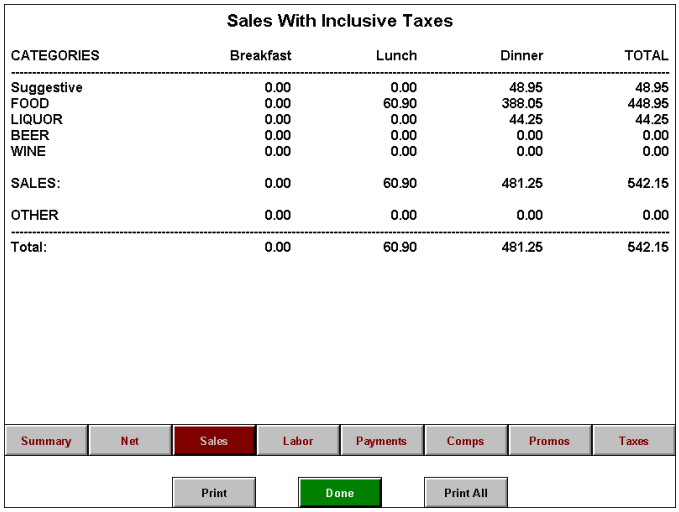
Summary | Net | Sales | Labor | Payments | Comps | Promos | Taxes

Print | Done | Print All

Figure 2-4 Restaurant Sales Report - Net Sales View

Sales View

Touch Sales to display the Sales with Inclusive Taxes view. The Sales with Inclusive Taxes view displays the total sales amount for each sales and retail category, broken down by day part. The sales amount equals: net sales + inclusive taxes + comps. It also includes a grand total for each category, and each day part.



Sales With Inclusive Taxes

CATEGORIES	Breakfast	Lunch	Dinner	TOTAL
Suggestive	0.00	0.00	48.95	48.95
FOOD	0.00	60.90	388.05	448.95
LIQUOR	0.00	0.00	44.25	44.25
BEER	0.00	0.00	0.00	0.00
WINE	0.00	0.00	0.00	0.00
SALES:	0.00	60.90	481.25	542.15
OTHER	0.00	0.00	0.00	0.00
Total:	0.00	60.90	481.25	542.15

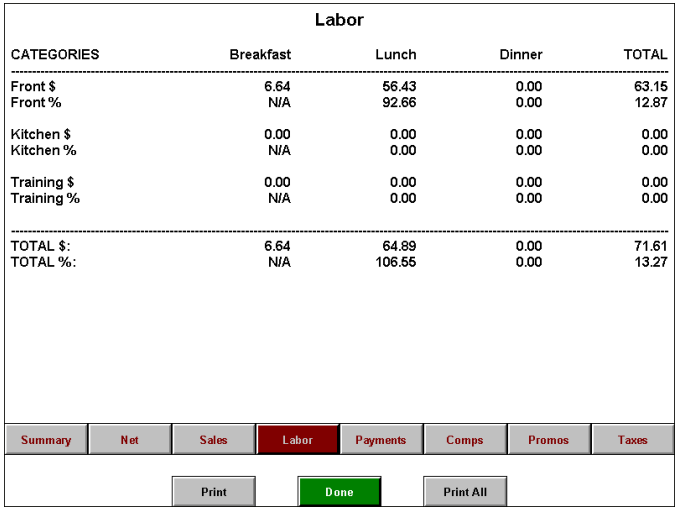
Summary | Net | Sales | Labor | Payments | Comps | Promos | Taxes

Print | Done | Print All

Figure 2-5 Restaurant Sales Report - Sales with Inclusive Taxes View

Labor View

Touch Labor to display the Labor view. The Labor view displays the total labor dollars and percentages for each of the defined labor groups, broken down by day part. It includes a grand total for each labor group, and each day part.



Labor

CATEGORIES	Breakfast	Lunch	Dinner	TOTAL
Front $	6.64	56.43	0.00	63.15
Front %	N/A	92.66	0.00	12.87
Kitchen $	0.00	0.00	0.00	0.00
Kitchen %	N/A	0.00	0.00	0.00
Training $	0.00	0.00	0.00	0.00
Training %	N/A	0.00	0.00	0.00
TOTAL $:	6.64	64.89	0.00	71.61
TOTAL %:	N/A	106.55	0.00	13.27

Summary | Net | Sales | Labor | Payments | Comps | Promos | Taxes

Print | Done | Print All

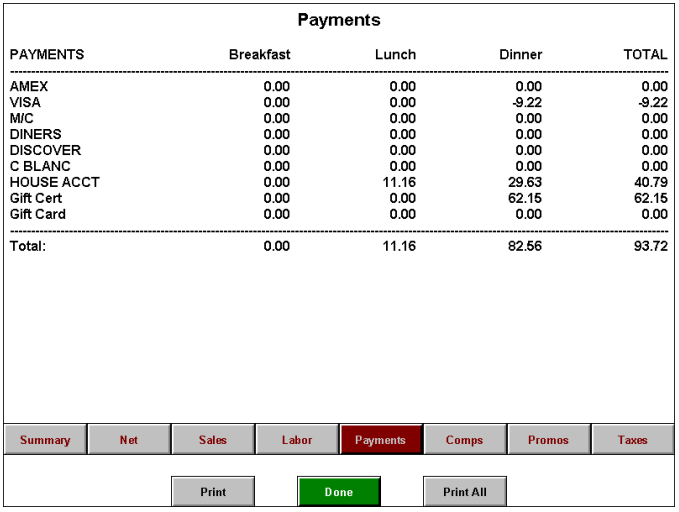
Figure 2-6 Restaurant Sales Report - Labor View

$ — Displays the amount of labor dollars earned by each employee in the specified labor group and period.

% — Displays the labor percentage based on the following calculation: labor dollars / (net sales + inclusive taxes + comps) x 100 sales + inclusive taxes + comps.

Payments View

Touch Payments to display the Payments view. The Payments view displays total payments made with non-cash tenders, broken down by tender type, then by day part. It includes a grand total for each non-cash tender type, and each day part.



Payments

PAYMENTS	Breakfast	Lunch	Dinner	TOTAL
AMEX	0.00	0.00	0.00	0.00
VISA	0.00	0.00	-9.22	-9.22
M/C	0.00	0.00	0.00	0.00
DINERS	0.00	0.00	0.00	0.00
DISCOVER	0.00	0.00	0.00	0.00
C BLANC	0.00	0.00	0.00	0.00
HOUSE ACCT	0.00	11.16	29.63	40.79
Gift Cert	0.00	0.00	62.15	62.15
Gift Card	0.00	0.00	0.00	0.00
Total:	0.00	11.16	82.56	93.72

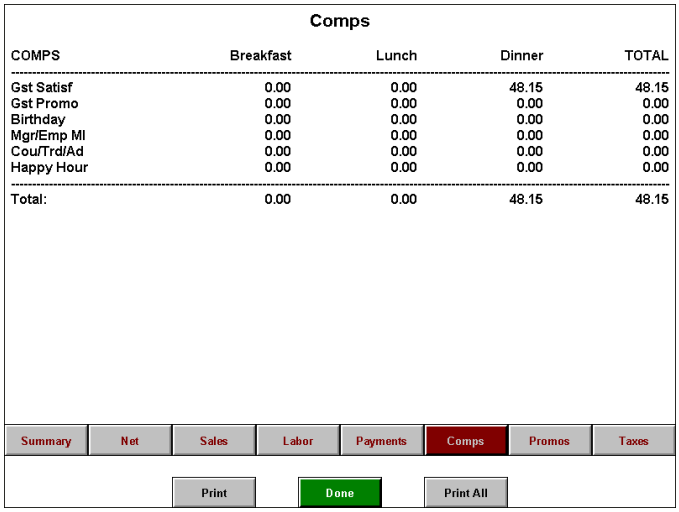
Summary | Net | Sales | Labor | Payments | Comps | Promos | Taxes

Print | Done | Print All

Figure 2-7 Restaurant Sales Report - Payments View

Comps View

Touch Comps to display the Comps view. The Comps view displays the total comp amounts applied to guest checks, broken down by the comp type, then by day part. It includes a grand total for each type of comp, and each day part.



Comps

COMPS	Breakfast	Lunch	Dinner	TOTAL
Gst Satisf	0.00	0.00	48.15	48.15
Gst Promo	0.00	0.00	0.00	0.00
Birthday	0.00	0.00	0.00	0.00
Mgr/Emp Ml	0.00	0.00	0.00	0.00
Cou/Trd/Ad	0.00	0.00	0.00	0.00
Happy Hour	0.00	0.00	0.00	0.00
Total:	0.00	0.00	48.15	48.15

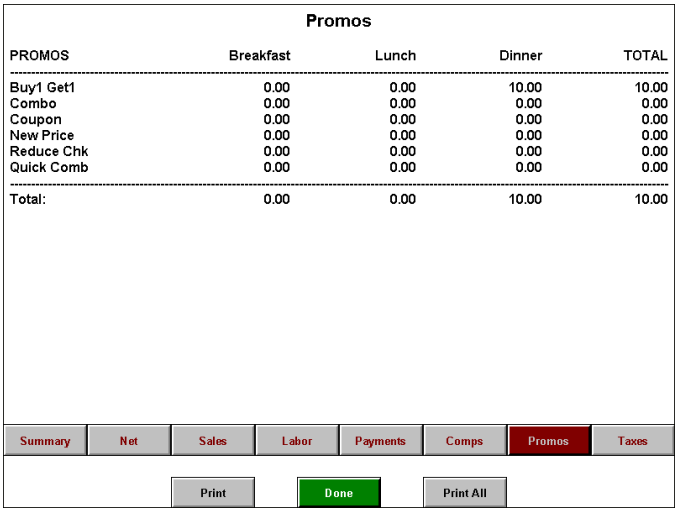
Summary | Net | Sales | Labor | Payments | Comps | Promos | Taxes

Print | Done | Print All

Figure 2-8 Restaurant Sales Report - Comps View

Promos View

Touch Promos to display the Promos view. The Promos view displays the total promo amounts applied to guest checks, broken down by the promo type, then by day part. It includes a grand total for each type of promo, and each day part.



Promos

PROMOS	Breakfast	Lunch	Dinner	TOTAL
Buy1 Get1	0.00	0.00	10.00	10.00
Combo	0.00	0.00	0.00	0.00
Coupon	0.00	0.00	0.00	0.00
New Price	0.00	0.00	0.00	0.00
Reduce Chk	0.00	0.00	0.00	0.00
Quick Comb	0.00	0.00	0.00	0.00
Total:	0.00	0.00	10.00	10.00

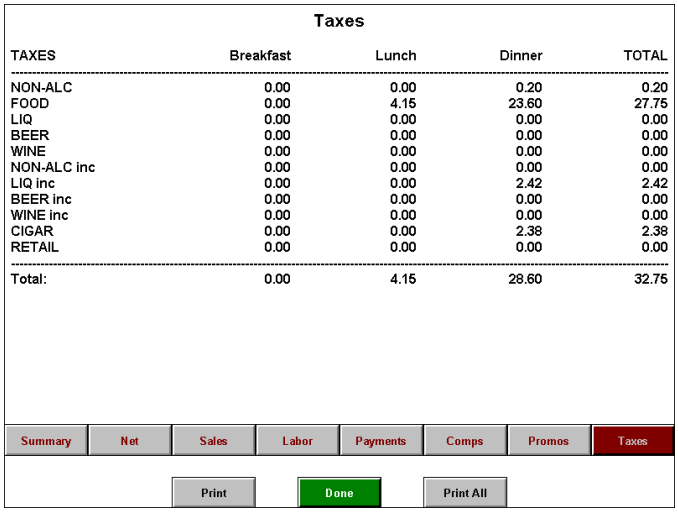
Summary | Net | Sales | Labor | Payments | Comps | Promos | Taxes

Print | Done | Print All

Figure 2-9 Restaurant Sales Report - Promos View

Taxes View

Touch Taxes to display the Taxes view. The Taxes view displays the total amount of taxes, broken down by the type of tax, then by day part. It includes a grand total for each type of tax, and each day part.



Taxes

TAXES	Breakfast	Lunch	Dinner	TOTAL
NON-ALC	0.00	0.00	0.20	0.20
FOOD	0.00	4.15	23.60	27.75
LIQ	0.00	0.00	0.00	0.00
BEER	0.00	0.00	0.00	0.00
WINE	0.00	0.00	0.00	0.00
NON-ALC inc	0.00	0.00	0.00	0.00
LIQ inc	0.00	0.00	2.42	2.42
BEER inc	0.00	0.00	0.00	0.00
WINE inc	0.00	0.00	0.00	0.00
CIGAR	0.00	0.00	2.38	2.38
RETAIL	0.00	0.00	0.00	0.00
Total:	0.00	4.15	28.60	32.75

Figure 2-10 Restaurant Sales Report - Taxes View

Sales by Revenue Center Report

Touch Sales by Revenue on the FOH Reports screen to display the Select Revenue Centers to Print screen. Then print the Sales by Revenue Center report to the local receipt printer. You can select a specific revenue center, or select All or None. Depending on the number of defined revenue centers, this report can be long.

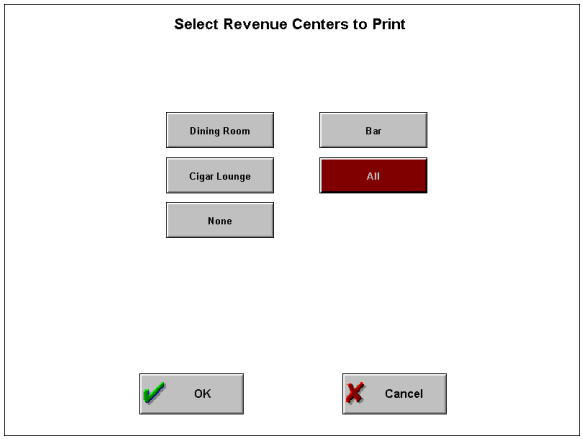


Figure 2-11 Select Revenue Centers to Print Screen

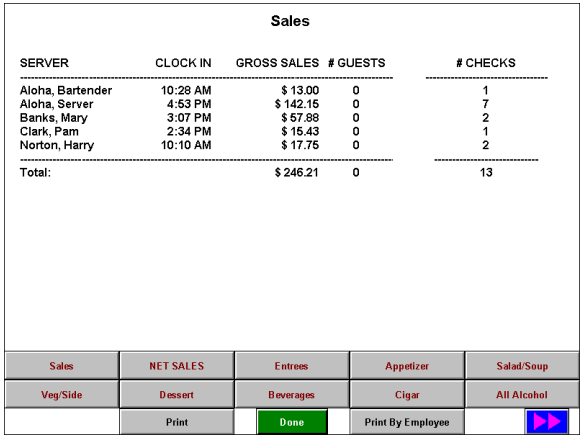
The report shows sales by sales and retail categories, taxes, grand total (net sales + taxes), number of checks, check average (grand total sales/checks), number of guests, and guest average (grand total sales/guests), broken out by revenue center, as shown in Figure 2-12:

11/15/02		Bar
04:04 PM		
	Sales by Revenue Center	
	Cat Sales for Main	
Food		2.00
Liquor		2.75
Beer		0.00
Total		4.75
Tax		0.33
Grand Total		5.08
# Checks		1
Avg Checks		5.08
# Guests		1
Avg Guests		5.08
	** Cat Sales for All Rev Cnts**	
Food		2.00
Liquor		2.75
Beer		0.00
Wine		0.00
Total		4.75
Tax		0.33
Grand Total		5.08
# Checks		1
Avg Checks		5.08
# Guests		1
Avg Guests		5.08

Figure 2-12 Sales by Revenue Center Report

Server Sales Report

Touch Server Sales on the FOH Reports screen to display and print the Server Sales report. The Server Sales report lists each employee, the time in which they clocked in, their total gross sales, the total number of guests they served, and their total number of guest checks. It includes a grand total for gross sales, number of guests, and number of checks. Touch Print to print the report. Touch Print by Employee to print a report for each employee.



Sales

SERVER	CLOCK IN	GROSS SALES	# GUESTS	# CHECKS
Aloha, Bartender	10:28 AM	$ 13.00	0	1
Aloha, Server	4:53 PM	$ 142.15	0	7
Banks, Mary	3:07 PM	$ 57.88	0	2
Clark, Pam	2:34 PM	$ 15.43	0	1
Norton, Harry	10:10 AM	$ 17.75	0	2
Total:		$ 246.21	0	13

Figure 2-13 Server Sales Report

Server — Designates the name of the employee.

Clock In — Designates the time the employee clocked in.

Gross Sales — Designates the amount of sales generated by the employee from all terminals.

 # Guests — Designates the number of guest count generated by the employee from all terminals.

 # Checks — Designates the number of checks generated by the employee from all terminals.

Flash Report

Touch Flash Report on the FOH Reports screen to display the Flash report. The Flash report provides a summary of data based on sales generated for the day, up to the last completed time interval. It is the most important report, as it lets you look at the information for the current day right now, to help you make important decisions regarding staffing, service, and more.

The Flash report has five view options: Last Period, Entire Day Summary, Entire Day Net Sales, Entire Day Performance, and Entire Day Labor. Touch Print to print the Entire Day Summary view.

Last Period View

The Last Period view appears each time you access the Flash report. The Last Period view displays sales, labor, and performance measure information for the last completed time interval.

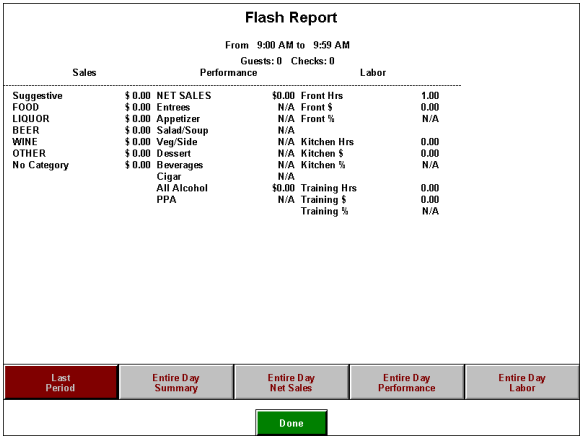


Figure 2-14 Flash Report - Last Period View

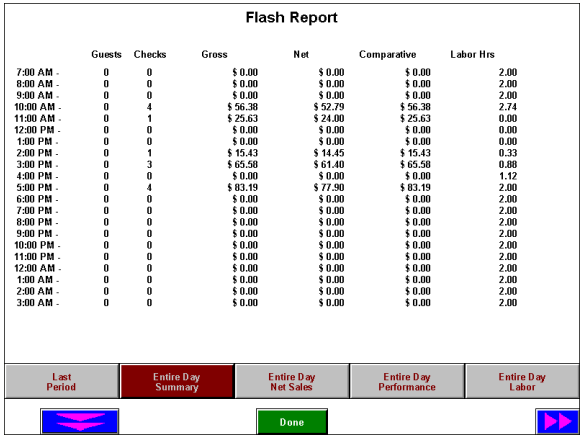
Sales — Displays sales by categories for the last completed time interval, from all terminals.

Performance — Displays sales and labor percentages defined for each performance measure, for the last completed time interval.

Labor — Displays labor dollars and percentages defined for each labor group, for the last completed time interval.

Entire Day Summary View

Touch Entire Day Summary to display the Entire Day Summary view. The Entire Day Summary view displays the number of guests, number of checks, gross and net sales amounts, and labor information for each time interval.



Flash Report

	Guests	Checks	Gross	Net	Comparative	Labor Hrs
7:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
8:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
9:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
10:00 AM -	0	4	$ 56.38	$ 52.79	$ 56.38	2.74
11:00 AM -	0	1	$ 25.63	$ 24.00	$ 25.63	0.00
12:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	0.00
1:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	0.00
2:00 PM -	0	1	$ 15.43	$ 14.45	$ 15.43	0.33
3:00 PM -	0	3	$ 65.58	$ 61.40	$ 65.58	0.88
4:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	1.12
5:00 PM -	0	4	$ 83.19	$ 77.90	$ 83.19	2.00
6:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
7:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
8:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
9:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
10:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
11:00 PM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
12:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
1:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
2:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00
3:00 AM -	0	0	$ 0.00	$ 0.00	$ 0.00	2.00

Figure 2-15 Flash Report - Entire Day Summary View

Guests — Specifies the number of guests by each time interval.

Checks — Specifies the number of checks by each time interval.

Gross — Designates the total amount of gross sales by each time interval, based on the following calculation: net sales + surchages + order mode charges + exclusive taxes.

Net — Designates the total amount of net sales by each time interval, based on the following calculation: net sales - inclusive taxes.

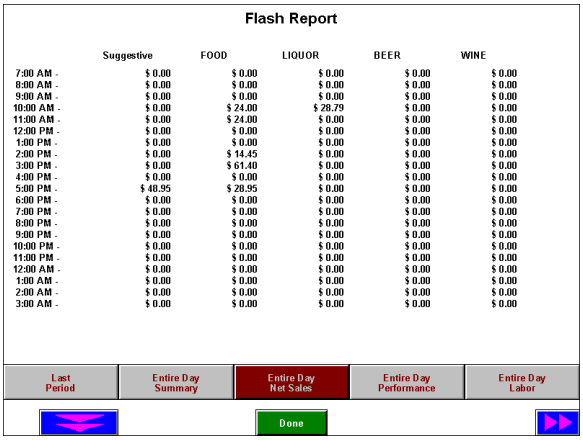
Comparative — This column is currently not in use.

Labor $ — Designates the amount of labor dollars earned by each time interval. The labor dollar is a total amount of dollars earned by each employee in the labor group and interval.

Labor % — Designates the labor percentage by each time interval, based on the following calculation: sales amount / labor dollars x 100.

Entire Day Net Sales Summary View

Touch Entire Day Net Sales to display the Entire Day Net Sales view. The Entire Day Net Sales Summary view displays the net sales for each sales and retail category, broken down by time interval.



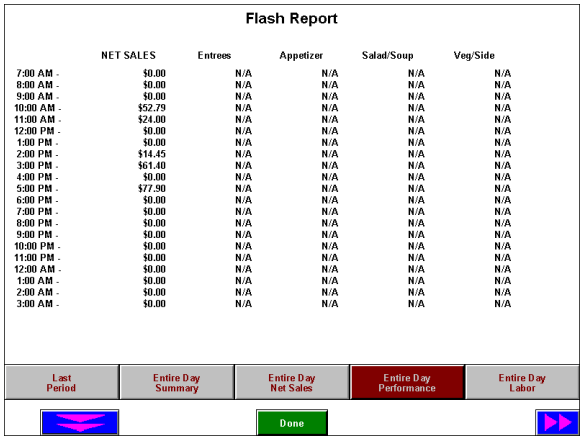
Flash Report

	Suggestive	FOOD	LIQUOR	BEER	WINE
7:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
9:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
10:00 AM -	$ 0.00	$ 24.00	$ 28.79	$ 0.00	$ 0.00
11:00 AM -	$ 0.00	$ 24.00	$ 0.00	$ 0.00	$ 0.00
12:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
1:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
2:00 PM -	$ 0.00	$ 14.45	$ 0.00	$ 0.00	$ 0.00
3:00 PM -	$ 0.00	$ 61.40	$ 0.00	$ 0.00	$ 0.00
4:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5:00 PM -	$ 40.95	$ 28.95	$ 0.00	$ 0.00	$ 0.00
6:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
7:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
9:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
10:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
11:00 PM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
12:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
1:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
2:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
3:00 AM -	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

Figure 2-16 Flash Report - Entire Day Net Sales View

Entire Day Performance View

Touch Entire Day Performance to display the Entire Day Performance view. The Entire Day Performance view reports information pertaining to performance measures by type, by time interval, with ending day part totals, and a grand total.



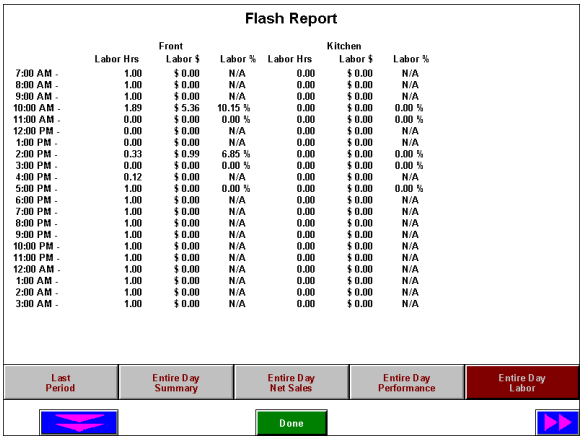
Flash Report

	NET SALES	Entrees	Appetizer	Salad/Soup	Veg/Side
7:00 AM -	$0.00	N/A	N/A	N/A	N/A
8:00 AM -	$0.00	N/A	N/A	N/A	N/A
9:00 AM -	$0.00	N/A	N/A	N/A	N/A
10:00 AM -	$52.79	N/A	N/A	N/A	N/A
11:00 AM -	$24.00	N/A	N/A	N/A	N/A
12:00 PM -	$0.00	N/A	N/A	N/A	N/A
1:00 PM -	$0.00	N/A	N/A	N/A	N/A
2:00 PM -	$14.45	N/A	N/A	N/A	N/A
3:00 PM -	$61.40	N/A	N/A	N/A	N/A
4:00 PM -	$0.00	N/A	N/A	N/A	N/A
5:00 PM -	$77.90	N/A	N/A	N/A	N/A
6:00 PM -	$0.00	N/A	N/A	N/A	N/A
7:00 PM -	$0.00	N/A	N/A	N/A	N/A
8:00 PM -	$0.00	N/A	N/A	N/A	N/A
9:00 PM -	$0.00	N/A	N/A	N/A	N/A
10:00 PM -	$0.00	N/A	N/A	N/A	N/A
11:00 PM -	$0.00	N/A	N/A	N/A	N/A
12:00 AM -	$0.00	N/A	N/A	N/A	N/A
1:00 AM -	$0.00	N/A	N/A	N/A	N/A
2:00 AM -	$0.00	N/A	N/A	N/A	N/A
3:00 AM -	$0.00	N/A	N/A	N/A	N/A

Figure 2-17 Flash Report - Entire Day Performance View

Entire Day Labor View

Touch Entire Day Labor to display the Entire Day Labor view. The Entire Day Labor view displays the labor hours, labor dollars, and labor percentages for each labor group, broken down by time interval.



Flash Report

	Front			Kitchen		
	Labor Hrs	Labor $	Labor %	Labor Hrs	Labor $	Labor %
7:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
8:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
9:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
10:00 AM -	1.09	$ 5.36	10.15 %	0.00	$ 0.00	0.00 %
11:00 AM -	0.00	$ 0.00	0.00 %	0.00	$ 0.00	0.00 %
12:00 PM -	0.00	$ 0.00	N/A	0.00	$ 0.00	N/A
1:00 PM -	0.00	$ 0.00	N/A	0.00	$ 0.00	N/A
2:00 PM -	0.33	$ 0.99	6.85 %	0.00	$ 0.00	0.00 %
3:00 PM -	0.00	$ 0.00	0.00 %	0.00	$ 0.00	0.00 %
4:00 PM -	0.12	$ 0.00	N/A	0.00	$ 0.00	N/A
5:00 PM -	1.00	$ 0.00	0.00 %	0.00	$ 0.00	0.00 %
6:00 PM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
7:00 PM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
8:00 PM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
9:00 PM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
10:00 PM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
11:00 PM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
12:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
1:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
2:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A
3:00 AM -	1.00	$ 0.00	N/A	0.00	$ 0.00	N/A

Figure 2-18 Flash Report - Entire Day Labor View

Labor Reports

Labor dollars are very important to the profit margin of your restaurant. The less labor dollars you spend, the higher the margin.

We discuss the following reports pertaining to labor:

- Labor Report
- Clocked In/Out Times Report
- Employees Clocked In Report
- Employee Breaks Report
- Break Alert Report

The Flash report, discussed in the Sales Report section, also contains information for labor reporting.

Labor Report

Touch Labor Report on the FOH Reports screen to print the Labor Report. This report shows labor hours and cost based on time intervals defined in Maintenance > Store Settings > Labor on the Clock In/Out tab, with an ending total.

Labor Report

Unit # 100 DOB 11/15/99

04:17 PM 11/15/99

Time	Employees	Hours	Cost
10:30			
11:00	1	0:00	0.00
11:30	1	0:30	5.00
12:00	1	0:30	5.00
12:30	1	0:30	5.00
1:00	1	0:30	5.00
1:30	1	0:30	5.00
2:00	1	0:30	5.00
2:30	1	0:30	5.00
3:00	1	0:30	5.00
3:30	1	0:30	5.00
4:00	1	0:30	5.00
4:17	1	0:17	2.83
Total	1	5:17	2.83

Figure 2-19 Labor Report

Time — Designates the defined time interval.

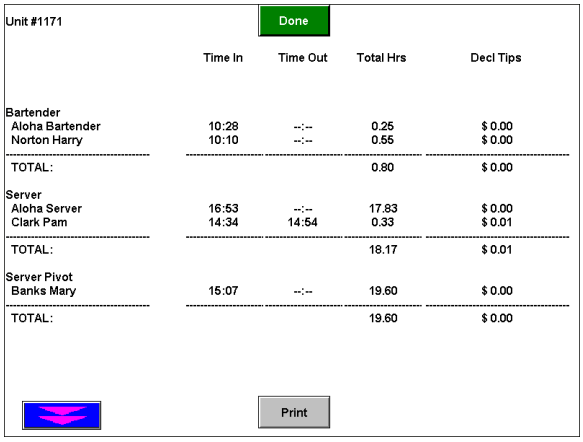
Employees — Designates the number of employees who were clocked in for the defined time interval.

Hours — Designates the number of labor hours, for each defined time interval, based on the following calculation: (number of minutes) x (number of employees).

Cost — Designates the labor dollars earned, based on the following calculation: total dollar amount of pay rates for all employees clocked in (pay rate + pay rate) x hours.

Clock In/Out Times Report

Touch Clock In/Out Times on the FOH Reports screen to display the Clock In/Out Times report. This report displays clock in and out information by each employee, sorted by job code, with an ending total. It also includes total hours and declared tips.



Unit #1171 | Done

	Time In	Time Out	Total Hrs	Decl Tips
Bartender				
Aloha Bartender	10:28	--:--	0.25	$ 0.00
Norton Harry	10:10	--:--	0.55	$ 0.00
TOTAL:			0.80	$ 0.00
Server				
Aloha Server	16:53	--:--	17.83	$ 0.00
Clark Pam	14:34	14:54	0.33	$ 0.01
TOTAL:			18.17	$ 0.01
Server Pivot				
Banks Mary	15:07	--:--	19.60	$ 0.00
TOTAL:			19.60	$ 0.00

Print

Figure 2-20 Clock In Out Report

Press Print to print this report to the local receipt printer. You receive a “Print Wages?” prompt. Press No if you do not want the pay rate, total pay, and summary total to print on the report. Press Yes to print this information.

If you never want the wage information to print on this report, edit the NEVERPRINT-FOHWAGES variable in ALOHA.INI and set it to TRUE. You will no longer receive the prompt to print the wage information on this report.

Time In — Designates the time the employee clocked in.

Time Out — Designates the time the employee clocked out.

Total Hrs — Designates the total hours the employee worked on the clock based on the following calculation: time out - time in.

Decl Tips — Designates the amount of tips declared by the employee.

Employees Clocked In Report

Touch Employees Clocked In on the FOH Reports screen to print the Employees on Clock report. The report lists all employees by job code currently on the clock and the time they clocked in. You should use this report when you are closing to ensure your employees have clocked out before the End-of-Day runs.

```
                    Employees on Clock

04:12 PM                                11/15/99

Server
Server, Server1                         11:00 AM
Server, Server2                         11:15 AM

Bartender
Bar, Bartender1                         10:30 AM
Bar, Bartener2                          10:45

Cashier
Cashier, Cashier1                       11:15 AM

                  ***************************
```

Figure 2-21 Employees on Clock Report

Employee Breaks Report

Touch Employees Breaks to print the Employees Breaks report. The report includes the start and end times, with a cumulative total, per shift, for each employee. This allows store managers to easily manage the breaks their employees are required to take.

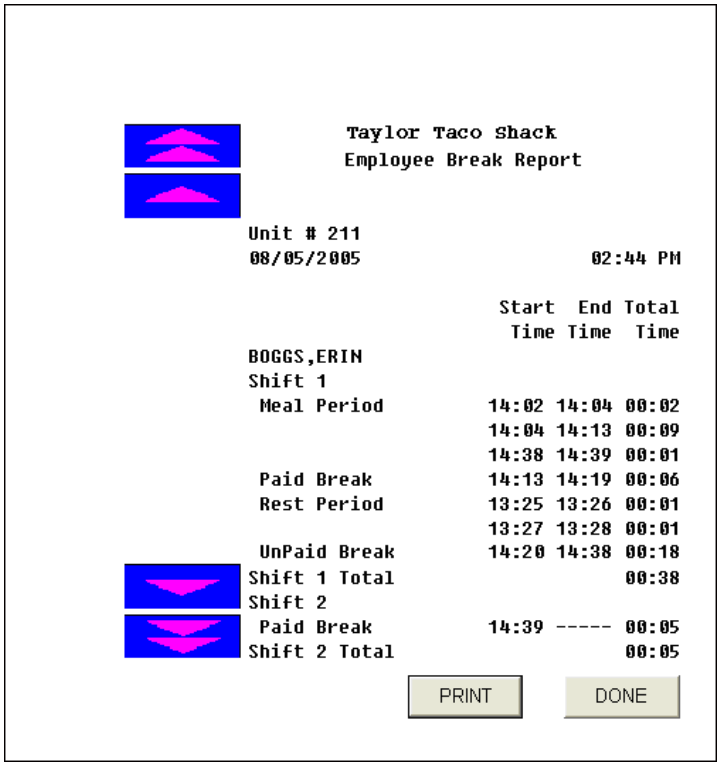


Figure 2-22 FOH Employee Breaks Report

4. Touch **Print** to print the report to the local receipt printer.

Aloha Diner
Employee Breaks Report
Unit #311
8/1/2005 12:32 AM

	Start Time	End Time	Total Time
Austin, Michael			
Shift 1			
Meal Period	10:20	10:57	0.30
	14:08	14:38	0.30
Paid Break	16:13	16:33	0.20
	16:41	16:45	0.04
Rest Period	12:55	13:08	0.13
	14:02	14:04	0.02
	23:58	1:08	0.10
Unpaid Break	11:58	12:06	0.08
	14:44	14:48	0.04
	17:29	18:15	0.46
Employee Total			2.07

TOTAL ALL 3.08

**********End of Report**********

Figure 2-23 FOH Employee Breaks Report

Start Time — Time the employee clocked out for their break.

End Time — Time the employee clocked in from their break. If the employee is currently on break, the time is replaced by '------.'

Total Time — Total time of the break based on the following calculation: end time - start time. If the employee is currently on break, the system does not calculate the current break.

<employee's name> — Name of the employee. The report sorts in ascending order by the last name of the employee, then by ID number.

<shift number> — Shift number of the current day the employee worked. For example, if the break occurred during the employee's second shift of a double shift, 'Shift 2' displays. If the employee worked only one shift for the day, or did not take a break for the shift, the heading does not display.

<break type> — Break type the employee takes, such as meal, paid, rest, and unpaid. The break types display in alphabetical order.

<shift total> — Total time of break minutes the employee takes for the shift.

Employee Total — Total time of break minutes the employee takes for the day, including all shifts.

TOTAL ALL — Total time of break minutes in which all employee takes for the day.

You enable the system to display the total time in minutes and hundredths on the report and printed chits when you select 'Display ClockIn/ClockOut Chit in Minutes and Hundredths' in Maintenance > Store Settings > Financials group > Reports. For example, if the time is 30 minutes, the report displays 0.50.

Break Alert Report

Touch Break Alert Report on the FOH Reports screen to display the Break Alert Report. This report displays break information by each employee, and when each rest and meal break is due for the employee.

In most U.S. jurisdictions, employees are required, by law, to take a break after a certain amount of time of work, to meet labor code standards. Some states, in particular, California, use very strict labor code standards called rest period and meal period breaks, which legally bind employers to give their employees breaks. Under these laws, employers could be subjected to legal actions taken by employees if the break is not taken, and often times they must remind or force their employees to take a break at a certain time to stay within the labor rules. These break rules are defined in the Aloha system in Maintenance > Store Settings > Labor group > Breaks.

With many responsibilities ranging from overseeing guest satisfaction to ensuring proper food preparation, managers often overlook the need to allow their employees to take a break. You can now use the FOH Break Alert report to list the employees currently clocked in who are due to take a break. There are two versions of the report, based on if you are using the Break Rules feature, or using a generic formula which utilizes a threshold method to indicate employees who have worked past their break time.

If you do not use the Break Rules feature, you must define a threshold for the system to use to determine when an employee is due for a break. This threshold determines the number of hours and minutes an employee can continuously work without taking a break, before the employee appears above the threshold line on the Break Alert report.

In both versions, the reports group employees first by labor groups, then sort employees who have exceeded the required time, in descending order. If you select ‘Do Not Print Job Code’ in Maintenance > Labor > Job Codes > Job Code for a job code, employees assigned to the job code do not appear on the report.

You cannot define a threshold to use for the Break Alert report, if ‘Use Break Rules’ is selected in Maintenance > Store Settings > Labor group > Breaks.

GENERIC BREAK FORMULA SCENARIO: A restaurant is not restricted by the Break Rules feature, however, needs to determine which employees are due to take a break. Define an hourly threshold that determines the employees who are due for a break. The manager can access the FOH Break Alert report and quickly determine who worked continuously without a break and exceeded the defined threshold.

BREAK RULES SCENARIO: A restaurant is restricted by the Break Rules feature, and must legally give their employees rest and meal period breaks. The manager can access the FOH Break Alert report and quickly determine who worked continuously without a break, based on the break rules defined in Maintenance > Store Settings > Labor group > Breaks.

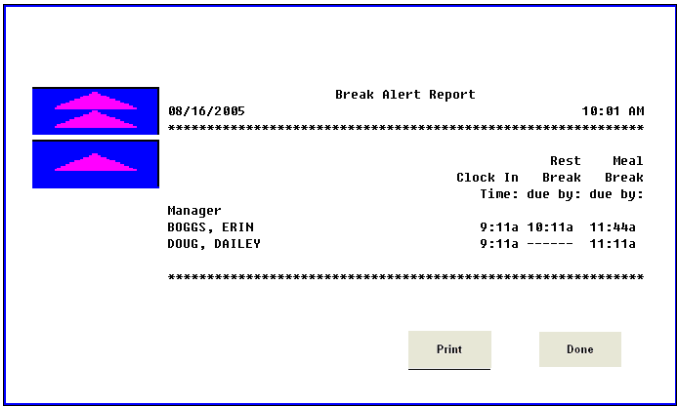


Figure 2-24 Break Alert Report

Touch **Print** to print the report to the local receipt printer. The information in the report depends on if you are using the generic break rules formula or the Break Rules feature.

```
                    Break Alert Report
8/1/2005                                          12:54 PM
 ********************************************************************
                              Clock In                    Time
                                Time:                     Worked:
Server
Hunt, Christy                   8:17a                       4:37
Salazar, Robert                 8:21a                       4:33
===========Threshold=========            4:15
Wilson, Lisa                    8:52a                       4:02

Kitchen
MacElroy, Maddie                7:43a                       5:11
McGrory, Rebecca                8:19a                       4:35
===========Threshold=========            4:15
Little, Donovan                  8:54                       4:00
 ********************************************************************
```

Figure 2-25 Break Alert Report Using Generic Formula

Clock In Time: — Time the employee clocked in for their shift or returned from a break.

Time Worked: — Total amount of continuous hours worked based on the following calculation: Clock In Time + current system time.

=====Threshold====<4:15> — Defined threshold, as defined in Maintenance > Store Settings > Printing > Reports, used to determine when employees are due for a break. Employees that appear above the 'Threshold Line' are overdue for a break. Employees that appear below the 'Threshold Line' have yet to exceed the threshold.

Break Alert Report

8/1/2005 12:02 PM

****

	Clock In Time:	Rest Break due by:	Meal Break due by:
Server			
Hunt, Christy	8:17a	12:17p	2:17p
Salazar, Robert	8:21a	12:21p	2:21p
Wilson, Lisa	8:29a	12:29p	2:29p
Kitchen			
MacElroy, Maddie	7:43a	3:43p	1:43p
McGrory, Rebecca	7:44a	10:44a*	1:44p
Little, Donovan	8:20a	12:20p	2:20p

****

* Indicates an employee is overdue for a rest break or a meal break.

Figure 2-26 Break Alert Report Using Break Rules

Clock In Time: — Time the employee clocked in for their shift or returned from a break.

Rest Break due by: — Time the employee is due to take a rest period break, as defined by the Break Rules feature in Maintenance > Store Settings > Labor group > Breaks.

Meal Break due by: — Time the employee is due to take a meal period break, as defined by the Break Rules feature in Maintenance > Store Settings > Labor group > Breaks.

*** —** Indicates the employee is overdue for a break, based on the Break Rules defined in Maintenance > Store Settings > Labor group > Breaks.

Payment Report

Touch Payments Report on the FOH Reports screen to print the Payment Report. The Payment report lists all payments made with a non-cash tender, such as credit card payments. The report sorts the payments by tender, and lists the total amount of the payment, as well as the tip amount applied to the tender. An ending total is included for each tender, as well as a grand total of all non-cash tenders.

Payment Report

08:04 AM		11/15/99
*** M/C ***		
Joe Smith:		
54198888888888888	4.95	1.00
Smith Total:	4.95	1.00
Sally Jones:		
541977777777777	5.00	1.50
Jones Total:	5.00	1.50
M/C Total:	9.95	2.50
House Acct		
Joe Smith:		
01-M. Davis	55.00	10.00
Smith Total:	55.00	10.00
Sally Jones:		
09-K. Clark	40.95	9.00
Smith Total:	40.95	9.00
House Acct Total:	95.95	19.00
GRAND Total:	109.90	21.50

Figure 2-27 Payments Report

Item Availability Report

Touch Item Availability on the FOH Reports screen to print the Item Availability Report. The report compiles items, which have been marked as unavailable or available with a limited count. If the item is unavailable, the count reports as zero. This report is used with the Item Availability feature.

Item Availability Report

11/15/99	Bar
08:12 AM	
Cranberry Juice	0
Salmon	0
Btl-Merlot	2
Btl-Chardonnay	4

Figure 2-28 Item Availability Report

Drawer Report

Touch Drawer Report on the FOH Reports screen to print the Drawer Payments Report. The report lists all employees assigned to a cash drawer, payments applied on all transactions performed by any person assigned to the drawer, the cash-ins and outs performed on the drawer, and the total amount of cash in the drawer.

```
                Drawer Payments Report
01:37 PM                                11/18/99

Bar 1

Employees:
Sally Jones:

                  ***Payments***
            01 House Acct:                20.00
                  02 Cash:                26.26
            Total Payments:               46.26

Cash In/Outs:
              Charles Davis
                 01:34 PM                 50.00

Total Cash In Drawer:                     76.26
```

Figure 2-29 Drawer Payments Report

Product Mix Report

Touch Product Mix on the FOH Reports screen to display the Product Mix report. The report lists totals generated from all terminals in use and product items sold for the day. This is only one report sortable by either percent, quantity sold, name of the item, or the price of the item. Each view displays the report sorted from the highest number sold to the lowest number sold. The Percent view displays when you access the report.

Product Mix Report

Item	Quantity	Avg Price	Total	Percent
A.F. Opus X	1	$ 35.00	$ 35.00	15.15%
Shrimp Sampler	3	$ 9.25	$ 27.75	12.01%
Marinated Shrimp	3	$ 9.25	$ 27.75	12.01%
Fried Oysters	2	$ 8.95	$ 17.90	7.75%
Lettuce & Tomato Salad	3	$ 5.50	$ 16.50	7.14%
New York Strip Steak	4	$ 3.49	$ 13.95	6.04%
Beefsteak Tomato & Onion	2	$ 6.50	$ 13.00	5.63%
MGG Absolut	2	$ 5.75	$ 11.50	4.98%
Onion Rings	2	$ 5.50	$ 11.00	4.76%
Shrimp Cocktail	5	$ 1.99	$ 9.95	4.31%
Shrimp Remoulade	1	$ 9.25	$ 9.25	4.00%
Apple Pie	2	$ 4.13	$ 8.25	3.57%

Sort: Percent | Quantity | Name | Price

Done | Print

Figure 2-30 Product Mix Report - Percent View

Employee FOH Sales Report

The Employee FOH Sales report is a report viewed by the employee. Access the report using the Sales button on the Working with Tables screen, rather than the FOH Reports screen. Each report is specific to the employee. Any employee responsible for sales can run the Employee Sales report to view the sales specific to them.

The Employee FOH Sales report has five view options: Summary, Sales, Payments, Comps, and Promos.

Summary View

The Summary view appears each time you access the Employee FOH Sales report. The Summary view reports sales, cash owed, and performance measures information for the employee.

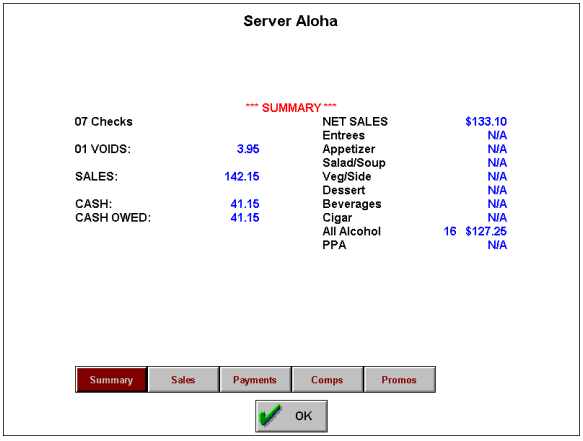


Figure 2-31 Employee FOH Sales Report - Summary View

Guests — Designates the total number of guests entered by the employee, generated from all terminals. (not shown)

Checks — Designates the total number of checks entered by the employee, generated from all terminals.

Get Checks — Designates the total number of checks the employee received using the Get Check feature, generated from all terminals. (not shown)

Voids — Designates the total number of voids and the voided amount, performed under the employee's number.

Sales — Designates the amount of sales generated from the employee from all terminals.

Cash — Designates the cash amount the employee is expected to turn in after removing non-cash payments.

Tip Share — Designates the tip amount the employee is expected to tip out (not shown).

Cash Owed — Designates the total cash amount the employee is expected to turn in after removing non-cash payments and tip share.

Sales View

Touch Sales to display the Sales view. The Sales view reports sales for the employee by sales and retail categories, with an ending total.

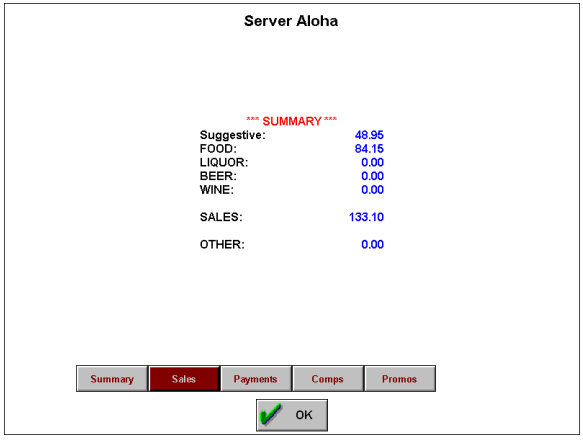


Figure 2-32 Employee FOH Sales Report - Sales View

Payments View

Touch Payments to display the Payments view. The Payments view reports sales by each defined tender.

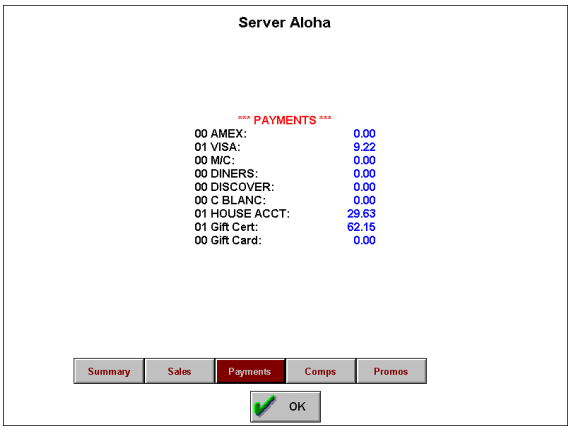


Figure 2-33 Employee FOH Sales Report - Payments View

Comps View

Touch Comps to display the Comps view. The Comps view reports sales by each defined comp.

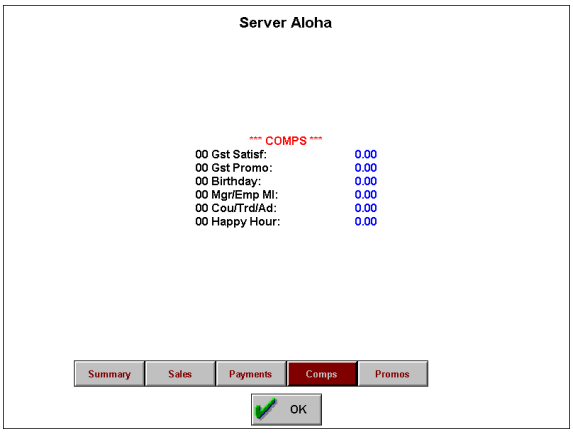


Figure 2-34 Employee FOH Sales Report - Comps View

Promos View

Touch Promos to display the Promos view. The Promos view reports sales by each defined promotion.

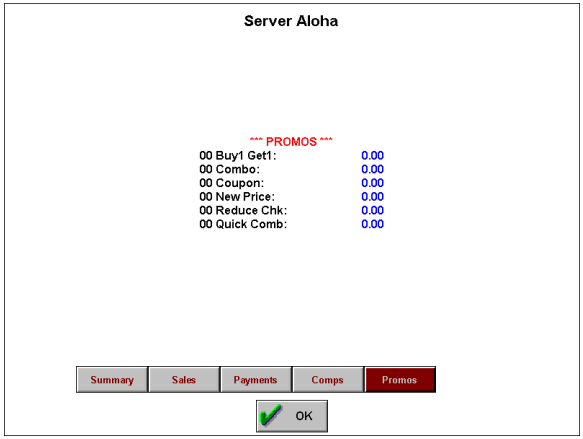


Figure 2-35 Employee FOH Sales Report - Promos View

Analyzing Your BOH Reports

This chapter discusses the reports available from the BOH.

Chapter 3

About Aloha BOH Reports

The Aloha reports provide vital information to aid in operating a successful business. The reports menu, contains selections that provide numerous reporting capabilities for sales, labor, product mix, payments, voids, and auditing.

The Sales, Employee, and Product Mix options include additional menu drop-down choices.

In addition, the Aloha system works with Crystal Report Writer. Crystal Report Writer (CRW) is a third-party software application available from Aloha dealers, and configured to produce custom reports using data from Aloha .DBF files. The Aloha system includes a run-time version of CRW allowing the use of Crystal Report Writer RPT files free of charge.

The report formats are configured by the user and no longer require font selection. Fonts are built in to the system using the True Type capabilities of the Microsoft® Windows operating systems.

Configuring Voids in Gross Sales

Voids are included in gross sales for all FOH and BOH reports. You can configure the system to exclude voids from these reports by selecting the 'Gross Sales Do Not Include Voids' check box in Maintenance > Store Settings > Financials > Reports. If this check box is cleared, all totals for gross sales include voids.

Refer to the Aloha TableService Reference Guide for more information on Store Settings.

Key Benefits of the BOH Aloha Reports

The following is a list of the Aloha reports available to you and their key benefits. Menu options that differ from the report title are indicated in parenthesis:

Sales Report — Displays sales information for all terminals in use for the selected date(s). You can select sales information for a single date, or for a week.

Employee Sales Report (Employee Sales Detail) — Displays sales information for a single employee, or groups of employees.

Sales Comparison Report (Comparative Employee Sales) — Displays sales comparisons between two employees, or groups of employees.

Hourly Sales and Labor Report — Displays sales and labor information for a defined period of time. The information is based on when a guest check is opened.

Sales by Revenue Center Report — Displays sales information for a defined section of the restaurant.

Labor Report — Displays labor information in three separate report options.

Weekly Schedule vs Actual Labor Report — Displays labor information compared to weekly labor schedules. Schedules must be created for the selected week(s) to display accurate information.

Edited Deposits — Displays cash information such as cash drops and cash drop editing.

Overtime Warning Report — Displays labor information for employees reaching overtime.

Employee Breaks Report — Displays labor information for employees that take breaks.

PMix Report (Product Mix) — Displays product information for items sold in your establishment.

Payments Detail Report (Payments) — Displays payment information for all cash and non-cash tender transactions.

Daily Void Report (Voids) — Displays information pertaining to voids performed for the selected date(s).

Surcharge Report — Displays information pertaining to surcharges for the selected date(s).

Emp Performance Measures Report (Performance Measures) — Displays information pertaining to performance measures. Use this report to determine the value and progress of employees.

Audit Report — Displays detailed information on the functions performed from the Front-of-House terminals. User this report to detect theft and for other monitoring purposes.

Back-of-House Security Levels Report (Back-of-House User) — Displays information pertaining to employees accessing the BOH program.

Back-of-House User Security Report — Displays information pertaining to the BOH users' restrictions.

Detailed Access Levels Report — Displays defined access level information and the functions each level can perform.

Some reports are a collection of separate sections that display selected information defined by you using the report settings dialog box. The examples given in this book do not display actual data and are intended to be used as a guide.

In this guide you learn how to:

- Define and prioritize report fields for specific reports.
- Navigate through the Preview Report screen.
- Reprint guest checks and checkout reports by employee, date, etc.
- Create custom reports through Crystal Report Writer.

Common Buttons on the Reports Screen

Located on each of the report configuration dialog boxes are options that provide additional functionality. Click the button if it is available on the report.

Settings Button

If this option is available for the report, click Settings to display the Settings dialog box. Settings are available for most of the reports listed on the Reports menu, and are used for configuring.

Each Settings dialog box displays a list of report fields allowing you to select the fields to include on the report. Others have predefined fields to include on the report. These provide a 'Report Position' which is used to determine whether the field is included on the report, and the order in which the information prints. For example, if 10 different fields print on the report, the field designated as Report Position 1 prints first, the field designated as Report Position 2 prints second, etc. Fields with Report Position 0 (zero) do not display on the report.

View Button

Click View to output and view a report on the screen. After making the report selections and the necessary changes to the report settings, if any, click View. The 'grind' process is implemented on current day reports, and once it is complete, the report detail displays on the screen.

Print Button

Click Print to print a report to the printer instead of displaying it on the screen. After making the report selections and the necessary changes to the report settings, if any, click Print. The 'grind' process is implemented on current day reports, and once it is complete, the report detail prints. The report can also be printed while viewing it on the screen using the Printer button.

Export Button

Click Export to export files for third-party software applications to make the report more portable and configurable. This gives you the ability to search, sort, and filter data for a variety of uses with common programs, such as MSExcel. After making the report selections and the necessary changes to the report settings, if any, click Export. The file is exported and a confirmation message displays.

Export Settings Button

Click Export Settings to export an Aloha report to comma separated (*.csv), text (*.txt), or rich text (*.rtf) formats. Common applications, such as Microsoft Word and Excel use these types of formats. After making the report selections and the necessary changes to the report settings, if any, click Export Settings. Select the file type and path, then click Save.

The default directory for files you export is RptExport. You can change the location to any directory you wish.

Select, Add, and Delete Report Setting

Select saved report settings for an Aloha report for different managerial levels, such as Kitchen Manager, Assistant Manager, and General Manager. A default setting is used. This feature is available for the following reports:

- Sales Report - Summary/Weekly
- Labor Report
- PMix Report - Summary/Weekly

To add a report setting:

1. Click **Add**. The Add New Report Setting dialog box displays, as shown in Figure 3-1:

Figure 3-1 Add New Report Setting Dialog Box

2. Enter a **Name** for the new setting.
3. Select a **saved setting** on which to base the new report setting, or select **None** to start from scratch.

4. Click **OK** to display the Sales Report Settings dialog box, or **Cancel** to end the operation.
5. Make changes to the **setting** as necessary and click **Save**. You are returned to the Sales Report dialog box.

To delete a report setting:

1. Select a **setting** from the **Select Report Setting** drop-down list.
2. Click **Delete**. The Delete report setting confirmation message displays.
3. Click **OK** to delete the report setting, or **Cancel** to end the operation.

Close Button

Click Close to exit the report screen before or after a report has been viewed or printed. When this button is selected, the screen returns to the main menu.

Report Date Selection

Select from the Report Date list box to run the report based on a single date or a range of dates. The list box is located on each of the report configuration dialog boxes. When defining a range of dates, the system automatically includes all dates between the selected beginning and ending dates.

An example of the Preview Report dialog box is shown in Figure 3-2:

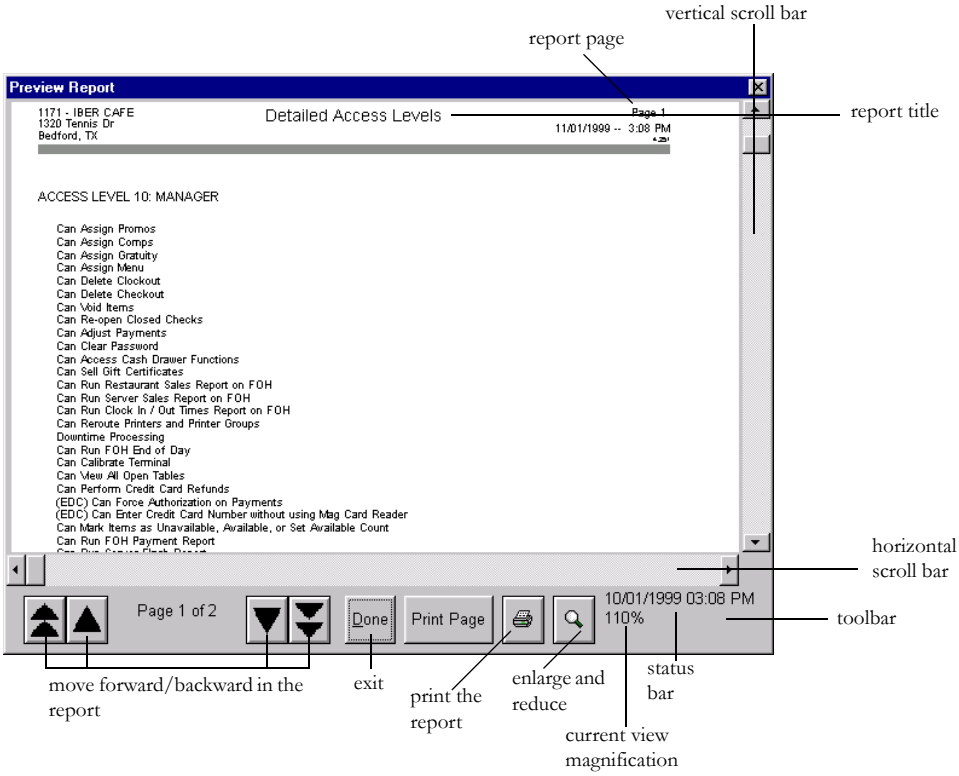


Figure 3-2 Preview Report Dialog Box

The bottom toolbar displays the following buttons:

Displays the first page of the selected report.

Displays the previous page of the selected report.

Displays the next page of the selected report.

Displays the last page of the selected report.

Exits the Preview Report screen without printing the report.

Prints the current page of the selected report.

Prints the entire report.

Enlarges and reduces the selected report.

Sales Reports

The Sales submenu provides reports that pertain to restaurant sales is shown in Figure 3-3:

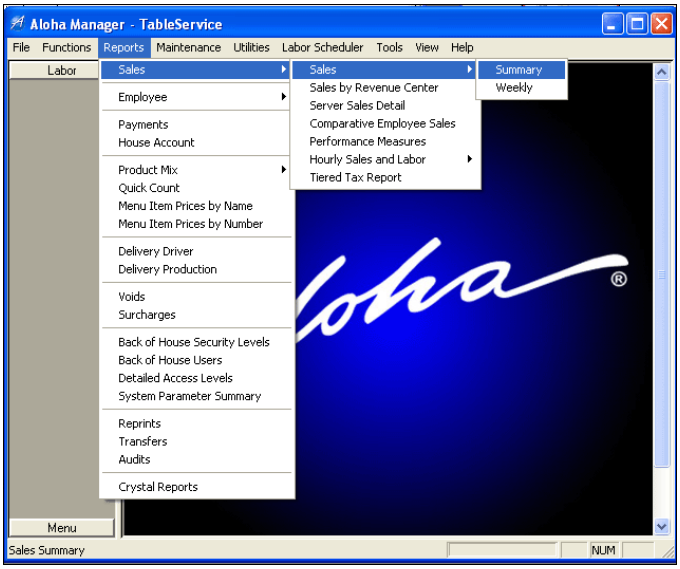


Figure 3-3 Sales Submenu

The reports available from the Sales menu are:

- Sales - Summary
- Sales - Weekly
- Sales by Revenue Center
- Server Sales Detail
- Comparative Employee Sales
- Performance Measures
- Hourly Sales and Labor
- Tiered Tax

Sales Report Summary/Weekly

The Sales report provides sales information by category and the breakdown of payment information by cash, non-cash, promos, gift certificates, etc. It also enables cash deposits to be edited or added. The Sales report is a collection of sections, which are explained in detail. All sections are independent of each other. You define the information to include on the report and the layout.

There are two options for the Sales report:

Summary Sales Report — Displays information for a selected date(s).

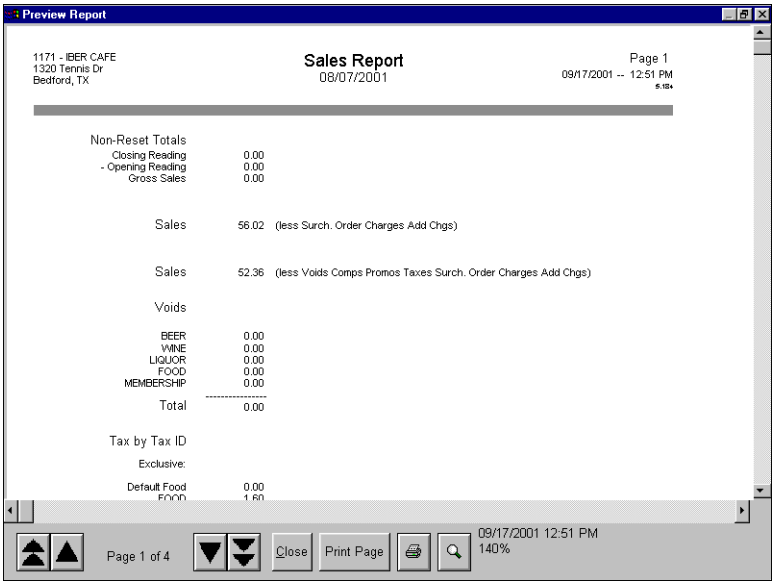
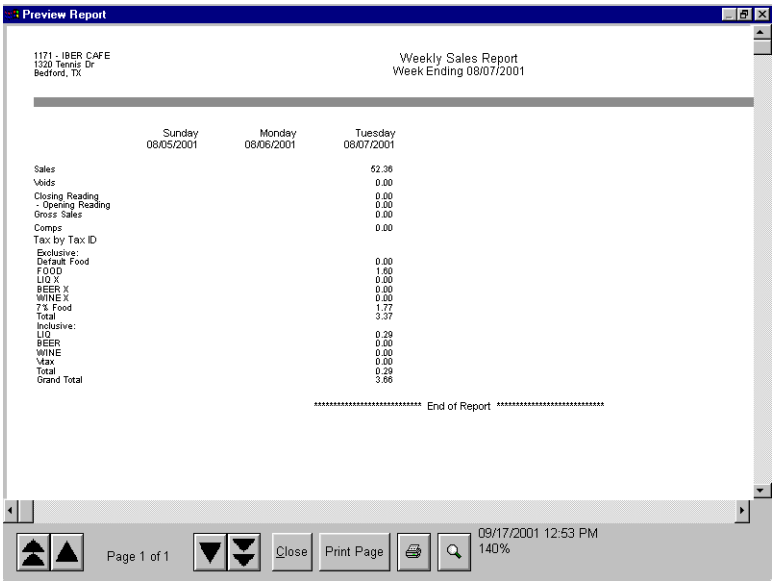


Figure 3-4 Sales Report Summary Preview

Weekly Sales Report — Displays information for a selected week(s).



Preview Report

1171 - IBER CAFE
1320 Tennis Dr
Bedford, TX

Weekly Sales Report
Week Ending 08/07/2001

	Sunday 08/05/2001	Monday 08/06/2001	Tuesday 08/07/2001
Sales			62.36
Voids			0.00
Closing Reading			0.00
- Opening Reading			0.00
Gross Sales			0.00
Comps			0.00
Tax by Tax ID			
Exclusive:			
Default Food			0.00
FOOD			1.60
LIQ X			0.00
BEER X			0.00
WINE X			0.00
7% Food			1.77
Total			3.37
Inclusive:			
LIQ			0.29
BEER			0.00
WINE			0.00
Vtax			0.00
Total			0.29
Grand Total			3.66

********** End of Report **********

Page 1 of 1 Close Print Page 09/17/2001 12:53 PM 140%

Figure 3-5 Sales Report Weekly Preview

Select **Reports > Sales > Sales > Summary** or **Reports > Sales > Sales > Weekly** to access the corresponding report. The Sales Report dialog box appears.

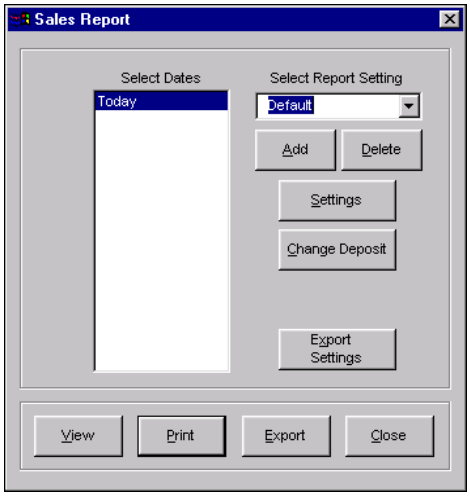


Figure 3-6 Sales Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Settings Button

Click Settings to access the Report Settings dialog box and change the report configuration, if necessary.

Change Deposit Button

Click Change Deposit to enter or edit the daily deposit amount. If there is not a Deposit.txt file available, or deposits have not been made for the day, the Edit Deposits dialog box automatically appears.

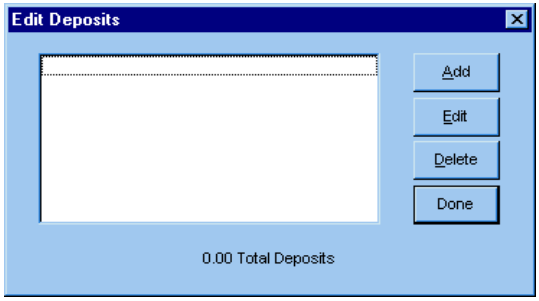


Figure 3-7 Edit Deposit Dialog Box

Select the deposit and click Add, Edit, or Delete. Use the function to determine an over/short condition against the deposit calculated from the FOH sales figures. Existing deposits display in the list box.

Sales Report Settings

Click Settings to open the report configuration dialog box used to control the manner in which the data is printed on the report.

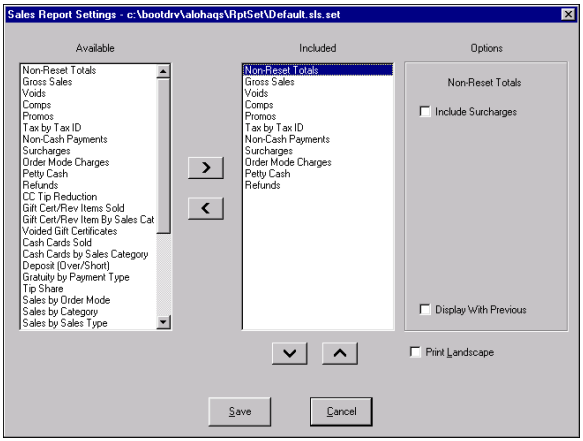


Figure 3-8 Sales Report Settings Dialog Box

Available — Displays the available sections for the Sales report.

Included — Displays the sections included in the Sales report.

Options Group Box

Displays additional options when the section is selected.

> — Includes the section in the report.

< — Excludes the section in the report.

^ — Moves the section up in the order of sections.

V — Moves the section down in the order of sections.

Most sections provide the following check boxes:

Header Text — Provides the ability to title the section with a user-defined heading. The name of the section is used as the default.

Display with Previous — Displays one row sections with the previous section, if room allows. For example, if two sections display a single row of data and are defined together in sequential order, they display side by side.

Print Landscape — Displays the report in landscape format.

Sales Report Sections

The Sales report contains sections that display data reflecting different aspects of your operation. Some sections provide additional check boxes in the Options group box for additional latitude in how the data is printed.

The following sections are available for the Sales report. Each section, and its corresponding option, if any, are explained in detail. The sections are discussed in alphabetical order, not in the order in which they are listed in the dialog box:

Additional Charges Section

The Additional Charges section displays a single-line total amount of additional charges applied to sales. Additional Charges are defined in Store Settings > Financials.

Additional Charges	14.25

Cash Cards by Sales Category Section

The Cash Cards by Sales Category section displays the total amount of cash card sales for each sales and retail category, with an ending total.

Cash Cards by Sales Category

Desserts	0.00
Sundaes	0.00

Total	0.00

Cash Cards Sold Section

The Cash Cards Sold section displays the sales amount of each defined cash card, with an ending total.

Cash Cards Sold

Cash Card	0.00

Total	0.00

Cash Payments Section

The Cash Payments section displays a single-line sales total of payments applied to cash. This includes all tenders that report as cash, such as $1.00 and Next $.

Cash Payments	480.02

Check Count by Day Part Section

The Check Count by Day Part section displays the total number of checks for each defined day part, with an ending total. Day parts are defined in Maintenance > System > Day Parts.

Check Count by Day Part

Breakfast	0
Lunch/Snck	9
Dinner	8
Overnight	5

Total	22

Check Count by Sales Type Section

The Check Count by Sales Type section displays the total number of checks for each defined sales type, or order attribute, with an ending total.

Check Count by Sales Type	
Banquet	51
Cash	14

Total	65

Comps Section

The Comps section displays the comped amount of sales. Comps are defined in Maintenance > Payments > Comps. The Quantity column does not appear on the BOH Sales Weekly report.

Total Only — Displays the total comped amount of sales.

Comp Total	Qty	Amount
	4	15.99

List All — Displays the comped amount for each defined comp, with an ending total. This section could be long depending on the number of defined comps.

Comps	Qty	Amount
Mgr Comp	1	4.00
VIP	0	0.00
Emp Meal	1	2.39
Open %	2	9.00
Total	4	15.99

List All with Values — Displays the comped amount for applied comps only, with an ending total. Comps with a $0.00 balance do not display.

Comps	Qty	Amount
Mgr Comp	1	4.00
Emp Meal	1	2.39
Open %	2	9.00
Total	4	15.99

Credit Card Tip Reduction Section

The Credit Card Tip Reduction section displays the total amount of sales from the percentage charged to the employee for processing the tip or auto gratuity portion. The charge back is only applied to the tip/auto gratuity portion, not the sales amount. This section is also referred to as 'Tip Refund' and the percentage is defined in the 'Tip Refund %' text box in Maintenance > Payments > Tenders.

Credit Card Tip Reduction	6.00

Deposit (Over/Short) Section

The Deposit (Over/Short) section displays the total amount of calculated cash, deposits entered or dropped, and the over/short total for the selected date of business. If the report uses a range of dates, only the calculated cash line displays. The total deposit and over/short fields do not display.

Deposit (calculated)	365.01
Deposit: Drop	500.00

Deposit O/S	134.99

The formula for calculated cash is based on the following calculation: closed sales + taxes + surcharges + order mode charges + tip refunds + gift certificates sold + cash cards sold + petty cash transactions (if the account affects the deposit) + additional charges - non-cash tenders (if the tender affects the deposit) - comps - promos - non-collected delivery fees - petty cash transactions (if the account does not affect the deposit). Cash calculated is the expected cash in the drawer without non-cash payments.

Deposits are the total value of entries made with the BOH Edit Deposits function. The Over/Short formula is based on the following calculation: calculated cash - deposits. Negative amounts display in ( ).

Show 'Affects Deposit' Detail — Displays the total over/short amount of each tender with the 'Affects Deposit' check box selected, with an ending total.

Deposit (calculated)	
Cash	10.00
Travelers Checks	5.00

Total	15.00
Deposit: Drop	14.00
Deposit O/S	(1.00)

When you run the Weekly Sales report, the section displays by the days of the week.

	Sunday	Monday
	05/06/2001	05/07/2001
Deposit (calculated)		
Cash	10.00	12.00
Travelers Checks	5.00	0.00
	---	---
Total	15.00	12.00
Deposit: Drop	14.00	11.00
Deposit O/S	(1.00)	(1.00)

List by 'Report As' — Displays the total over/short amount of each tender with the 'Affects Deposit' check box selected, sorted by the 'Report As' option selected for the tender.

Show Deposit Detail — Displays the total amount of each deposit, with an ending total.

Deposit (calculated)	1145.98
Deposit: Lunch	600.00
Deposit: Dinner	546.05

Deposit O/S	.07

When you run the report for multiple days, the section displays the total amount for each day.

Deposit (calculated)	1145.98
Deposit: 08/08/2001	600.00
Deposit: 08/09/2001	546.05

Deposit O/S	.07

The 'Show Deposit Detail' option is not available when running the Weekly Sales report.

Delivery Section

The Delivery section displays detailed delivery information such as total number of runs and orders, total amount of sales, driver fees, etc. This section displays only if the Delivery/Frequent Buyer product is in use.

Delivery

Runs	5
Orders	5
Sales	35.00
Driver Fees	3.50
Average Order	7.00
(% of Total Sales)	10%

Employee Over/Short Section

The Employee Over/Short section displays the excess or shortage amount of the cash owed and collected for each employee who performed a checkout, with an ending total, based on the following calculation: declared cash - calculated cash. Only job codes with ‘Must Declare Cash’ shows over/short figures.

Employee Over/Short

Employee	Amount
Doe, John	-0.14
Drawer 2	4.29

Total	4.15

Exempt Taxables Section

The Exempt Taxables section displays the total tax exempt sales for each Tax ID, with an ending total.

Exempt Taxables

Food	2.00
Alcohol	3.50
No Tax	0.50

Total	6.00

Gift Certificates/Revenue Item Sold Section

The Gift Certificates/Revenue Item Sold section displays a single-line gift certificates and revenue items with an applied order mode.

Gift Certs Sold	650.00

Show Detail — Displays the sales total for each defined gift certificates with an ending total.

Gift Certs Sold	
$50.00	50.00
$100.00	0.00
Deposit $100	100.00
Deposit Cater	500.00

Total	650.00

Gift Certificate/Revenue Item by Sales Category Section

The Gift Certificates/Revenue Item by Sales Category section displays the total amount of gift certificate/revenue item for each sales and retail category, with an ending total.

Gift Certs by Sls Cat	
Food	600.00
Retail	50.00

Total	650.00

Gratuity by Payment Type Section

The Gratuity by Payment Type section displays a single-line total of gratuity sales.

Show Detail — Displays gratuity information for each cash and non-cash payment, with an ending total.

The Gratuity by Payment Type section contains the following columns:

Amount — Displays the total amount of sales with charge tips and auto gratuity.

Charge Tips — Displays the total amount of charge tips applied to transactions.

Auto Gratuity — Displays the total amount of automatic gratuity charges applied to transactions.

Sales — Displays the sales amount without charge tips and auto gratuity.

Deferred Tips — Displays the sales amount of tips, which are distributed at a later date. Deferred tips are usually posted and paid on a later pay period. This total does not calculate with other fields in this section and used as a reference.

Guest Count by Day Part Section

The Guest Count by Day Part section displays the total number of guests for each defined day part, with an ending total. Day parts are defined in Maintenance > System > Day Parts.

Guest Count by Day Part

Breakfast	0
Lunch/Snck	9
Dinner	8
Overnight	5

Total	22

Guest Count by Order Mode Section

The Guest Count by Order Mode section displays the total number of guests for each order mode, with an ending total.

Guest Count by Order Mode

Dine In	14
To Go	53
Drive Thru	7

Total	74

Guest Count by Sales Type Section

The Guest Count by Sales Type section displays the total number of guests for each defined sales type, or order attribute, with an ending total.

Guest Count by Sales Type

Banquet	51
Cash	14

Total	65

Non-Cash Payments Section

The Non-Cash section displays the sales amount applied with tenders other than cash. For example, a credit card payment is a non-cash payment. Non-cash tenders are defined in Maintenance > Payments > Tenders. The Quantity column does not appear on the BOH Sales Weekly report.

Total Only — Displays the total sales amount applied with non-cash payments.

Non-Cash Payments Total	3	48.17

List All — Displays the total amount for each defined non-cash payment, with an ending total.

Non-Cash Payments	Qty	Amount
Gift Cert	0	0.00
Branded	2	18.22
Wholesale	1	4.98
Visa	0	0.00
Total	3	48.17

List All with Values — Displays the total amount for applied non-cash payments only, with an ending total. Payments with a $0.00 balance do not display.

Non-Cash Payments	Qty	Amount
Branded	2	38.22
Wholesale	1	4.98
Total	3	48.17

Show Gratuity — Displays the sales and gratuity breakdown of each non-cash payment type, with an ending total. Columns ‘Amount’, ‘Charge Tip’, ‘Auto Gratuity’ and ‘Sales’ are added to the section.

Non-Reset Totals Section

The Non-Reset Totals section displays the opening and closing reading totals for the register, with an ending gross total. Closing reading is the total of gross sales up to and including the most current selected date before grind. Opening reading is the total of gross sales up to and including the earliest selected date before grind.

Select ‘Use Non-Reset Totals’ in Maintenance > Store Settings > Security > POS Security in conjunction with this section.

Closing Reading	203.20
-Opening Reading	203.20
Gross Sales	0.00

Include Surcharges — Includes surcharges in the sales figures.

Order Mode Charges Section

The Order Mode Charges section displays a single-line sales total for charges associated with each defined order mode. For example, if a $0.30 charge is added to all to go orders, $0.30 is added to the total for each transaction closed with a to go order mode. Order modes are defined in Maintenance > System > Order Modes.

Order Mode Charges	4.18

Petty Cash Section

The Petty Cash section displays a single-line total amount applied to petty cash accounts. Petty Cash accounts defined with the 'Affect Deposits' check box selected, does not calculate in the section.

Petty Cash	14.21

Show Detail — Displays totals for each defined petty cash account, even if the account did not have any transactions, with an ending total.

Petty Cash	
Supplies	10.00
Paidouts	4.21
Cake Deposit	0.00

Total:	14.21

Promos Section

The Promos section displays the discount amount from promotions based on the following calculation: item sales price - promotional price. Promos are defined in Maintenance > Payments > Promotions. The Quantity column does not appear on the BOH Sales Weekly report.

Total Only — Displays the total savings amount of promotions.

Promo Total	2	2.30

List All — Displays the discount amount from each defined promo, with an ending total. This section could be long, depending on the number of defined promotions.

Promo	Qty	Amount
$.99 Single	1	0.80
Burger Deal	1	1.50
Free Dessert	0	0.00
Total	2	2.30

List All with Values — Displays the discount amount for applied promos only, with an ending total. Promos with a $0.00 balance do not display.

Promo		
$.99 Single	1	0.80
Burger Deal	1	1.50
Total	2	2.30

Refunds Section

The Refunds section displays a single-line sales total of transactions applied with a refund.

Refund Total	25.00

Show Detail — Displays refund detail for each defined payment type for the tender, even if the total is zero. For example, if the original check is closed to a personal check, the refund amount displays under Check Refunds.

Refunds	
Cash Refunds	15.15
Non-Cash Refunds	6.00

Total	21.15

Sales Section

The Sales section displays a single-line sales total based on the menu item price and the options available for the section. The figure does not include refunds. If any of the following check boxes are not selected, they are indicated as ‘less’ in the header. For example, if Include Comps is not selected, the sales line displays, ‘Grs Sls less Comps’.

Sales is generated from orders sent manually by selecting an order mode or sent automatically. When running in a 24-hour operation, sales is generated from orders closed.

Grs Sls	413.98

Include Voids — Includes voids in the section. This option is disabled when you select ‘Gross Sales Do Not Include Voids’ in Maintenance > Store Settings > Financials > Reports.

Include Comps — Includes comps in the section.

Include Promos — Includes promos in the section.

Include Taxes — Includes taxes in the section.

Include Surcharges — Includes surcharges in the section.

Include Order Charges — Includes applied order mode charges in the section.

Include Additional Charges — Includes additional charges added to transactions.

Do Not Display Descriptors — Does not display ‘less’ indicators for any cleared check box for the section.

Sales by Category Section

The Sales by Category section displays sales information for categories by net sales, comps, promos, taxes, and gross sales. Categories are defined in Maintenance > Menu > Categories.

Total Only — Displays a single-line sales total.

List All — Displays a sales total for each defined category.

List All with Values — Displays a sales total for each defined category to which transactions were applied. Categories which did not have transactions, do not display.

The Sales by Category section contains the following columns:

Net Sls — Displays the total sales from menu items only.

Comps — Displays the total value of discount amounts applied to sales. For example, if 10% is discounted from a $5.00 check, $0.50 is added to the Comps column.

To remove this column and have comps included in the Net Sales column, set the NETHASCOMPS variable to TRUE in Aloha.ini.

Promos — Displays the total value of the coupon amounts applied to sales. For example, if a $0.99 Sundae promo is applied to a sundae at a regular price of $1.49, $0.50 is added to the Promos column.

To remove this column and have promos included in the Net Sales column, set the NETHASPROMOS variable to TRUE in Aloha.ini.

Taxes — Displays the total value of both inclusive and exclusive tax amounts applied to the sale.

Gross Sales — Displays the total sales of all columns based on the following calculation: net sales + comps + promos + taxes.

Sales by Concept Section

The Sales by Concept section displays the quantity of items sold and sales amount for items assigned to a particular concept, with an ending total. Items not assigned to a concept are considered ‘common’.

Sales by Concept

	Quantity	Amount
Concept A	6	40.00
Concept B	8	60.00
Common	14	100.00
	---	---
Total	28	200.00

Distribute Common — Divides common items according to the distribution percentages defined in Maintenance > System > Concepts. Common refers to items which are not dedicated to a particular concept and shared across all concepts.

Straight Sales — Displays sales based on the original item price before you apply a comp or a promotion. Straight sales also include inclusive taxes.

Net Sales — Displays sales based on the following calculation: straight sales - inclusive taxes - comps (if you select ‘Include Comps in Net Sales’)- promos (if you select ‘Include Promos in Net Sales’).

Sales by Day Part by Category Section

The Sales by Day Part by Category section displays net sales for each sales and retail category by period, with an ending total. Day parts are defined in Maintenance > System > Day Parts.

Sales by Day Part by Category

	Breakfast	Lunch	Dinner
Food	100.00	200.00	300.00
Drinks	20.00	40.00	60.00
Misc	200.00	300.00	400.00
	---	---	---
Totals	320.00	540.00	760.00

Display Averages — Generates and displays the following averages for each day part:

- Check Average based on the following calculation: net sales per day part ÷ number of checks per day part.
- Guest Average based on the following calculation: net sales per day part ÷ number of guests per day part.
- Avg Guests/Check based on the following calculation: number of guest per day part ÷ number of checks per day part.

	Breakfast	Lunch	Dinner
Check Avg	5.18	8.25	5.83
Guest Avg	4.75	5.50	5.25
Avg Guests/ Check	1.09	1.50	1.11

Sales by Order Mode Section

The Sales by Order Mode section displays sales reported for each defined order mode, with an ending total. For example, if a check is closed with a Drive-Thru order mode, the check amount is added to the Drive-Thru total.

Order Mode Sales

To Go	5200.00
Dine In	1850.00
Drive-Thru	1200.00

Total:	8250.00

Display Averages — Generates and displays the following averages for each order mode:

- Check Average based on the following calculation: net sales per day part ÷ number of checks per order mode.
- Guest Average based on the following calculation: net sales per day part ÷ number of guests per order mode.
- Avg Guests/Check based on the following calculation: number of guest per day part ÷ number of checks per order mode.

Order Mode Sales	Net Sales	Check Avg	Guest Avg
To Go	5200.00	9.04	4.91
Dine In	1850.00	9.25	9.25
Drive Thru	1200.00	8.57	8.57
	---	---	---
Total	8250.00	9.01	5.89

Sales by Sales Type Section

The Sales by Sales Type section displays sales information for sales types, or order attributes, by net sales, comps, promos, taxes, and gross sales.

Total Only — Displays a single-line sales total.

List All — Displays sales totals for each defined sales type.

List All with Values — Displays sales totals for each defined sales type to which transactions were applied. Sales Types without applied transactions do not display.

The Sales by Sales Type section contains the following columns:

Net Sls — Displays the total sales from menu items only.

Comps — Displays the total value of discount amounts applied to sales. For example, if 10% is discounted from a $5.00 check, $0.50 is added to the Comps column.

To remove this column and have comps included in the Net Sales column, set the NETHASCOMPS variable to TRUE in Aloha.ini.

Promos — Displays the total value of the coupon amounts applied to sales. For example, if a $0.99 Sundae promo is applied to a sundae at a regular price of $1.49, $0.50 is added to the Promos column.

To remove this column and have promos included in the Net Sales column, set the NETHASPROMOS variable to TRUE in Aloha.ini.

Taxes — Displays the total value of both inclusive and exclusive tax amounts applied to the sale.

Gross Sales — Displays the total sales of all columns based on the following calculation: net sales + comps + promos + taxes.

Surcharges Section

The Surcharges section displays a single-line sales total for surcharges and collected surcharges. The Surcharges Total line includes any surcharge with the 'Guest Always Pays' check box cleared. The Surcharges Collected line includes any surcharge with the 'Guest Always Pays' check box selected.

Surcharges Total	8.50
Surcharges Collected	7.10

Tax by Tax ID Section

The Tax by Tax ID section displays amounts from each defined exclusive and inclusive tax, with an ending total. For example, if a check is closed with tax exemption, the check amount is added to the Tax Exempt total.

Exclusive	
Non-Taxable	42.91
Food Tax-1	21.54
Food Tax-2	0.00
Tax Exempt	18.30
Inclusive	

Total:	82.75

Tip Share Section

The Tip Share section displays a single-line total amount of tips applied to transactions.

Vizor Section

The Vizor section displays a single line total amount of contributions made by the employee participating in the VizorVest mutual fund program. It also displays the additional cash owed amount from the employee only when the store collects tips.

Total Vizor	25.00
Vizor Cash Owed	5.00

Voided Gift Certificates Section

The Voided Gift Certificates section displays a single-line total value of gift certificates/revenue items void from transactions.

Voids Section

The Voids section displays a single-line total of voids applied to transactions.

Voids Total	21.80

Show Detail — Displays void detail for each sales and retail category, with an ending total, rather than just a combined summary of the categories.

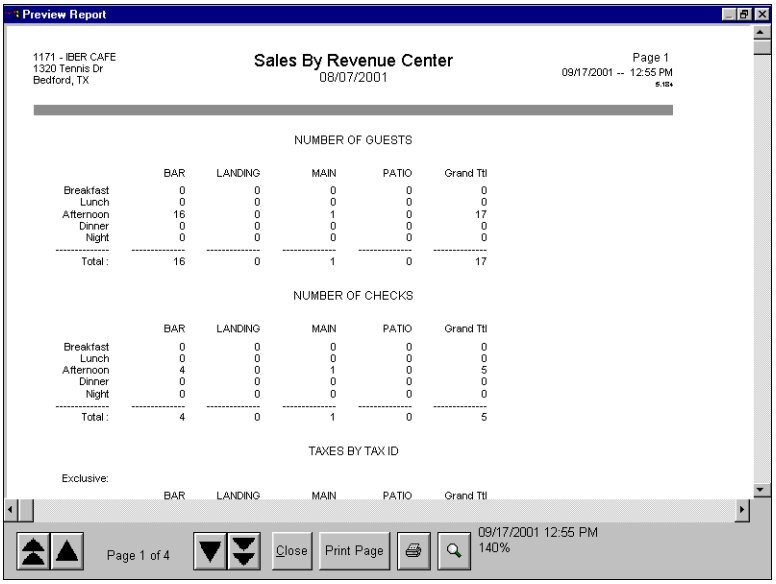
Voids

Sundaes	5.49
Beverages	0.69
Party	15.62

Total	21.80

Sales by Revenue Center Report

The Sales by Revenue Center report provides sales information by category for each revenue center, as well as number of guests, number of checks, payment information, comps, promos, tips, auto gratuities, and more. The Sales by Revenue Center report is a collection of sections, which are explained in detail. All sections are independent of each other. You define the information to include on the report and the layout. The report displays as shown in Figure 3-9:



Preview Report

1171 - IBER CAFE
1320 Tennis Dr
Bedford, TX

Sales By Revenue Center
08/07/2001

Page 1
09/17/2001 -- 12:55 PM

NUMBER OF GUESTS

	BAR	LANDING	MAIN	PATIO	Grand Ttl
Breakfast	0	0	0	0	0
Lunch	0	0	0	0	0
Afternoon	16	0	1	0	17
Dinner	0	0	0	0	0
Night	0	0	0	0	0
Total :	16	0	1	0	17

NUMBER OF CHECKS

	BAR	LANDING	MAIN	PATIO	Grand Ttl
Breakfast	0	0	0	0	0
Lunch	0	0	0	0	0
Afternoon	4	0	1	0	5
Dinner	0	0	0	0	0
Night	0	0	0	0	0
Total :	4	0	1	0	5

TAXES BY TAX ID

Exclusive:

	BAR	LANDING	MAIN	PATIO	Grand Ttl

Page 1 of 4 Close Print Page 09/17/2001 12:55 PM 140%

Figure 3-9 Sales by Revenue Center Preview

Select Reports > Sales > Sales by Revenue Center. The Sales by Revenue Center Report dialog box appears.

Figure 3-10 Sales By Revenue Center Dialog Box

Select a single date, or a range of dates from the selection list.

Sales by Revenue Report Settings

Click Settings to open the Sales by Revenue Center Report Settings dialog box shown in Figure 3-11, used to control the manner in which the data is printed on the report:

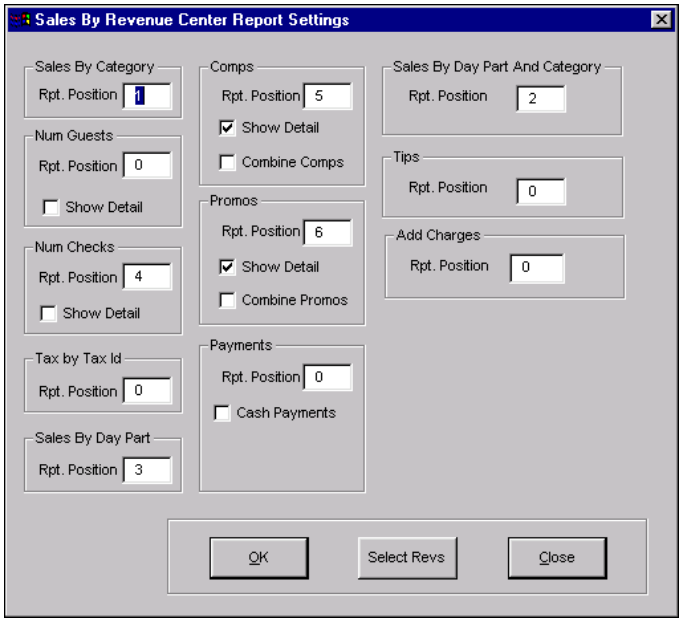


Figure 3-11 Sales by Revenue Center Report Settings

The Sales by Revenue Center report contains sections with data reflecting different aspects of your operation. Some sections provide check boxes for additional latitude in how data for the selected report field is printed.

Sales by Category Section

The Sales by Category section displays net sales totals for each sales and retail category, by revenue center, with an ending total.

Net Sales by Category

	Front Room	Counter	Total
Entrees	1850.20	500.00	2350.20
Sides	505.00	10.00	515.00
	---	---	---
Total	2355.20	510.00	2865.20

Num Guests Section

The Num Guests section displays a single-line total number of guests for each revenue center.

Number of Guests

	Front Room	Counter	Total
Total Guests	47	15	62

Show Detail — Displays the total number of guests by day part for the defined revenue center, with an ending total.

Number or Guests

	Front Room	Counter	Total
Breakfast	14	3	17
Lunch	33	12	45
	---	---	---
Total	47	15	62

Num Checks Section

The Num Checks section displays a single-line total number guest checks for each revenue center.

Number of Checks

	Front Room	Counter	Total
Total Guests	15	21	36

Show Detail — Displays the total number of checks by day part for the defined revenue center, with an ending total.

Number of Checks

	Front Room	Counter	Total
Breakfast	8	10	18
Lunch	7	11	18
	---	---	---
Total	15	21	36

Tax by Tax ID Section

The Tax by Tax ID section displays totals for each exclusive and inclusive tax, by revenue center, with an ending total.

Tax by Tax ID

	Front Room	Counter	Total
Food Tax	12.01	22.50	34.51
Alcohol Tax	5.70	18.00	23.70
	---	---	---
Total	17.71	40.50	58.21

Sales by Day Part Section

The Sales by Day Part section displays net sales totals for each defined day part, by revenue center, with an ending total.

Sales by Day Part

	Front Room	Counter	Total
Breakfast	520.00	620.00	1140.00
Lunch	1100.00	800.00	1900.00
	---	---	---
Total	1620.00	1420.00	3040.00

Comps Section

The Comps section displays a single-line total for the comped amount of sales, by revenue center. Comps are defined in Maintenance > Payments > Comps.

Comps

	Front Room	Counter	Total
Comp Total	0.00	5.00	5.00

Show Detail — Displays the comped amount of sales from each defined comp, with an ending total.

Comps

	Front Room	Counter	Total
MGR Comp	0.00	5.00	5.00
Emp Meal	0.00	0.00	0.00
	---	---	---
Comp Total	0.00	5.00	5.00

Combine Comps — Displays the comped amount of sales for applied comps only. Comps with $0.00 balance do not display.

Comps

	Front Room	Counter	Total
MGR Comp	0.00	5.00	5.00
	---	---	---
Comp Total	0.00	5.00	5.00

Promos Section

The Promos section displays the sales amount from promotions based on the following calculation: item sales price - promotional price. Promos are defined in Maintenance > Payments > Promotions.

Promos

	Front Room	Counter	Total
Promo Total	0.00	18.50	18.50

Show Detail — Displays the sales amount from each defined promo, with an ending total.

Promos

	Front Room	Counter	Total
BOGO	0.00	18.50	18.50
Quick Combo	0.00	0.00	0.00
	---	---	---
Promo Total	0.00	18.50	18.50

Combine Promos — Displays the sales amount for applied promotions only. Promotions with $0.00 balance do not display.

Promos

	Front Room	Counter	Total
BOGO	0.00	18.50	18.50
	---	---	---
Promo Total	0.00	18.50	18.50

Payments Section

The Payments section displays the sales total, by revenue center, for each defined non-cash tender type, with an ending total. Payments with $0.00 balance display also. Payments are defined in Maintenance > Payments > Tenders.

Payments

	Front Room	Counter	Total
MC	15.00	2.00	17.00
Check	0.00	0.00	0.00
	---	---	---
Payments Total	15.00	2.00	17.00

Cash Payments — Displays cash sales for each revenue center.

	Front Room	Counter	Total
Cash	51.00	10.00	61.00

Sales by Day Part and Category Section

The Sales by Day Part and Category section displays net sales totals for all sales and retail categories by day part. with an ending total. A section prints for each defined revenue center. This section can be long, depending on the number of defined revenue centers.

Net Sales for Revenue Center Front Room

	Breakfast	Lunch	Total
Cones	10.00	50.00	60.00
Scoops	40.00	50.00	90.00
	---	---	---
Total	50.00	100.00	150.00

Tips Section

The Tips section displays net sales for all tenders defined as ‘tippable’, separated by day part, with an ending total. A separate section displays for all auto gratuity sales. A section displays for each defined revenue center. This section could be long depending on the number of revenue centers.

Tips for Revenue Center Front Room

	Breakfast	Lunch	Total
Cones	0.00	0.00	0.00
Scoops	0.00	0.00	0.00
	---	---	---
Total	0.00	0.00	0.00

Add Charges Section

The Add Charges section displays additional charges for each revenue center, with an ending total.

Additional Charges

	Front Room	Counter	Total
Cover	0.00	0.00	0.00
	---	---	---
Additional Charges Total	0.00	18.50	18.50

Select Revs Button

Click Select Revs to filter the report by a specific revenue center(s).

To select the revenue centers to include in the report:

1. Click **Select Revs**. The Limit Which Revenue Centers to Report dialog box appears.

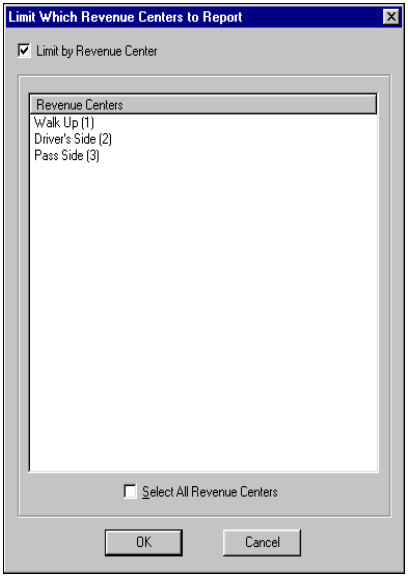
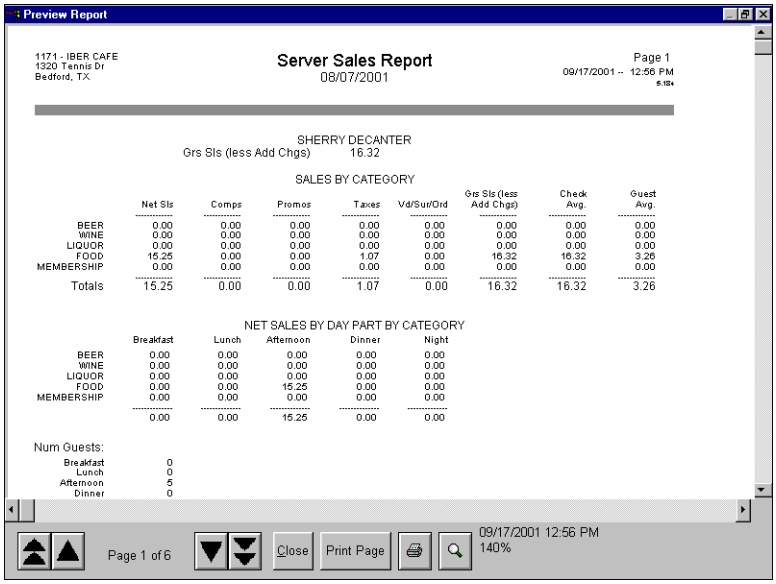


Figure 3-12 Limit Which Revenue Center to Report Dialog Box

2. Select **Limit by Revenue Center**.
3. Click each **revenue center(s)** until all necessary revenue centers are selected, or select the **Select All Revenue Centers** check box to include all revenue centers.
4. Click **OK**.

Server Sales Detail Report

The Server Sales Detail report contains sales information based on an individual employee, or all employees who logged in to the system and rang sales. If generic employees are configured by shift, such as Cashier PM-1, use the report to report by shift, and not employees. The Employee Sales report is a collection of sections, which are independent of each other. You define the information to include on the report and the layout. The report displays as shown in Figure 3-13:



Preview Report

1171 - IBER CAFE
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Server Sales Report
08/07/2001

Page 1
09/17/2001 -- 12:56 PM
6.18.4

SHERRY DECANTER
Grs Sls (less Add Chgs) 16.32

SALES BY CATEGORY

	Net Sls	Comps	Promos	Taxes	Vd/Sur/Ord	Grs Sls (less Add Chgs)	Check Avg.	Guest Avg.
BEER	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WINE	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
LIQUOR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FOOD	15.25	0.00	0.00	1.07	0.00	16.32	16.32	3.26
MEMBERSHIP	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals	15.25	0.00	0.00	1.07	0.00	16.32	16.32	3.26

NET SALES BY DAY PART BY CATEGORY

	Breakfast	Lunch	Afternoon	Dinner	Night
BEER	0.00	0.00	0.00	0.00	0.00
WINE	0.00	0.00	0.00	0.00	0.00
LIQUOR	0.00	0.00	0.00	0.00	0.00
FOOD	0.00	0.00	15.25	0.00	0.00
MEMBERSHIP	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	15.25	0.00	0.00

Num Guests:

Breakfast	0
Lunch	0
Afternoon	5
Dinner	0

Page 1 of 6 Close Print Page 09/17/2001 12:56 PM 140%

Figure 3-13 Server Sales Detail Report Preview

Select Reports > Sales > Server Sales Detail Report. The Employee Sales Report dialog box appears.

Figure 3-14 Employee Sales Report Dialog Box

Select a single date, or a range of dates, from the selection list. Select an employee from the employee list or select 'Select All Employees' to include sales information for all employees.

Select All Employees — Includes all employees in the report. Select this instead of selecting each individual employee.

Server Sales Detail Report Settings

Click Settings to open the Employee Cash Report Settings dialog box used to control the manner in which the data is arranged on the report.

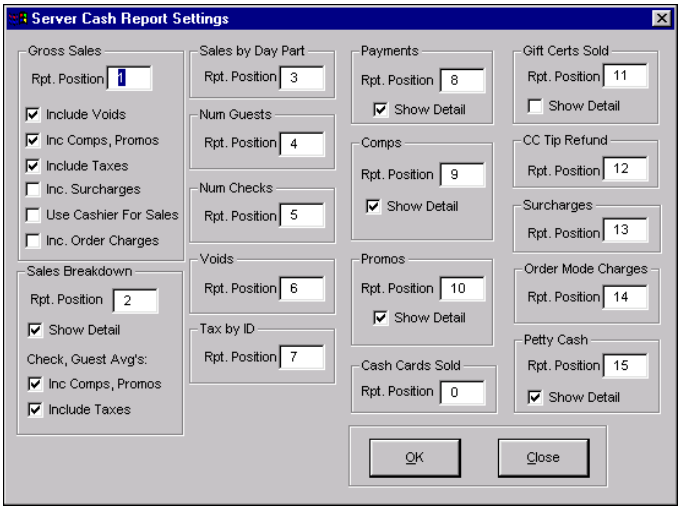


Figure 3-15 Employee Cash Report Settings Dialog Box

The Server Sales Detail report contains sections that display data reflecting different aspects of your operation. Some sections provide check boxes for additional latitude in how data for the selected report field is printed.

Gross Sales Section

The Gross Sales section displays a single-line sales total based on the menu item price and the options available for the section. The figure does not include refunds. If any of the following check boxes are not selected, they are indicated as ‘less’ in the header. For example, if Include Comps is not selected, the sales line displays, ‘Grs Sls less Comps’.

Grs Sls 413.98

Include Voids — Includes voids in the section. This option is disabled when you select ‘Gross Sales Do Not Include Voids’ in Maintenance > Store Settings > Financials > Reports.

Include Comps — Includes comps in the section.

Include Promos — Includes promos in the section.

Include Taxes — Includes taxes in the section.

Include Surcharges — Includes surcharges in the section.

Use Cashier for Sales — Adds the sale to the total sales of the cashier. If not selected, the sale is added to the total sales for the employee who keeps the tip. This check box should be set if one employee serves and keeps the tip, but another employee actually collects the payment. In this situation, each employee's sales report and checkout report amounts will match.

Include Order Charges — Includes applied order mode charges in the section.

Sales By Category Section

The Sales By Category section displays a single-line sales total for each sales and retail category. This section displays for each employee.

Sales by Category

	Net Sls	Comps	Promos	Taxes	Grs Sls (less (n))
Total	26.00	1.00	5.00	2.50	34.50

Show Detail — Displays net sales for each sales and retail category, with an ending total.

Sales by Category

	Net Sls	Comps	Promos	Taxes	Grs Sls (less (n))
Entrees	18.00	0.00	5.00	2.00	25.00
Sides	8.00	1.00	0.00	0.50	9.50
	---	---	---	---	---
Total	26.00	1.00	5.00	2.50	34.50

Check, Guest Avg's Include Comps/Promos — Includes comps and promotions in the check and guest average calculation. Check average is based on the following calculation: sales + comps + promos / total of all checks. Guest average is based on the following calculation: sales + comps + promos / total of all guests.

Sales by Category

	Check Avg	Guest Avg
Entrees	4.60	4.60
Sides	1.50	1.50

Check, Guest Avg's Include Taxes — Includes taxes in the check and guest average calculation. Check average is based on the following calculation: sales + inclusive tax + exclusive tax / total of all checks. Guest average is based on the following calculation: sales + inclusive tax + exclusive tax / total of all guests.

Sales by Category

	Check Avg	Guest Avg
Entrees	3.33	3.33
Sides	1.42	1.42

The Sales By Category report section contains the following columns:

Net Sls — Displays the total sales from menu items only, deducting comps, promos, taxes, voids, and refunds/overrings.

Comps — Displays the total value of discount amounts applied to sales. For example, if 10% is discounted from a $5.00 check, $0.50 is added to the Comps column.

Promos — Displays the total value of the coupon amounts applied to sales. For example, if a $0.99 promo is applied to an item at a regular price of $1.49, $0.50 is added to the Promos column.

Taxes — Displays the total value of both inclusive and exclusive tax amounts applied to the sale.

Gross Sales — Displays the total sales of all columns based on the following calculation: net sales + comps + promos + taxes.

Check Average — Displays the calculated check average based on the following calculation: net sales ÷ total of all checks.

Guest Average — Displays the calculated guest average based on the following calculation: net sales ÷ total of all guests.

Sales by Day Part Section

The Sales by Day Part section displays net sales for each sales and retail category, by day part, with an ending total. The section displays for each employee.

Net Sales by Day Part by Category

	Breakfast	Lunch	Total
Beverages	42.00	514.00	556.00
Desserts	14.00	22.00	36.00
	---	---	---
Total	56.00	536.00	592.00

Num Guests Section

The Num Guests section displays the total number of guests for each defined period, with an ending total. This section displays for each employee. Use this section to determine the employee who served the most guests.

Number of Guests

Breakfast	5
Lunch	50
Dinner	70

Total	125

Num Checks Section

The Num Checks section displays the total number of checks for each defined period, with an ending total. This section displays for each employee. Use this section to determine the employee who opened the most checks.

Number of Checks	
Breakfast	5
Lunch	50
Dinner	70

Total	125

Voids Section

The Voids section displays a single-line total amount of voids performed while the employee is logged in. This section displays for each employee.

Voids	14.00

Tax by Tax ID Section

The Tax by Tax ID section displays totals from each defined exclusive and inclusive tax, with an ending total. This section displays for each employee. For example, if a check is closed with tax exemption, the check amount is added to the Tax Exempt total.

Food Tax	75.00
Alcohol Tax	50.00

Total	125.00

Payments Section

The Payments section displays a single-line total of sales with applied payments.

Payment Total	1500.00

Show Detail — Displays the payment detail for each tender.

Payments	
Amex	22.50
Visa	81.00

Total	103.50

Comps Section

The Comps section displays a single-line total amount for comps applied to sales. This section displays for each employee.

Comps Total	33.00

Show Detail — Displays comp detail for each of the defined comps, even if the comp was not applied to the sale.

Comps	
Senior	22.50
Police	10.50

Total	33.00

Promos Section

The Promos section displays a single-line total amount of promotions applied to sales. This section displays for each employee.

Promos Total	57.00

Show Detail — Displays promotion detail for each of the defined promotions, even if the promotion was not applied to a sale.

Promos	
Promo 1	28.00
Promo 2	29.00

Total	57.00

Cash Cards Sold Section

The Cash Cards Sold section displays the total amount of sales paid with cash cards for each sales and retail category. This section displays for each employee.

Cash Cards	
Cash Card 1	0.00
Cash Card 2	20.00

Total	20.00

Gift Certs Sold Section

The Gift Certs Sold section displays a single-line total amount of sales with applied gift certificates.

Gift Cert Total	50.00

Show Detail — Displays the sales totals for each defined gift certificates with an ending total.

Gift Certificates	
$5	10.00
$10	40.00

Total	50.00

Credit Card Tip Refund Section

The Credit Card Tip Refund section displays a single-line sales total for all transactions which a tip was refunded.

Tip Reduction Total	2.00

Surcharges Section

The Surcharges section displays a single-line sales total for total and collected surcharges. This section displays for each employee.

Surcharges Total	8.50
Surcharges Collected	7.10

Order Mode Charges Section

The Order Mode Charges section displays a single-line sales total for charges associated with each defined order mode. For example, if a $0.30 charge is added to all to go orders, $0.30 is added to the total for each transaction closed with a to go order mode. Order modes are defined in Maintenance > System > Order Modes. This section displays for each employee.

Order Mode Charges	4.18

Petty Cash Section

The Petty Cash section displays a single-line total amount applied to petty cash accounts. This section displays for each employee.

Petty Cash	14.21

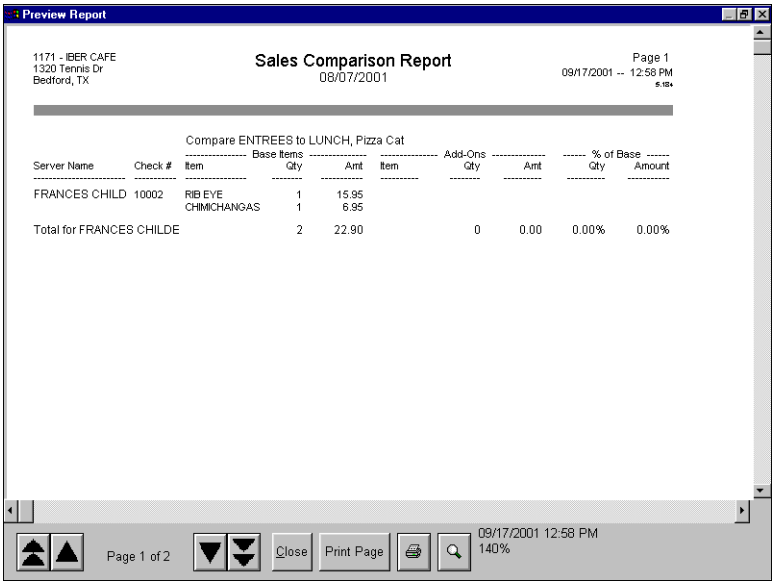
Show Detail — Displays totals for each defined petty cash account, even if the account did not have any transactions, with an ending total.

Petty Cash	
Supplies	10.00
Paidouts	4.21
Cake Deposit	0.00

Total:	14.21

Comparative Employee Sales Report

The Comparative Employee Sales report compares sales information by category for a particular day. This report is commonly used to find the percentage of a particular category compared to another category. For example, what is the percentage of desserts sold compared to entrees. The report displays as shown in Figure 3-16:



Preview Report

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Sales Comparison Report
08/07/2001

Page 1
09/17/2001 -- 12:58 PM

Compare ENTREES to LUNCH, Pizza Cat

Server Name	Check #	Base Items Item	Base Items Qty	Base Items Amt	Add-Ons Item	Add-Ons Qty	Add-Ons Amt	% of Base Qty	% of Base Amount
FRANCES CHILD	10002	RIB EYE	1	15.95					
		CHIMICHANGAS	1	6.95					
Total for FRANCES CHILDE			2	22.90		0	0.00	0.00%	0.00%

Page 1 of 2 | Close | Print Page | 09/17/2001 12:58 PM 140%

Figure 3-16 Server Sales Detail Report Preview

Select Reports > Comparative Employee Sales. The Check Sales dialog box appears..

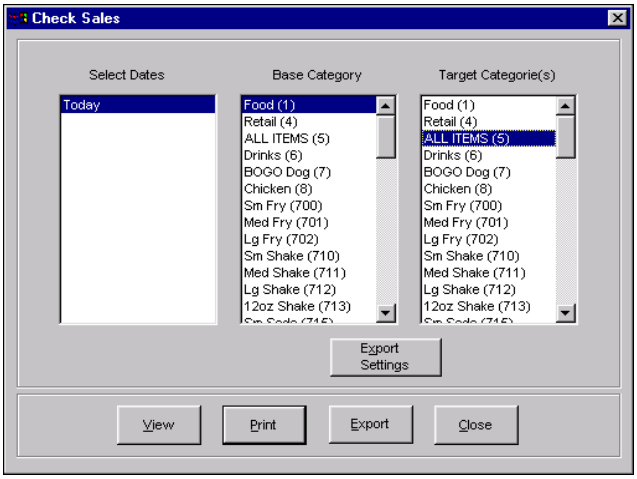


Figure 3-17 Check Sales Dialog Box

Select a single date, or a range of dates from the selection list. Select a base category and one or more target categories for comparison. For example, sales in the Food category can be compared to sales in the Salads, Cold Bev, Hot Bev, Fountain, and Food Mods categories.

The Comparative Employee Sales report contains the following columns:

Employee — Name of the tippable employee for the guest check.

Recpt# — Guest check number.

Item for Base Items — Item(s) found in the base category. For example, to compare a category against all product items, this would be the category containing all items.

Quantity for the Base Items — Quantity sold of the corresponding items.

Amount for the Base Items — Total sales of the corresponding item.

Item for Add-Ons — Item found in the target category. For example, to compare the percentage of desserts to all product items, dessert items would be found in the Add-Ons column.

Quantity for the Add-Ons — Quantity sold of the corresponding item.

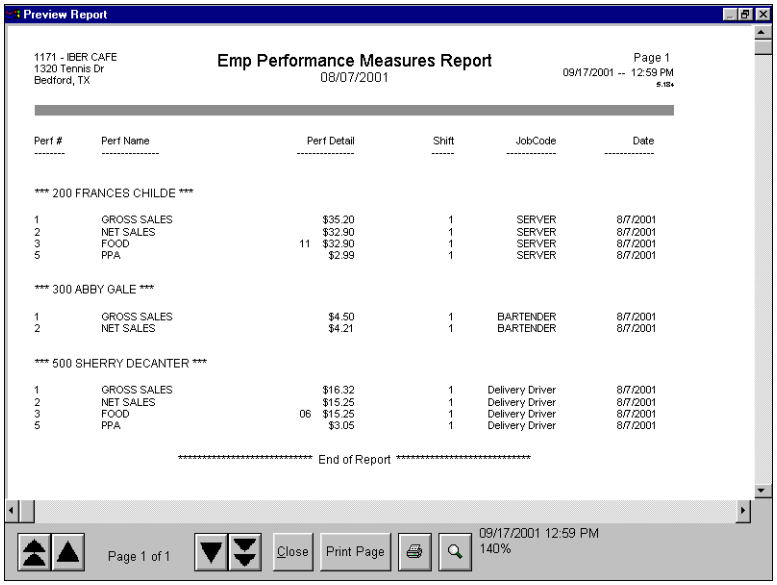
Amount for the Add-Ons — Total sales from the item found in the target category.

Quantity for the % of Base — Calculated percentages of the quantity of items sold based on the following calculation: total quantity sold in target category ÷ total quantity sold in base category. This displays for the corresponding employee only and not for line items.

Amt for the % of Base — Calculated percentages of sales based on the following calculation: total sales in target category ÷ total sales in base category. This displays for the corresponding employee only and not for line items.

Performance Measures Report

The Performance Measures report provides a detailed listing of all performance measures tracked from Front-of-House operations. Performance measures gauge necessary sales reporting, such as counts to guests and sales per hour and are defined in Maintenance > Labor > Performance Measures. The report displays as shown in Figure 3-18:



Preview Report

1171 - IBER CAFE
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Bedford, TX

Emp Performance Measures Report
08/07/2001

Page 1
09/17/2001 -- 12:59 PM

Perf #	Perf Name	Perf Detail	Shift	JobCode	Date
*** 200 FRANCES CHILDE ***					
1	GROSS SALES	$35.20	1	SERVER	8/7/2001
2	NET SALES	$32.90	1	SERVER	8/7/2001
3	FOOD	11 $32.90	1	SERVER	8/7/2001
5	PPA	$2.99	1	SERVER	8/7/2001
*** 300 ABBY GALE ***					
1	GROSS SALES	$4.50	1	BARTENDER	8/7/2001
2	NET SALES	$4.21	1	BARTENDER	8/7/2001
*** 500 SHERRY DECANTER ***					
1	GROSS SALES	$16.32	1	Delivery Driver	8/7/2001
2	NET SALES	$15.25	1	Delivery Driver	8/7/2001
3	FOOD	06 $15.25	1	Delivery Driver	8/7/2001
5	PPA	$3.05	1	Delivery Driver	8/7/2001

********** End of Report **********

Page 1 of 1 Close Print Page 09/17/2001 12:59 PM 140%

Figure 3-18 Performance Measures Report Preview

You can also view performance measures over a range of dates that lists totals for each employee. This enables managers to evaluate their employees during a specific time period for a more precise performance measurement.

```
                    Emp Performance Measures Report
                         06/02/2007 -- 06/05/2007
Perf #    Perf Name              Perf Detail    Shift                JobCode     Date
All Revenue Centers


*** 500 Paul Bartender Phoenix ***

1         FOOD
          Total:                        N/A
          Average:                     100%

4         ALL ITEMS
          Total:                    $156.66
          Average:                   $22.38


*** 999 John Manager Smith ***

1         FOOD
          Total:                        N/A
          Average:                     100%

4         ALL ITEMS
          Total:                    $205.89
          Average:                   $41.18

***************************  End of Report  ***************************
```

Figure 3-19 Performance Measures Report Across Multiple Dates

Required settings:

- Print Detail Lines
- Sort Detail Lines
- Print Subtotals

Select Reports > Performance Measures. The Employee Performance Measures Report dialog box appears.

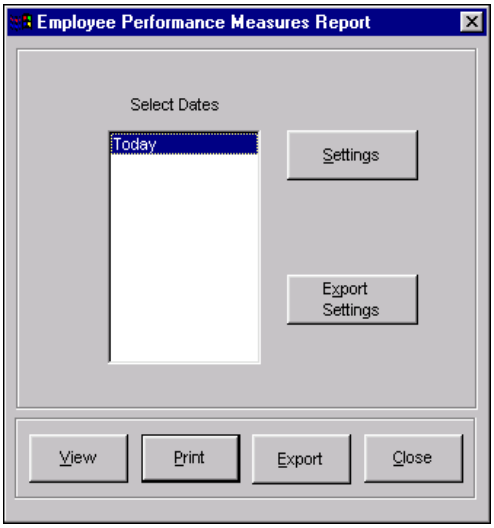


Figure 3-20 Employee Performance Measure Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Performance Measures Report Settings

Click Settings to display the Performance Measures Report Settings dialog box.

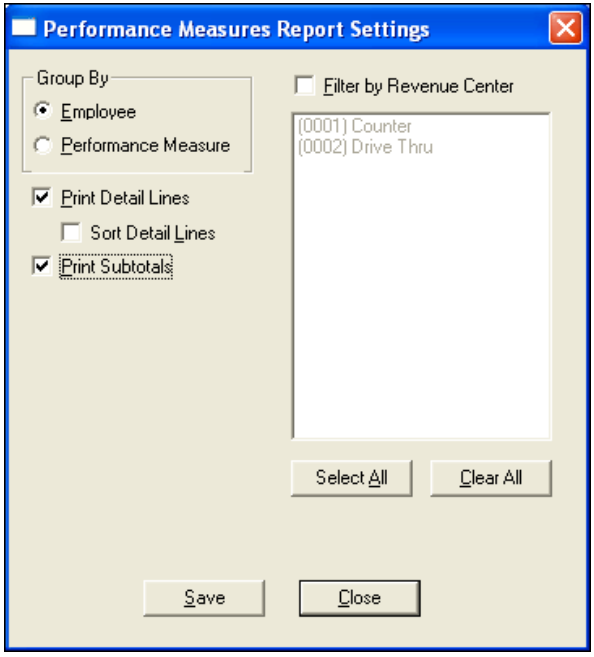


Figure 3-21 Performance Measures Report Settings Dialog Box

The following options are available for the Performance Measures report:

Sort By Group Box

Employee — Sorts the report by employee.

Performance Measure — Sorts the report by performance measure.

Other Options on the Performance Measures Report Settings

Print Detail Lines — Prints individual shift information in addition to totals.

Sort Detail Lines — Prints individual shift information, sorted by date. ***Required Options:*** You must select 'Print Detail Lines' to enable this option.

Print Subtotals — Prints a subtotal for each performance report.

Filter by Revenue Center — Enables the report to be filtered by all revenue center(s). Select this setting to display all defined revenue centers in the list box. Select the revenue center(s) as necessary and click Save.

Select All — Selects all revenue centers in the list box.

Clear All — Clears all revenue centers from the list box.

If you have configured a performance measure to calculate gross sales, you can exclude voids from gross sales by selecting 'Gross Sales Do Not Include Voids' in Maintenance > Store Settings > Financials > Reports.

Click Save to save the changes and return to the Performance Measures Report dialog box, or click Close to return without saving.

The Performance Measures report contains the following columns:

Perf # — Performance measure ID number.

Perf Name — Name of the defined performance measure.

Perf Detail — Count and total amount of performance measure.

Shift — Shift number for the performance measure.

JobCode — Job code for which the employee was working.

Date — Date of business for the shift.

Hourly Sales and Labor Report

The Hourly Sales and Labor report provides sales and labor information based on a chosen time period, including the labor percentage as it pertains to net sales and as it pertains to gross sales. The information is based on when a guest check is opened. Certain job codes are eliminated from this report using the Do Not Update Flash/Hourly Sales Report check box located in Maintenance > Labor > Job Codes.

There are two options for the Hourly Sales and Labor report:

Summary Report — Displays information for a selected date(s)

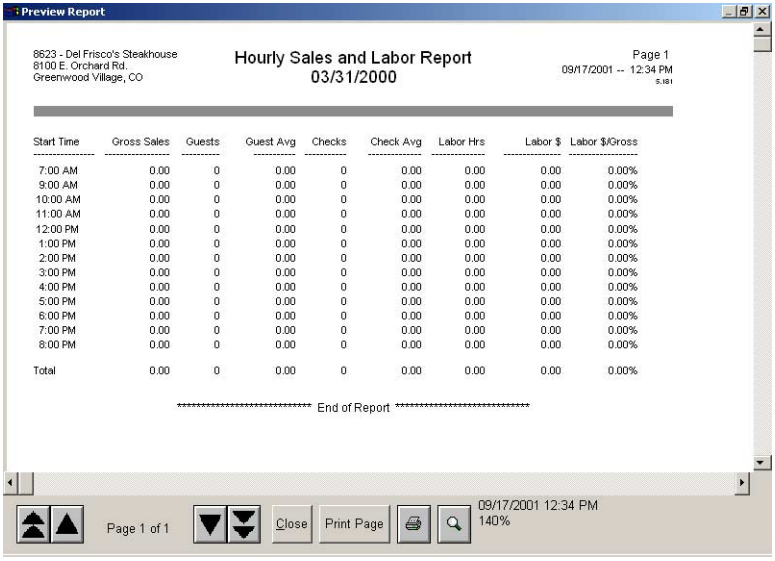


Figure 3-22 Hourly Sales and Labor Summary Report Preview

Weekly Report — Displays information for a selected week(s).

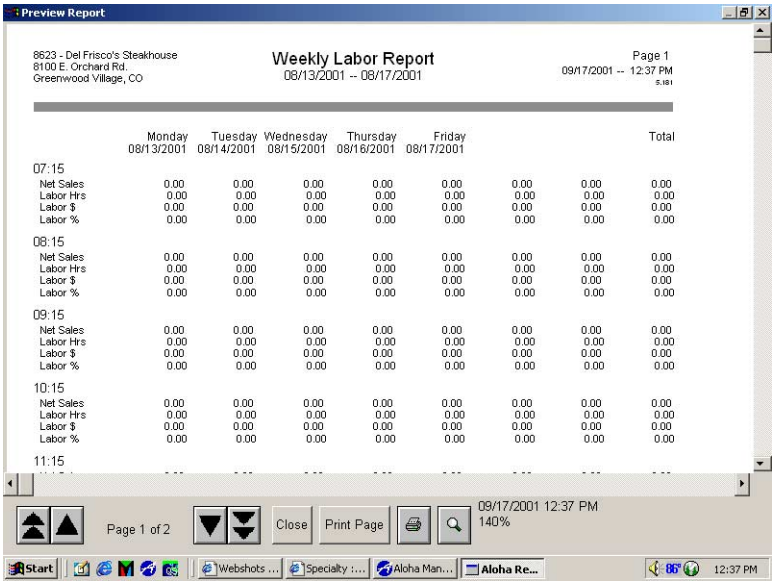


Figure 3-23 Hourly Sales and Labor Weekly Report Preview

Select Reports > Sales > Hourly Sales and Labor Report to access the Hourly Sales and Labor report. The Hourly Sales and Labor dialog box appears.

Figure 3-24 Hourly Sales and Labor Dialog Box

Select a single date, or a range of dates, from the selection list.

Hourly Sales and Labor Report Settings

Click Settings to open the Hourly Sales Report Settings dialog box containing time increments from which the ‘through time’ to use for creating the report can be chosen.

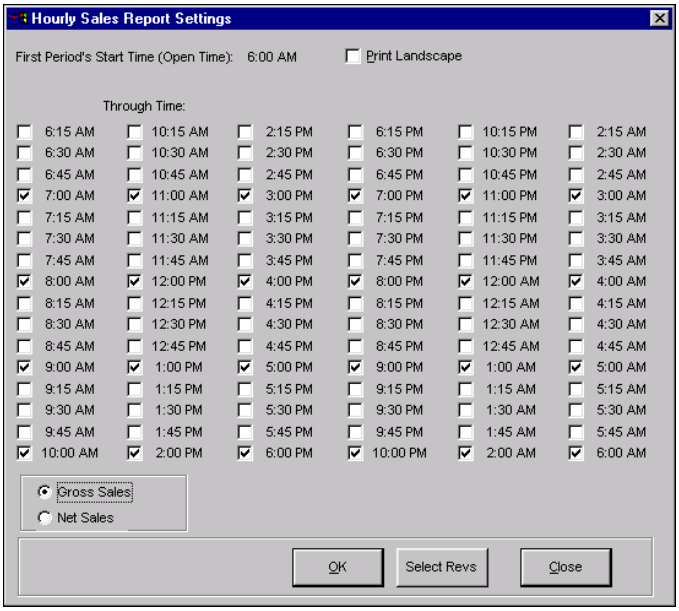


Figure 3-25 Hourly Sales Report Settings Dialog Box

Select the ending time (Through Time) for determining the information to include on the report. For example, if 11:15 a.m. is selected, the report contains information through 11:15 a.m. Information after 11:15 a.m. is not included in the report.

Print Landscape — Prints the report in landscape format.

Gross Sales — Displays only gross sales totals. This option includes voids unless you select ‘Gross Sales Do Not Include Voids’ in Maintenance > Store Settings > Financials > Reports.

Net Sales — Displays only net sales totals.

Select Revs Button

Click Select Revs to include only specific revenue centers in the report.

To select the revenue centers to include in the report:

1. Click **Select Revs**. The Limit Which Revenue Centers to Report dialog box appears.

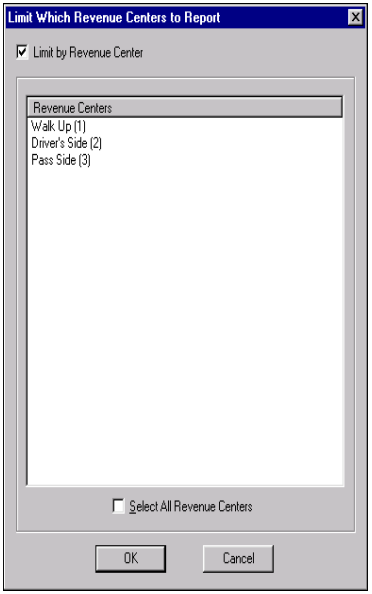


Figure 3-26 Limit Which Revenue Center to Report Dialog Box

2. Select **Limit by Revenue Center**.
3. Click each **revenue center**(s) until all necessary revenue centers are selected, or select the '**Select All Revenue Centers**' check box to include all revenue centers.
4. Click **OK**.

The Hourly Sales and Labor report contains the following columns:

Start Time — Start time for the period.

Gross Sales — Gross sales for the time period based on the following calculation: net sales + taxes + comps + promos + surcharges. This option includes voids unless you select 'Gross Sales Do Not Include Voids' in Maintenance > Store Settings > Financials > Reports.

Net Sales — Total sales from menu items only, with comps, promos, taxes, voids, refunds, and overrings deducted for the time period.

Guests — Total number of guests for the time period.

Checks — Total number of checks for the time period.

Labor Hours — Total labor hours for the time period.

Labor ( ) — Total labor dollars for the time period based on the following calculation: labor hours x employee's pay rate.

Labor/Net Sales — Calculated percentage of labor dollars per net sales for the time period, based on the following calculation: labor dollars ÷ net sales.

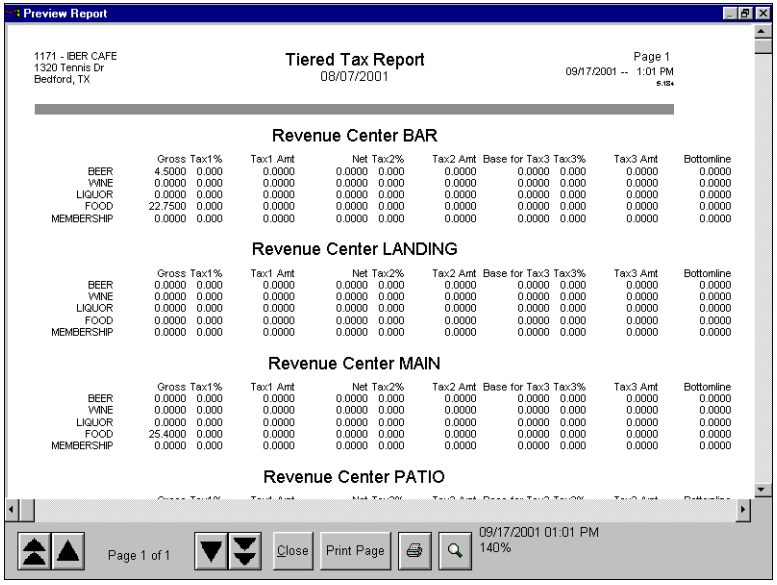
Labor/Gross Sales — Calculated percentage of labor dollars per gross sales for the time period, based on the following calculation: labor dollars ÷ gross sales.

Tiered Tax Report

The Tiered Tax report displays three types of taxes, such as primary tax, gratuity tax, and beverage tax, based on the percentage of gross sales by category, by revenue center. These taxes are indicated as Tax1, Tax2, and Tax3 respectively and calculated independently of all Front-of-House calculations.

This report is specific to the standards of the Austrian government.

The report displays as shown in Figure 3-27:



Preview Report

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Tiered Tax Report
08/07/2001

Page 1
09/17/2001 -- 1:01 PM

Revenue Center BAR

	Gross	Tax1%	Tax1 Amt	Net	Tax2%	Tax2 Amt	Base for Tax3	Tax3%	Tax3 Amt	Bottomline
BEER	4.5000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
WINE	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
LIQUOR	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
FOOD	22.7500	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
MEMBERSHIP	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000

Revenue Center LANDING

	Gross	Tax1%	Tax1 Amt	Net	Tax2%	Tax2 Amt	Base for Tax3	Tax3%	Tax3 Amt	Bottomline
BEER	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
WINE	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
LIQUOR	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
FOOD	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
MEMBERSHIP	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000

Revenue Center MAIN

	Gross	Tax1%	Tax1 Amt	Net	Tax2%	Tax2 Amt	Base for Tax3	Tax3%	Tax3 Amt	Bottomline
BEER	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
WINE	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
LIQUOR	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
FOOD	25.4000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000
MEMBERSHIP	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000	0.000	0.0000	0.0000

Revenue Center PATIO

Page 1 of 1 Close Print Page 09/17/2001 01:01 PM 140%

Figure 3-27 Tiered Tax Report Preview

Select Reports > Sales > Tiered Tax Report. The Tiered Tax Report dialog box appears.

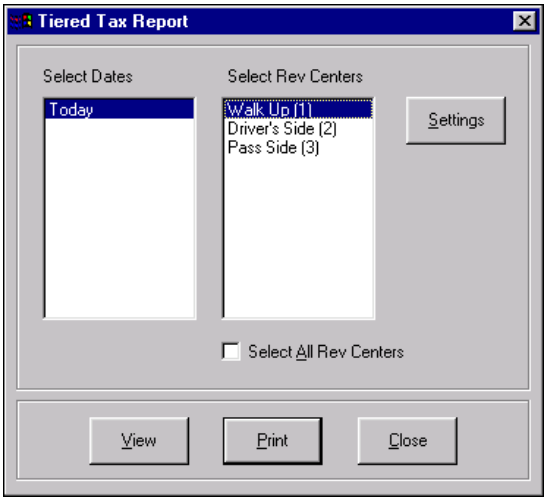


Figure 3-28 Tiered Tax Report Dialog Box

Select a single date, or a range of dates, from the selection list. Select the revenue center to include in the report.

Select all Revenue Centers — Selects all defined revenue centers.

Tiered Tax Report Settings

Click Settings to display the Tiered Tax Report Settings dialog box.

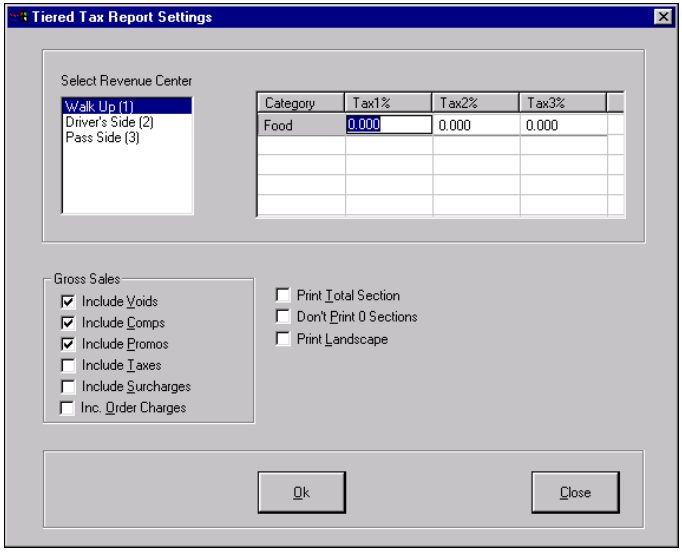


Figure 3-29 Tiered Tax Report Settings Dialog Box

Select a Revenue Center — Designates the revenue center to include in the report. All defined revenue centers display in the list.

Category and Tax Columns — Denotes the tax levels for the Tax1, Tax2, and Tax3 columns for each sales category. Categories display in the order of their ID numbers.

Print Total Section — Prints an ending total on the report.

Don't Print 0 Sections — Excludes categories that do not have any transactions.

Gross Sales Group Box

Include Voids — Includes voids in the gross sales total. This option is disabled unless you select 'Gross Sales Do Not Include Voids' in Maintenance > Store Settings > Financials > Reports.

Include Comps — Includes comps in the gross sales total.

Include Promos — Includes promos in the gross sales total.

Include Taxes — Includes taxes in the gross sales total.

Include Surcharges — Includes surcharges in the gross sales total.

Include Order Charges — Includes order charges in the gross sales total.

The Tiered Tax report displays the following columns:

Gross — Displays the gross sales total, as defined in the Tiered Tax Report Settings dialog box. This calculation includes voids unless you select 'Gross Sales Do Not Include Voids' in Maintenance > Store Settings > Financials > Reports.

Tax1 Amount — Displays the taxed amount based on the following calculation: (gross sales x Tax1%) ÷ (100 + Tax1%).

Net Sales — Displays net sales based on the following calculation: gross sales - Tax1 amount.

Tax2 Amount — Displays the taxed amount based on the following calculation: (net sales x Tax2%) ÷ (100 + Tax2%).

Base for Tax3 — Displays sales based on the following calculation: Net - Tax2 Amount.

Tax3 Amount — Displays the taxed amount based on the following calculation: (Base for Tax3 - Tax3 %) ÷ (100 + Tax3).

Bottomline — Displays sales based on the following calculation: Base for Tax3 - Tax3 Amount.

Employee Reports

The Employee submenu, shown in Figure 3-30, provides reports that pertain to restaurant labor.

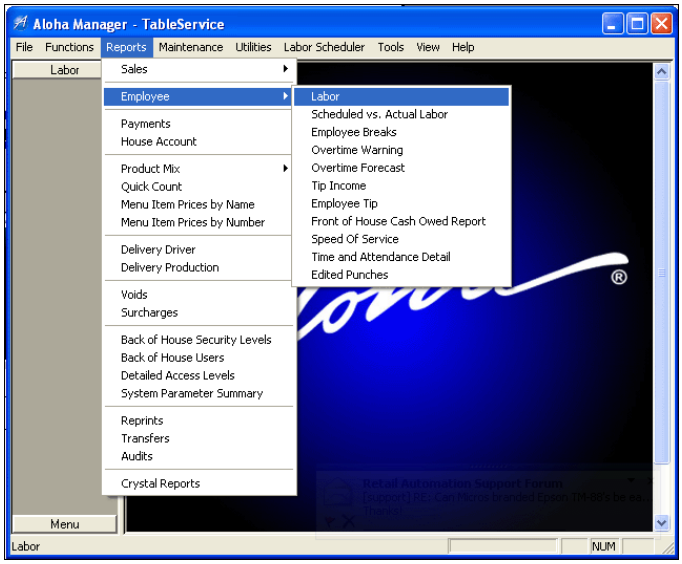


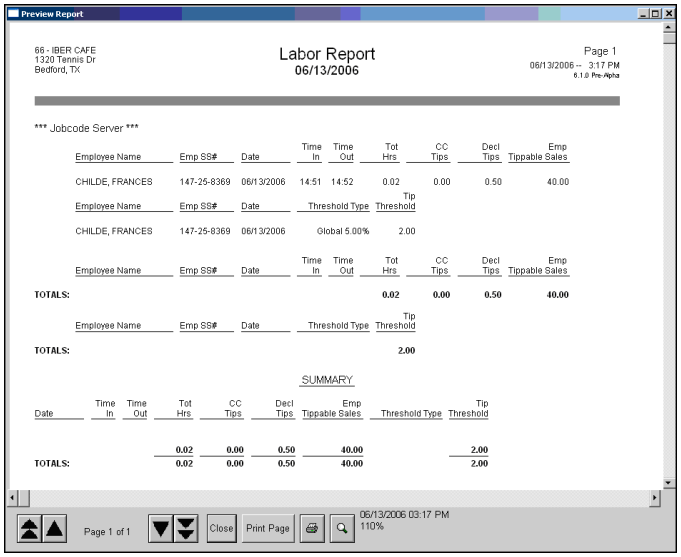
Figure 3-30 Employee Submenu

The reports available from the Employee submenu are:

- Labor
- Scheduled vs Actual Labor
- Employee Breaks
- Edited Punches
- Overtime Warning
- Overtime Forecast
- Tip Income
- Employee Tip
- Front-of-House Cash Owed
- Speed of Service
- Time and Attendance Detail

Labor Report

The Labor report generates shift information for a selected period of time. The Labor reports can contain employee clock in/clock out times, break information, regular and overtime pay rates, regular and overtime hours, declared tips, and more. Define, name, save, and run as many labor reports with separate settings, as needed. The report displays as shown in Figure 3-31:



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Labor Report
06/13/2006

Page 1
06/13/2006 -- 3:17 PM
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*** Jobcode Server ***

Employee Name	Emp SS#	Date	Time In	Time Out	Tot Hrs	CC Tips	Decl Tips	Emp Tippable Sales
CHILDE, FRANCES	147-25-8369	06/13/2006	14:51	14:52	0.02	0.00	0.50	40.00

Employee Name	Emp SS#	Date	Threshold Type	Tip Threshold
CHILDE, FRANCES	147-25-8369	06/13/2006	Global 5.00%	2.00

Employee Name	Emp SS#	Date	Time In	Time Out	Tot Hrs	CC Tips	Decl Tips	Emp Tippable Sales
TOTALS:					**0.02**	**0.00**	**0.50**	**40.00**

Employee Name	Emp SS#	Date	Threshold Type	Tip Threshold
TOTALS:				**2.00**

SUMMARY

Date	Time In	Time Out	Tot Hrs	CC Tips	Decl Tips	Emp Tippable Sales	Threshold Type	Tip Threshold
			0.02	**0.00**	**0.50**	**40.00**		**2.00**
TOTALS:			**0.02**	**0.00**	**0.50**	**40.00**		**2.00**

Page 1 of 1 Close Print Page 06/13/2006 03:17 PM 110%

Figure 3-31 Labor Report Preview

Select Reports > Employee > Labor. The Labor Report dialog box appears.

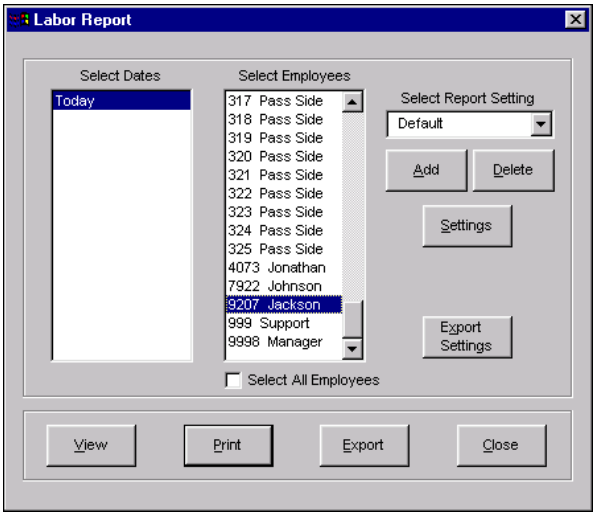


Figure 3-32 Labor Report Dialog Box

Select a single date, or a range of dates, from the selection list. Select an employee from the employee list, or click 'Select All Employees' to include sales information for all employees on the report.

Labor Report Settings

Click Settings to open the report configuration dialog box which allows the report title to be established using the Report Title text box, as well as the selection of the information to include on the printed report.

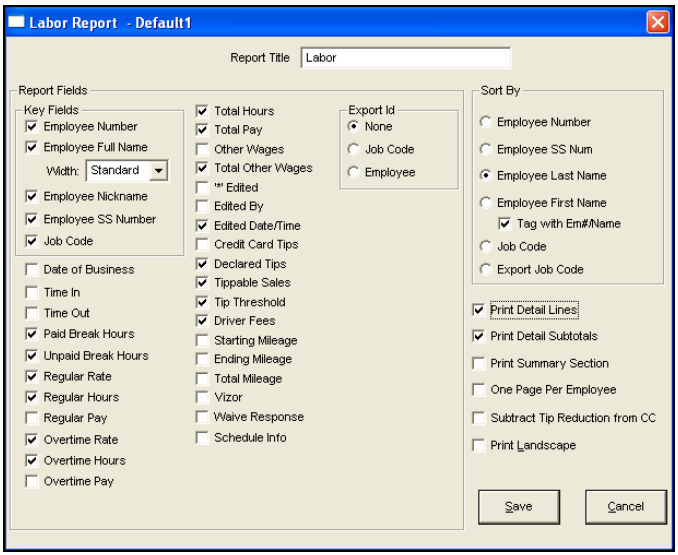


Figure 3-33 Labor Report Dialog Box

Report Fields Group Box

Configure labor reports by clicking the check boxes to add or remove the information. A check mark indicates the information is included in the report.

Employee Number — Denotes the ID number of the employee.

Employee Full Name — Denotes the full name of the employee.

Width — Indicates the width to use for the employee's full name. Select from 'Standard,' 'Wide,' and 'Extra Wide.'

Employee Nickname — Denotes the nickname of the employee.

Employee SS Number — Denotes the social security number of the employee.

Date of Business — Indicates the system date of business.

Job Code — Indicates the job code under which the employee clocked in.

Time In — Indicates the employee's clock in time for the shift. Employee working a second shift reports on a second line.

Time Out — Indicates the employee's clock out time for the shift. Employees working a second shift reports on a second line.

Paid Break Hours — Displays the total paid break minutes for the employee's shift. The job code must have the ability to take paid breaks for data to display.

Unpaid Break Hours — Displays the total unpaid break minutes for the employee's shift. The job code must have the ability to take unpaid breaks for data to display.

Regular Rate — Displays the regular rate of pay for the employee.

Regular Hours — Displays the total hours worked for the shift, excluding overtime hours.

Regular Pay — Displays the total labor dollars earned for the shift, excluding overtime hours and dollars, based on the following calculation: reg rate x reg hours.

Overtime Rate — Designates the overtime pay rate for the employee. Overtime pay rates are configured as either 'Calculate OT by Shift Rate' or 'Calculate OT by Average Rate', as defined in Maintenance > Store Settings > Labor > ClockIn/Out.

If the overtime pay rate is configured as 'Calculate OT by Shift Rate', the pay rate is based on the following calculation: reg rate x 'mult' text box. Define the 'mult' setting in the Overtime group box.

If the overtime pay rate is configured as 'Calculate OT by Average Rate', the pay rate is based on the following calculation: (reg hours x reg pay rate) ÷ (reg hours + overtime hours) x (0.5 + reg rate).

Overtime Hours — Denotes the total overtime hours worked for the employee's shift.

Overtime Pay — Denotes the total overtime labor dollars earned for the shift, based on the following calculation: overtime rate x overtime hours.

Total Hours — Denotes the total number of hours worked for the employee's shift, based on the following calculation: reg hours + overtime hours.

Total Pay — Displays the total labor dollars earned for the employee's shift, based on the following calculation: (reg hours x reg rate) + (overtime hours x overtime rate).

Other Wages — Displays columns for wage type, other wages hours, and other wages amount.

Total Other Wages — Displays the value of each line, including system generated 'other wages'.

(*) Edited — Displays a preceding asterisk if a punch whenever the transaction was edited through the Edit Punches function.

Edited By — Displays the name and ID number of the employee who edited the punch through the Edit Punches function.

Edited Date/Time — Includes the date and time for punches edited by an employee.

Credit Card Tips — Displays the total amount of tips from all non-cash tenders for the employee's shift.

Declared Tips — Displays the total amount of tips declared at clock out for the employee's shift. This total is equal to or greater than the amount of credit card tips total.

Tippable Sales — Displays sales from order modes selected as tippable.

Tip Threshold — displays the threshold type enforced on the corresponding employee. For example, if an employee uses the 'Global Percentage' tip declaration method at 5%, the Labor report displays 'Global 5.00%.'Use this column to ensure employees declare at least this amount for federal tax reasons.

Driver Fees — Displays the total driver fees collected by the employee.

Starting Mileage — Designates the starting mileage as entered by the employee when they clocked in. The employee is required to enter starting mileage if 'Track Mileage' is selected in Maintenance > Labor > Job Codes > Delivery.

Ending Mileage — Designates the ending mileage as entered by the employee when they clocked out. The employee is required to enter ending mileage if 'Track Mileage' is selected in Maintenance > Labor > Job Codes > Delivery.

Total Mileage — Designates the total number of miles driven for the employee's shift based on the following calculation: ending mileage - starting mileage.

Vizor — Denotes the total amount the employee contributed to the VizorVest investment program.

Waive Response — Reports responses from the employee when they are prompted to waive their meal period break. 'Y' indicates the employee waived the break. 'No' indicates the employee did not waive the break.

Schedule Info — Includes the times for when the employee was scheduled to start work, end work, the total time the employee was scheduled to work, and the job code for which the employee was scheduled.

Export ID Group Box

Print the report with information from a third party software by the employee's Export ID. Select the employee's ID, a job code's Export Code, or none. If None is selected, the Export ID is not included on the report.

Sort By Group Box

Sort the report by one of the six sort options: Employee Number, Employee Social Security Number, Employee Last Name, Employee First Name, Job Code, and Export Job Code. If the report is sorted by one of the employee settings, a secondary job code sort is needed. If the sort method is by job code, a secondary employee sort is needed.

Other Labor Report Settings

Print Detail Lines — Prints individual shift information in addition to totals.

Print Detail Subtotals — Includes details on the subtotals printed on the report.

Print Summary Section — Provides a summary section at the end of the report. The summary section encapsulates the information from the body of the report. This section does not display

columns that do not have data. The ‘Sort By’ selection determines the information in the Print Summary section.

One Page Per Employee — Prints each employee’s record on a separate page.

Subtract Tip Reduction from CC — Subtracts tips applied to credit cards from sales.

Print Landscape — Prints the report in landscape format.

Scheduled vs. Actual Labor Report

The Scheduled vs. Actual Labor report compares the scheduled labor against the actual labor for a specific week or range of weeks. The report also compares sales dollars against labor dollars.

Select Reports > Employee > Scheduled vs Actual Labor. The Scheduled vs Actual Labor dialog box appears.

Figure 3-34 Scheduled vs Actual Labor Dialog Box

Select a week, or range of weeks, from the Select Week list box.

Report by Shift — Breaks the report down into shifts.

Include in Sales on Report Group Box

The sales figures are adjusted using the check boxes in this group box. These check boxes display here rather than on a Settings configuration dialog box, and define additional data to include in the sales figures on the report. The check boxes and their effect on the report are:

Inclusive/Vendor Taxes — Adds inclusive and vendor taxes to the sales amounts.

Exclusive Taxes — Adds exclusive taxes to the sales amounts.

Promos — Includes promotions in the sales amounts.

Comps — Includes comps in the sales amounts.

After making the selections, click View or Print. To exit the report, click Done.

The Scheduled vs Actual Labor report provides the following columns:

Total Sales — Displays the gross sales for each defined sales category.

Job Group — Displays the job group and their corresponding job codes.

Scheduled Hours — Displays the total hours scheduled for each job code and job group.

Scheduled ($) — Displays the total number of labor dollars scheduled for each job code and job group.

Scheduled % Sales — Displays the calculated percentage of sales for each job code and job group, based on the following calculation: scheduled ($) x 100.

Actual Hours — Displays the actual number of hours worked for each job code and job group.

Actual ($) — Displays the actual total of labor dollars earned for each job code and job group.

Actual % Sales — Displays the calculated percentage of actual sales for each job code and job group, based on the following calculation: actual sales ÷ 100.

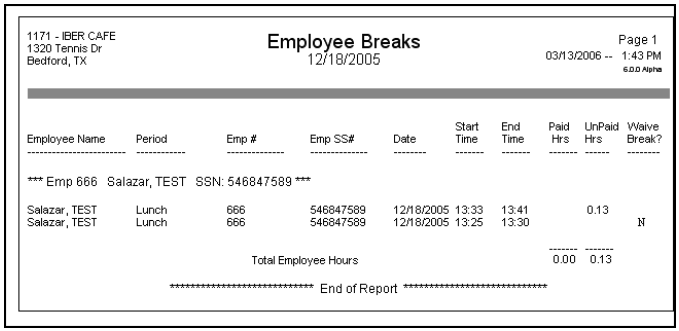
Difference Hours — Displays the difference between scheduled hours and actual hours for each job code and job group, based on the following calculation: scheduled hours - actual hours.

Difference ($) — Displays the difference between scheduled and actual labor dollars for the job code and job group, based on the following calculation: scheduled labor dollar - actual labor dollar.

Difference % Sales — Displays the difference between scheduled and actual percentage of sales for the job code and job group, based on the following calculation: scheduled % sales - actual % sales.

Employee Breaks Report

The Employee Breaks report contains a listing of the employee break ins and break outs. The report appears.



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Employee Breaks
12/18/2005

Page 1
03/13/2006 -- 1:43 PM
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Employee Name	Period	Emp #	Emp SS#	Date	Start Time	End Time	Paid Hrs	UnPaid Hrs	Waive Break?
*** Emp 666 Salazar, TEST SSN: 546847589 ***									
Salazar, TEST	Lunch	666	546847589	12/18/2005	13:33	13:41		0.13	
Salazar, TEST	Lunch	666	546847589	12/18/2005	13:25	13:30			N
Total Employee Hours							0.00	0.13	

********** End of Report **********

Figure 3-35 Employee Breaks Report Preview

Select Reports > Employee > Employee Break. The Employee Break Report dialog box appears.

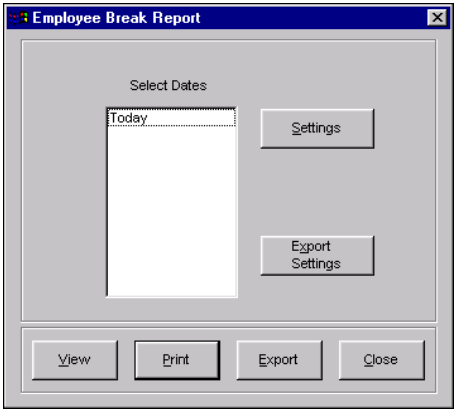


Figure 3-36 Employee Breaks Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Employee Break Report Settings

Click Settings to open a report configuration dialog box that contains the Sort By group box used to select the sorting method for the report.

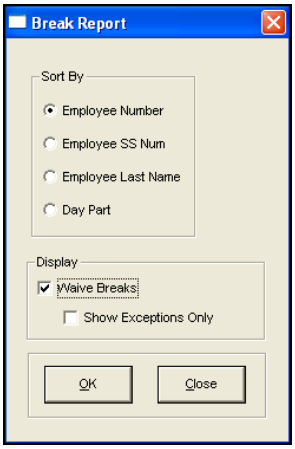


Figure 3-37 Break Report Dialog Box

Sort By Group Box

Only one sort option from the Sort By group box can be selected for the report.

When finished, click OK. The screen returns to the Employee Break Report dialog box.

The Employee Breaks report contains the following columns:

Emp SS# — Displays the employee's social security number.

Period — Displays the period in which the break was taken.

Employee Name — Displays the employee's name.

Emp # — Displays the employee's POS ID number.

Date — Displays the date the break was taken.

Start Time — Displays the time the break started.

End Time — Displays the time the break ended.

Paid Hours — Displays the total time of the paid break, based on the following calculation: paid break end time - paid break start time.

Unpaid Hours — Displays the total time of the unpaid break, based on the following calculation: unpaid break end time - unpaid break start time.

Display Group Box

Use the Display group box to include waive break responses.

Waive Breaks — Includes waive break responses in the report.

Show Exceptions Only — Displays employee records that meet one of the following conditions:

- The scheduled employee did not waive their meal break and earned mandatory penalty pay.
- The scheduled employee waived their meal break, but earned mandatory penalty pay.
- The non-scheduled employee earned meal break mandatory penalty pay.

Overtime Warning Report

The Overtime Warning Report lists each employee, their hours worked, and their overtime hours. The report displays as shown in Figure 3-38:

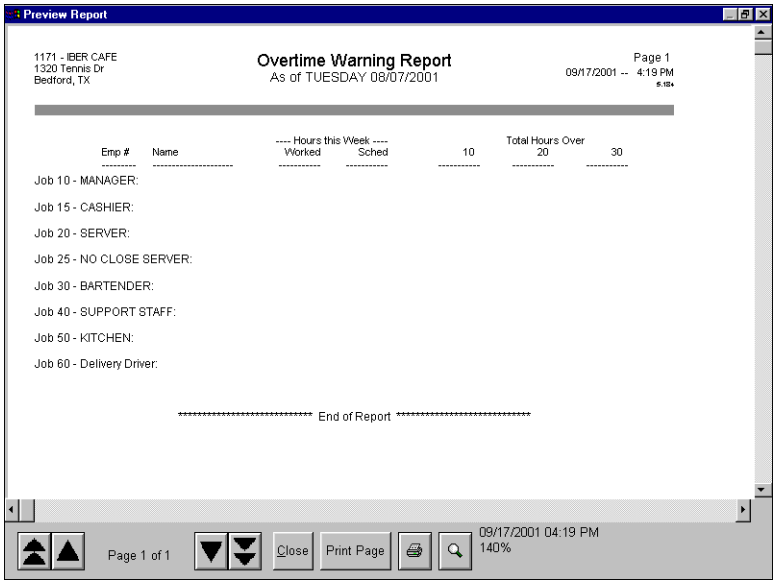


Figure 3-38 Overtime Warning Report Preview

Select Reports > Employee > Overtime Warning. The Overtime Warning Report dialog box appears.

Figure 3-39 Overtime Warning Report Dialog Box

Choose the beginning date for the report from the 'Overtime as of' list box.

Overtime Warning Settings

Click Settings to display the Overtime Warning Report Settings dialog box to set warning levels.

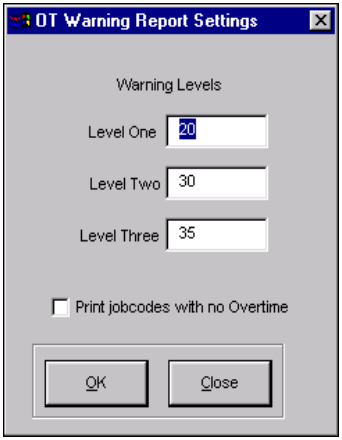


Figure 3-40 Overtime Warning Report Settings Dialog Box

Warning Levels

Warning levels may be set to show when an employee's hours are approaching specified levels. For example, the settings shown in Figure 3-40 force the system to report for employees who have reached 20+, 30+, or 35+ hours.

Print Job Codes with No Overtime — Prints the job codes that do not have any overtime since the 'as of' date.

The Employee Breaks report contains the following columns:

Emp# — Displays the employee's job code ID.

Name — Displays the employee's name.

Hours this Week Worked — Displays the total number of hours the employee has worked for the week.

Scheduled Hours this Week Worked — Displays the total number of hours the employee was scheduled for the week.

Total Hours Over — Displays the total number of hours worked over each threshold defined in the Overtime Warning Report Settings dialog box.

Overtime Forecast Report

The Overtime Forecast report provides overtime information on the number of hours worked through a given day within a week, and the number of remaining hours scheduled to work for that same week. A schedule must be created in Functions > Labor Scheduler to display accurate information.

Select Reports > Employee > Overtime Forecast. The Overtime Forecast Report dialog box displays as shown in Figure 3-41:

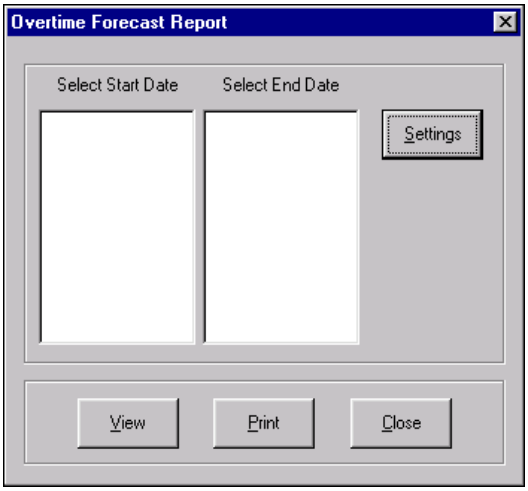


Figure 3-41 Overtime Forecast Report Dialog Box

Choose the start and end date for the report from the selection list boxes.

Overtime Forecast Report Settings

Click Settings to display the Overtime Forecast Report Settings dialog box.

Figure 3-42 Overtime Forecast Report Settings Dialog Box

Display Employees with OT Only — Displays only employees who are forecasted to receive overtime and with a greater value than 0 in the 'Forecasted OT Hours' column.

Make the necessary changes and click OK. The screen returns to the Overtime Forecast Report dialog box.

The Overtime Forecast report contains the following columns:

Actual Hours Worked to Date — Displays the total number of hours worked from the selected start of week date through the selected end date.

Remaining Scheduled — Displays the total number of hours scheduled from the last selected date through the end of that scheduled work week. If no schedule is created, the values are reported as 0.00.

Forecasted Total Hours — Displays the total number of forecasted hours based on the following calculation: actual hours worked + remaining scheduled.

Forecasted OT Hours — Displays the total number of estimated hours of overtime with the following types of overtime:

> If Weekly Overtime is in use, the forecasted OT hours are based on the following calculation: forecasted total hours - n, where n is the number of overtime work hours.
>
> If Daily Overtime or Extended Overtime are in use, the Forecasted OT Hours are based on the following:

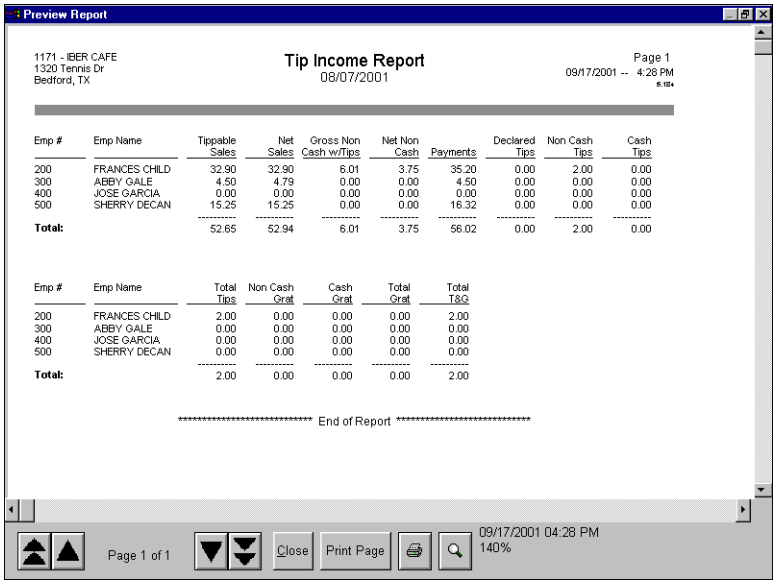
- Calculate the number of hours of overtime already worked based on the following calculation: the number of hours worked from the Start date to the End date - the number of overtime hours.
- Calculate the number of scheduled hours on a daily basis for the remainder of the week greater than the Daily Overtime threshold, based on the following calculation: hours scheduled per day - overtime day hours.
- Add the Number of OT Hours worked plus the Number of OT Hours scheduled for the remaining time period.
- Calculate the projected Weekly Overtime, based on the following calculation: Forecasted Total Hours - overtime work hours.
- Compare the values of the Daily Overtime hours to the Weekly Overtime hours and record the greater value.

PTD Variance Worked vs Scheduled — Displays the number of actual hours worked to date - the number of hours scheduled through the selected week.

Hours Allowed before OT — Displays only if the Weekly Overtime type is enabled, based on the following calculation: overtime work hours - actual hours worked to date.

Tip Income Report

The Tip Income report is used to conform to the IRS TRAC reporting policy. The report includes tippable sales, declared tips, charged sales with tips, charged tips, and auto gratuities for each employee. The Charge Tips column includes tips and auto gratuity for all charge sales. The Auto Grat column is for cash auto gratuities only. This report allows a summary over a specified range of dates to be created. The report displays as shown in Figure 3-43:



Preview Report

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Tip Income Report
08/07/2001

Page 1
09/17/2001 -- 4:28 PM

Emp #	Emp Name	Tippable Sales	Net Sales	Gross Non Cash w/Tips	Net Non Cash	Payments	Declared Tips	Non Cash Tips	Cash Tips
200	FRANCES CHILD	32.90	32.90	6.01	3.75	35.20	0.00	2.00	0.00
300	ABBY GALE	4.50	4.79	0.00	0.00	4.50	0.00	0.00	0.00
400	JOSE GARCIA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
500	SHERRY DECAN	15.25	15.25	0.00	0.00	16.32	0.00	0.00	0.00
Total:		52.65	52.94	6.01	3.75	56.02	0.00	2.00	0.00

Emp #	Emp Name	Total Tips	Non Cash Grat	Cash Grat	Total Grat	Total T&G
200	FRANCES CHILD	2.00	0.00	0.00	0.00	2.00
300	ABBY GALE	0.00	0.00	0.00	0.00	0.00
400	JOSE GARCIA	0.00	0.00	0.00	0.00	0.00
500	SHERRY DECAN	0.00	0.00	0.00	0.00	0.00
Total:		2.00	0.00	0.00	0.00	2.00

********** End of Report **********

Page 1 of 1 Close Print Page 09/17/2001 04:28 PM 140%

Figure 3-43 Tip Income Report Preview

Select Reports > Employee > Tip Income. The Tip Income Report Dialog Box appears.

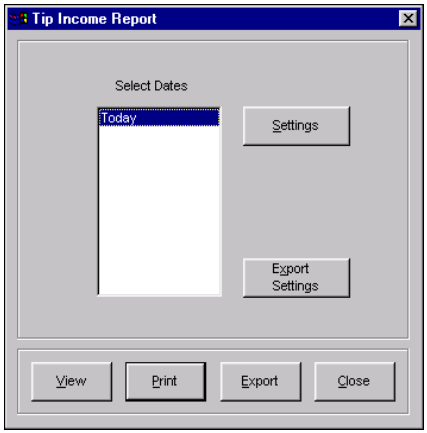

Figure 3-44 Tip Income Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Tip Income Report Settings

Click Settings to display the Tip Income Report Settings dialog box.

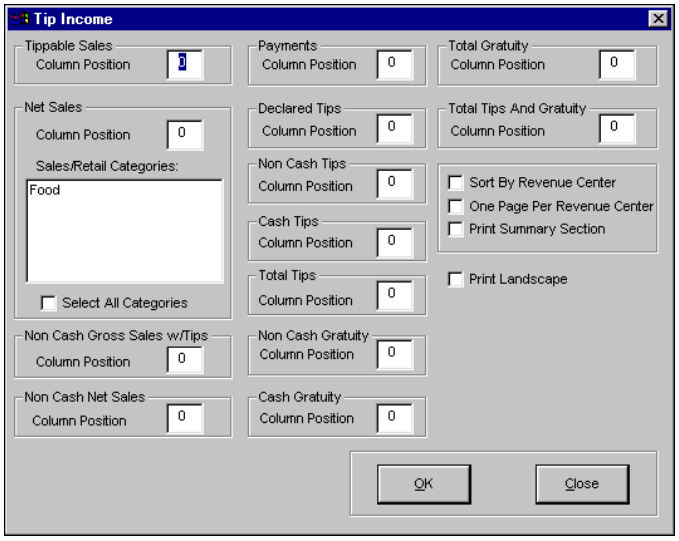

Figure 3-45 Tip Income Report Settings Dialog Box

Sort by Revenue Center — Sorts the report by each defined revenue center.

One Page Per Revenue Center — Prints one page per revenue center, if 'Sort by Revenue Center' is selected.

Print Summary Section — Prints an ending summary section for all revenue centers, if 'Sort by Revenue Center' is selected.

Print Landscape — Prints the report in landscape format.

The Tip Income report contains the following sections that display tip information by employee:

Tippable Sales Group Box

Displays net sales for the employees who are required to declare tips. Sales are considered tippable based on whether 'Tippable Sales' is selected for the order mode.

Net Sales Group Box

Enables you to specify the sales and retail categories to include in net sales, or to include all sales and retail categories.

Sales/Retail Categories — Includes the selected category(s) in net sales. Click each category to include in the report.

Select All Categories — Includes all sales and retail categories in net sales.

Non Cash Gross Sales w/Tips Group Box

Displays gross sales from transactions closed to a non-cash tender with a tip or gratuity applied.

Non Cash Net Sales Group Box

Displays net sales from transactions closed to a non-cash tender. Net sales is based on the category(s) selected in the Net Sales group box. If no categories are selected, all categories are used.

Payments Group Box

Displays the total amount from applied payments.

Declared Tips Group Box

Displays the amount of tips declared when the employee clocked out.

Non-Cash Tips Group Box

Displays the amount of tips manually entered when the employee closed transactions with a non-cash tender.

Cash Tips Group Box

Displays the amount of tips manually entered when the employee closed transactions with a cash tender.

Total Tips Group Box

Displays the total amount of tips manually entered when the employee closed transactions, regardless of the type of tender.

Non-Cash Gratuity Group Box

Displays the amount of automatic gratuity added to transactions closed with a non-cash tender.

Cash Gratuity Group Box

Displays the amount of automatic gratuity added to transactions closed with a cash tender.

Total Gratuity Group Box

Displays the amount of automatic gratuity added to transactions closed with all tenders.

Total Tips and Gratuity Group Box

Displays the amount of all tips and gratuity.

The Tip Income report contains the following columns:

Num — Displays the ID number of the employee.

Employee Name — Displays the name of the employee.

Tippable Sales — Displays the net sales amount for which the employee is required to declare tips.

Net Sales — Displays item sales based on the sales and/or retail categories you select.

Gross Non Cash w/Tips — Displays total gross sales of checks closed with a non-cash tender with a tip or gratuity added.

Net Non Cash — Displays net sales of checks closed with a non-cash tender.

Payments — Displays the total amount of all payments for the employee.

Declared Tips — Displays the amount of tips the employee declared at clockout.

Non Cash Tips — Displays the total amount of tips entered manually for checks closed to a non-cash tender.

Cash Tips — Displays the total amount of tips entered manually for checks closed to a cash tender.

Total Tips — Displays the total amount of tips entered manually, based on the following calculation: Non Cash Tips column + Cash Tips column.

Non Cash Grat — Displays the total amount of automatic gratuities applied to checks closed with a non-cash tender.

Cash Grat — Displays the total amount of automatic gratuities applied to checks closed with a cash tender.

Total Grat — Displays the total amount of automatic gratuities based on the following calculation: Non Cash Gratuity column + Cash Gratuity column.

Total T & G — Displays the total amount of manually entered tips and automatic gratuities based on the following calculation: Total Tips column + Total Gratuity column.

Employee Tip Report

Use the Employee Tip report to conform to the annual IRS 8027 report to display the tip declarations of tipped and indirectly tipped employees. With this report you can monitor and eliminate the under declaration of tips, and also provide all the information you need for 8027 filing. You, and your tipped employees, are responsible for reporting tip information.

Iber Café
1320 Tennis Drive
Bedford, TX 76022

Employee Tip Report
01/01/2005 - 01/07/2005

Page 1
8/30/2001
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*** * * Directly Tipped Employees * * ***

		Total Sales	Total Tips	Total %	Charge Sales	Charge Tips	Charge %	Non Charge Sales	Non Charge Tips	Non Charge %	Tip Variance	Sales w/ Auto Grat	Auto Gratuity
1148	Pohl, Kenneth	1596.10	156.89	9.83%	954.00	100.89	10.58%	642.10	56.00	8.72%	1.85%	216.50	32.48
1212	Newman, Ryan	2628.32	374.00	14.23%	1478.55	225.00	15.22%	1149.77	149.00	12.96%	2.26%	180.05	27.01
1717	Kenseth, Matt	4791.09	673.41	14.06%	2968.41	426.41	14.36%	1822.68	247.00	13.55%	0.81%	0.00	0.00
2424	Gordon, Jeff	4592.50	699.50	15.23%	2746.20	420.50	15.31%	1846.30	279.00	15.11%	0.20%	392.46	58.87
4848	Johnson, Jimmie	2904.93	431.00	14.84%	1649.49	256.00	15.52%	1255.44	175.00	13.94%	1.58%	180.70	27.11
Directly Tipped Total		16512.94 (5)	2334.80 (4b)	14.14%	9796.65 (2)	1428.80 (1)	14.58%	6716.29	906.00	13.49%	1.09%	969.71	145.46

*** * * Indirectly Tipped Employees * * ***

		Total Tips
8888	Jarrett, Dale	56.00
2121	Rudd, Ricky	73.00
808	Earnhardt, Dale	214.00
202	Wallace, Rusty	115.00
Indirectly Tipped Total		458.00 (4a)

*** * * Total Tips * * ***

Total Tips: 2,792.80 (4c)

Figure 3-46 Employee Tip Income Report Preview

Select Reports > Employee > Employee Tip. The Employee Tip dialog box appears.

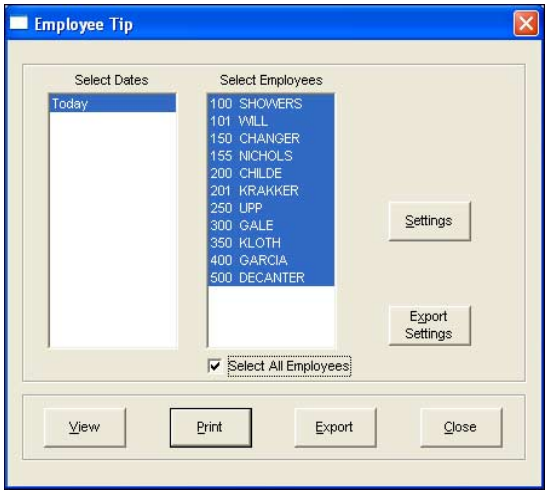


Figure 3-47 Employee Tip Report Dialog Box

Select a single date, or a range of dates, from the selection list. Select an employee from the employee list, or click 'Select All Employees' to include sales information for all employees on the report.

Employee Tip Report Settings

Click Settings to display the Employee Tip Report Settings dialog box.

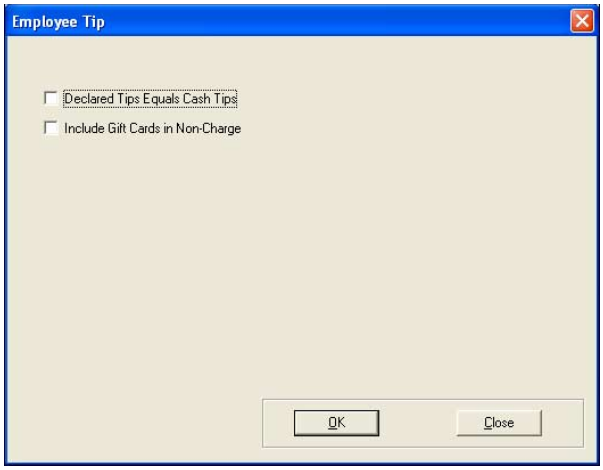


Figure 3-48 Employee Tip Report Settings Dialog Box

Declared Tips Equals Cash Tips — Changes the Total Tips calculation on the Employee Tip report to the tips declared at checkout + charge tips. ***Related Options:*** 'No Minimum Declared Tips' located in Store Settings > Labor > Employee Settings. If you select 'Declared Tips Equals Cash Tips,' the Total Tips calculation assumes 'No Minimum Declared Tips' is selected and you have instructed your employees to declare only their cash tips upon checkout, as Aloha tracks their charge tips. If you do not select 'Declared Tips Equals Cash Tips,' then the Total Tips calculation assumes 'No Minimum Declared Tips' is not selected, and your employees must declare at least the amount of their charge tips upon checkout; however to conform to IRS requirements, employees should declare a total of their cash and charge tips.

Include Gift Cards in Non-Charge — Includes sales and tips fully closed to gift card tenders in the 'Non-Charge' columns, rather than the 'Charge' columns.

The Employee Tip report displays the following columns and rows, with the corresponding line item requirements to populate the 8027 report:

*****Directly Tipped Employees*** —** Heading for employees who clocked in under a job code with 'Order Entry' selected and 'Indirectly Tipped' cleared, as defined in Maintenance > Labor > Job Codes.

Total Sales — Total sales on which the IRS considers tippable, based on the following calculation: tippable sales - tippable sales from checks with auto gratuity applied. This total corresponds with line item 5 on the 8027 report.

Total Tips — Total tips declared by the directly tipped employee. If you select 'Declared Tips Equals Cash Tips,' the calculation is the total tips declared at checkout + charge tips. If you clear 'Declared Tips Equals Cash Tips,' the calculation is the total tips declared at checkout only. Refer to Declared Tips Equals Cash Tips for more information. This total corresponds with line item 4b on the 8027 report.

Total % — Tip percentage for the employee, based on the following calculation: Total Tips amount / Total Sales amount.

Charge Sales — Total tippable sales from checks tendered with a tender configured with 'Allow Tips,' as defined in Maintenance > Payments > Tenders. The system includes checks with multiple tenders if one of the tenders is configured with 'Allow Tips.' If you select 'Include Gift Cards in Non-Charge,' and you fully tender the check with a gift card, then the system does not include the charge. Refer to Include Gift Cards in Non-Charge for more information. This total corresponds with line item 2 on the 8027 report.

Charge Tips — Total tips recorded by the Aloha system. If you select 'Include Gift Cards in Non-Charge,' and you fully tender the check with a gift card, then the system does not include the charge. Refer to Include Gift Cards in Non-Charge for more information. This total corresponds with line item 1 on the 8027 report.

Charge % — Charge tip percentage for the employee. based on the following calculation: Charge Tip amount / Charge Sales amount.

Non Charge Sales — Total tippable sales excluding tips, based on the following calculation: Total Sales amount / Charge Sales amount.

Non Charge Tips — Total tips declared by the employee. If you clear 'Declared Tips Equals Cash Tips,' the calculation is declared tips - charge tips. If you select 'Declared Tips Equals Cash Tips,' the calculation is tips declared at checkout only. Refer to Declared Tips Equals Cash Tips for more information.

Non Charge % — Tip percentage for non-charge sales, based on the following calculation: Non-Charge Tips amount / Non-Charge Sales amount.

Tip Variance — The difference, as a percentage, between charge tips and non-charge tips, based on the following calculation: Charge Tip percentage - Non-Charge Tip percentage.

Sales w/Auto Grat — Total tippable sales, including automatic gratuities.

Auto Gratuity — Total automatic gratuity applied to checks.

*****Indirectly Tipped Employees*** —** Heading for employees who clocked in under a job code with 'Indirectly Tipped' selected, as defined in Maintenance > Labor > Job Codes.

Total Tips — Total tips declared by the indirectly tipped employee. This total corresponds with line item 4a on the 8027 report.

*****Total Tips*** —** Heading for Total Tips.

Total Tips — Total tips based on the following calculation: Directly Tipped Employees Total Tips amount + Indirectly Tipped Employees Total Tips amount. This total corresponds with line item 4c on the 8027 report.

Front-of-House Cash Owed Report

The Front-of-House Cash Owed report lists employees who ring checks, and cash declared and owed. Empty lines for the amount of drops and over/shorts are provided for checkouts. This report lists employees who ring sales, even if a declaration of cash upon checkout is required. The characters ***** print in the Cash Declared column for employees who are not required to declare cash upon checkout, but have rung sales. No amount ($0) prints in the Cash Declared column for employees who must, but do not, declare cash. To force employees to declare cash, the 'Must Declare Cash' check box must be selected for their designated job code. The report displays as shown in Figure 3-49:

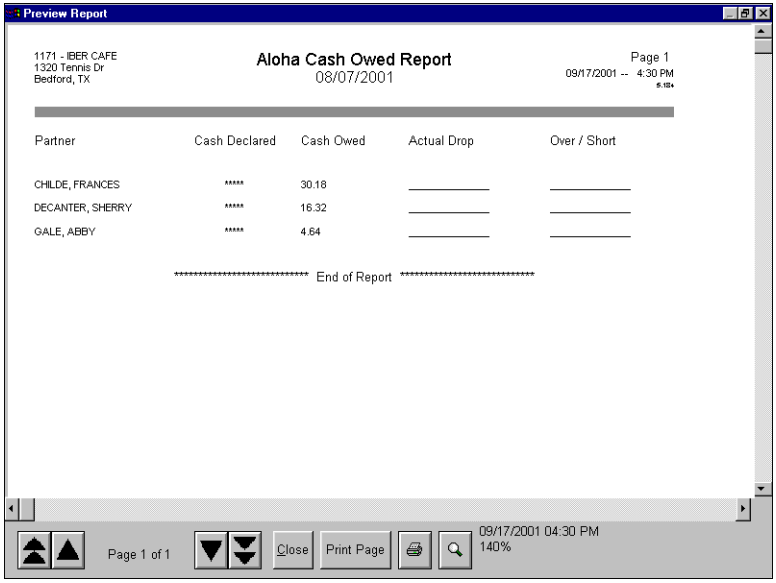


Figure 3-49 Front-of-House Cash Owed Report Preview

Select Reports > Front-of-House Cash Owed and Declared. The Cash Owed Report dialog box appears.

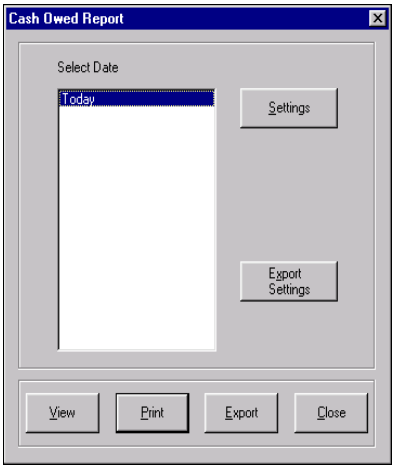


Figure 3-50 Cash Owed Report Dialog Box

Select a single date from the selection list box.

Front-of-House Cash Owed Report Settings

Click Settings to open the Cash Owed Report Settings dialog box.

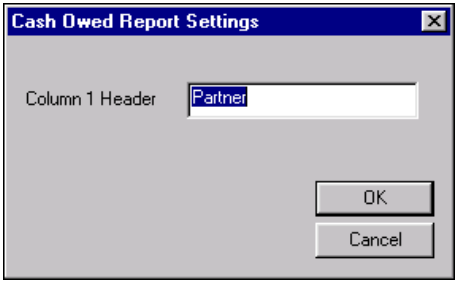


Figure 3-51 Cash Owed Report Settings Dialog Box

Column 1 Header — Designates the Column 1 heading to print on the Cash Owed report.

Make the necessary changes and click OK. The screen returns to the FOH Cash Owed dialog box.

Speed of Service Report

The Speed of Service report displays information pertaining to the speed of processing transactions. This report helps management identify and track potential bottleneck areas of the restaurant and dining experience. The report displays as shown in Figure 3-52:

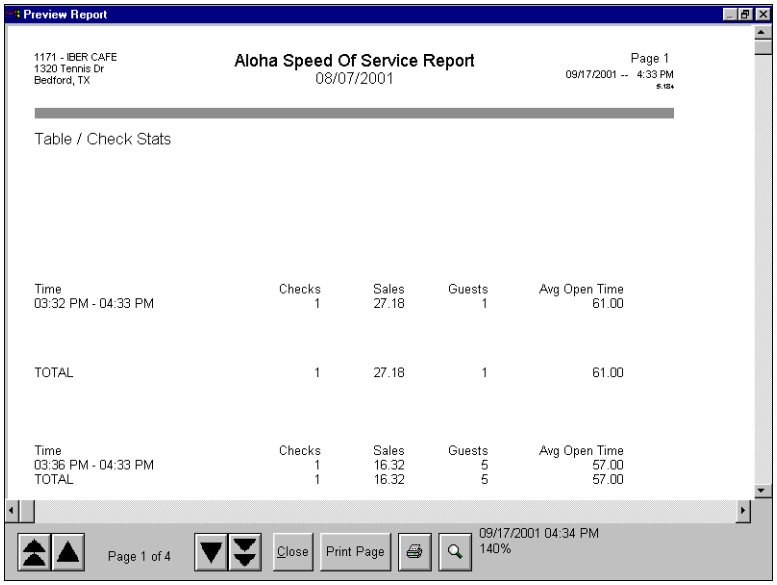


Figure 3-52 Speed of Service Report Preview

Select Reports > Employee > Speed of Service. The Speed of Service Report dialog box appears.

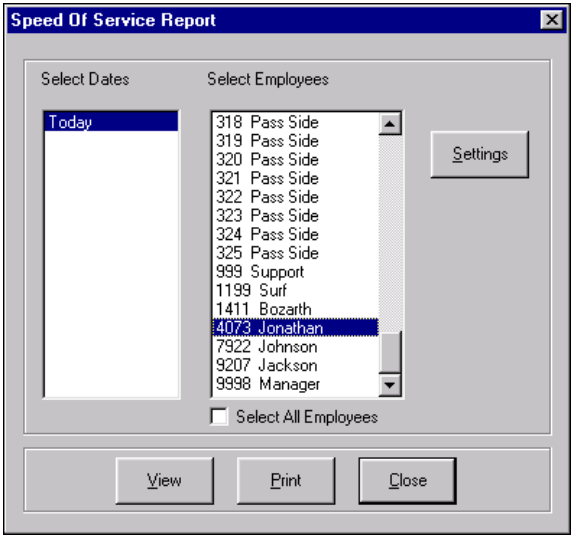


Figure 3-53 Speed of Service Report Dialog Box

Select a single date, or a range of dates, from the selection list. Select an employee from the employee list, or click 'Select All Employees' to include sales information for all employees.

Select All Employees — Selects all employees in the list box.

Speed of Service Report Settings

Click Settings to open the Speed of Service Report Settings dialog box.

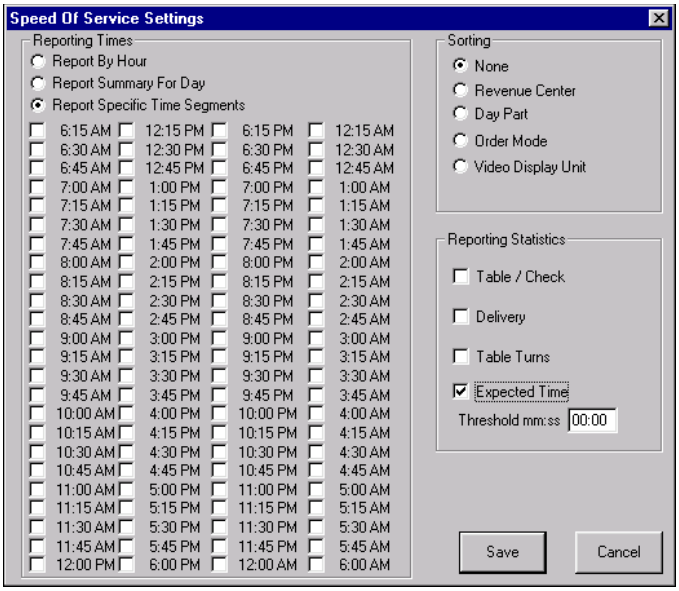


Figure 3-54 Speed of Service Settings Dialog Box

Reporting Times Group Box

Select one of the following reporting time options to use for the Speed of Service report:

Report by Hour — Displays information by the hour.

Report Summary for Day — Displays information for the entire day.

Report Specific Time Segments — Displays information based on specific time segments. This option enables the 15 minute increment check boxes.

Sorting Group Box

Select either Revenue Center, Day Part, Order Mode, Video Display Unit, or Store to define how to group the info on the report.

Reporting Statistics Group Box

Table/Check — Displays table or check information per employee based on the times defined in the Reporting Times group box. The Table/Check option displays the following columns with an ending total:

- The Checks column displays the number of tables or checks opened during the time period.
- The Sales column displays the amount of sales generated during the time period.
- The Guests column displays the number of guests entered during the time period.
- The Avg Open Time column displays the average time of transactions during the time period.

Delivery — Displays delivery information per employee based on the times defined in the Reporting Times group box. The Delivery/Frequent Buyer product must be enabled for data to display. The Delivery option displays the following columns, with an ending total:

- The Order Time column displays how long, in minutes, transactions remained opened, including drive time, based on the following calculation: time the check was closed - time the check was opened.
- The Kitchen Time column displays the time spent preparing the order, based on the following calculation: time the driver signed out - time the check was entered.
- The Driver Time column displays the drive time for the order based on the following calculation: time the driver signed out - time the driver signed in.

Table Turns — Displays the average length of time between table turns per employee. The Table Turns option displays the following columns:

- The Table Turns column displays the length of time it took a table to turn based on the following calculation: time the last payment was applied - time the check was opened.
- The Open Time column displays the length of time a table was open based on the following calculation: time the check was closed - time the same check was opened.

Time and Attendance Detail Report

The Time and Attendance Detail report provides the ability to report employee time in and out by day, report employee breaks by day, report time adjustments, report edit punch reasons and who edited the punch, and provide a signature line and check number line. The report displays, as shown in Figure 3-55:

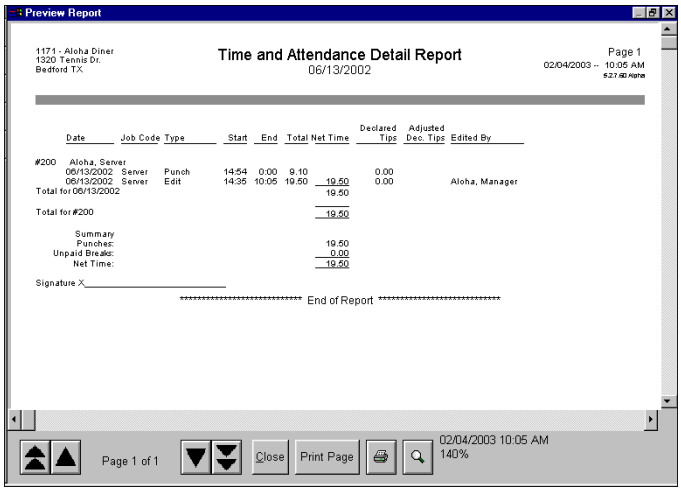


Figure 3-55 Time and Attendance Report

Select Reports > Employee > Time and Attendance Detail. The Time and Attendance Detail Report dialog box appears.

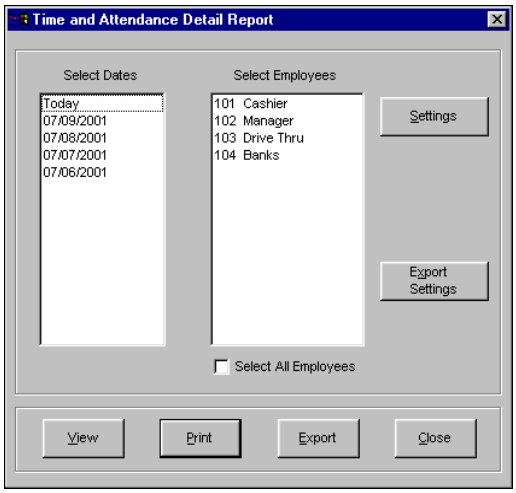


Figure 3-56 Time and Attendance Detail Report Dialog Box

Select a single date, or a range of dates, from the selection list. Select an employee from the employee list, or click 'Select All Employees' to include time and attendance information for all employees.

Select All Employees — Selects all employees in the list box.

Time and Attendance Detail Report Settings

Click Settings to open the Time and Attendance Detail Report Settings dialog box.

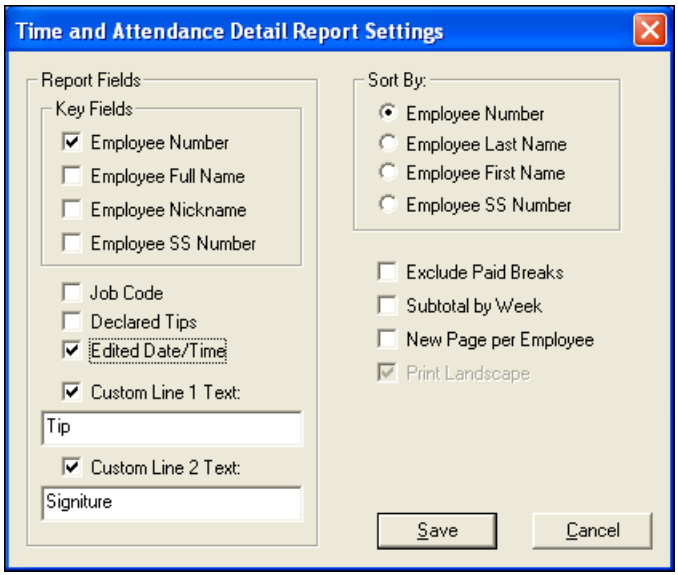


Figure 3-57 Time and Attendance Detail Report Settings Dialog Box

Exclude Paid Breaks — Excludes paid break entries on the report.

Subtotal by Week — Includes a subtotal for the total net time worked by the employee, per week.

New Page per Employee — Begins a new page for each employee.

Print Landscape — Prints the report in landscape format.

Report Fields Group Box

Employee Number — Includes the ID number for the employee.

Employee Full Name — Includes the first and last name of the employee.

Employee Nickname — Includes the nickname of the employee.

Employee SS Number — Includes the social security number of the employee.

Job Code — Includes the job code of the employee by each edited punch.

Declared Tips — Includes the amount of tips the employee declared.

Edited Date/Time — Includes the date and time for punches edited by an employee. ***Related Options:*** If you select 'Edit Date/Time' and 'Use Edit Punch Reasons' in Maintenance > Store Settings > Labor group > Employee Settings, the system forces the 'Print Landscape' option without the ability to clear it.

Custom Line 1 Text — Allows you to add an extra line to print, such as 'Employee Signature X_____'. Type up to 80 alphanumeric characters.

Custom Line 2 Text — Allows you to add a second extra line to print, such as 'Check #_____'. Type up to 80 alphanumeric characters.

Sort By Group Box

Sorts the Time and Attendance Detail report by employee identification. Select either Employee Number, Employee Last Name, Employee First Name, or Employee SS Number.

The Time and Attendance Detail report displays the following columns:

Employee — Designates the employee ID number and name.

Date — Designates the date the employee worked.

Jobcode — Designates the job code in which the employee worked.

Type — Designates the type of punch, such as 'Punch', 'Unpaid Break', and 'Paid Break'. You can edit all three types.

Start — Designates the time, in military hours, the employee clocked in.

End — Designates the time, in military hours, the employee clocked out.

Total — Designates the total number of hours the employee worked, based on the following calculation: End total - Start total.

Net Time — Designates the adjusted total number of hours worked by the employee, minus the unpaid breaks.

Declared Tips — Designates the total amount of tips the employee declared.

Adjusted Declared Tips — Designates the total amount of tips the employee declared after adjustments, such as an 'adjust tip' action.

Edited By — Designates the name of the employee who edited the punch.

Reason — Designates the selected reason for performing the punch. If Edit Punch Reasons are not in use, then the column does not display.

Edited Punches Report

The Edited Punches report contains a listing of time and attendance information that has been edited using the Edit Punches utility. When the Edit Punch Reasons feature is in use, the reason displays as a separate line item under each punch. ‘None’ indicates Edit Punch Reasons are in use, but the data is prior to the implementation of the feature. The report displays as shown in Figure 3-58:

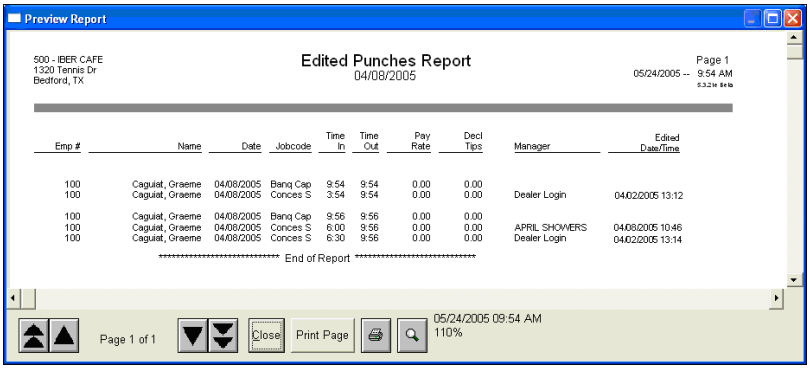
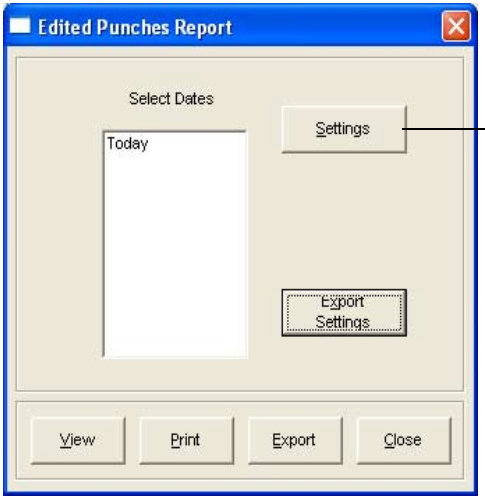


Figure 3-58 Edited Punches Report Preview

Select Reports > Employee > Edited Punches. The Edited Punches Report dialog box appears.



The Settings button does not appear for employees who have the Edit option cleared for the Edited Punches report in Maintenance > Labor > Back Office Security Levels.

Figure 3-59 Edited Punches Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Click Settings to display the Edit Punches Report Settings dialog box.

Figure 3-60 Edit Punches Report Settings

Edited Date/Time — Includes the date and time the employee edited the punch. When you select this option, the system forces the report to print in landscape rather than portrait format.

Suppress Pay Rate Information — Does not display the Pay Rate column on the Edited Punches report. Use this option for establishments that employ hourly managers and pay rate information is sensitive.

To prevent hourly employees from viewing pay rate information on the Edit Punches report, the general manager should select 'Suppress Pay Rate Information,' on the Edit Punches Report Settings dialog box, click Save, then control the rights to changing the settings for the Edited Punches report through back office security levels. With proper security levels, managers who are paid hourly cannot access the Settings button, and, therefore, cannot change the report to dis-

play pay rates. Managers who are paid on salary and have editing rights, can access the Settings button to change the configuration to make pay rates visible, if needed.

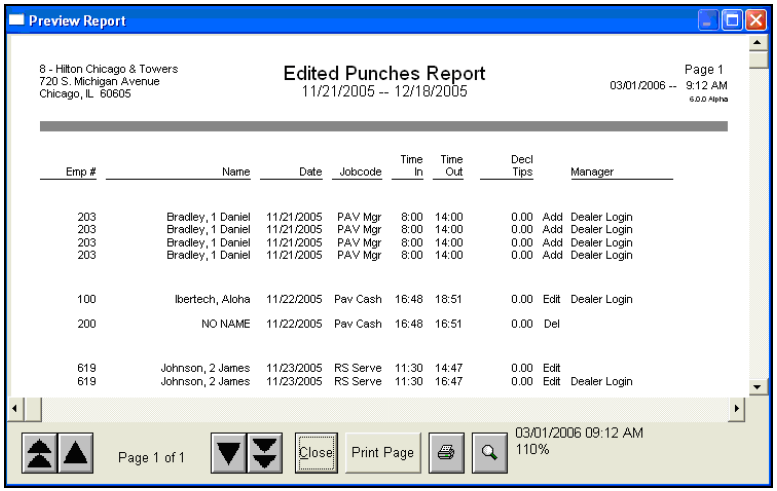


Figure 3-61 Edited Punches Report without Pay Rate Information

The Edited Punches report displays the following columns:

Emp# — Displays the ID number of the employee.

Name — Displays the name of the employee.

Date — Displays the date of business for the shift.

Jobcode — Displays the job code under which the employee clocked in.

Time In — Displays the clock in time for the shift.

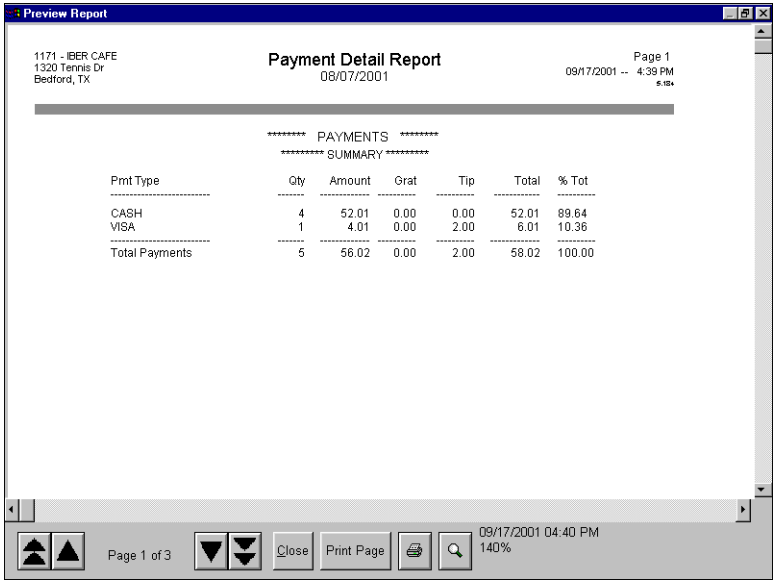
Time Out — Displays the clock out time for the shift.

Pay Rate — Displays the pay rate for the employee.

Manager — Displays the name of the manager who edited the shift.

Payments Report

The Payments report contains detailed payment information pertaining to cash, credit cards, promos, comps, and manager meals tendered in the FOH. When the comp or promo is applied by the manager, the manager's name displays on the report. The report displays as shown in Figure 3-62:



Preview Report

1171 - IBER CAFE
1320 Tennis Dr
Bedford, TX

Payment Detail Report
08/07/2001

Page 1
09/17/2001 -- 4:39 PM
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********* PAYMENTS *********
********* SUMMARY *********

Pmt Type	Qty	Amount	Grat	Tip	Total	% Tot
CASH	4	52.01	0.00	0.00	52.01	89.64
VISA	1	4.01	0.00	2.00	6.01	10.36
Total Payments	5	56.02	0.00	2.00	58.02	100.00

Page 1 of 3 Close Print Page 09/17/2001 04:40 PM 140%

Figure 3-62 payment Detail Report Preview

Select Reports > Payments. The Payment Detail Report dialog box appears.

Figure 3-63 Payment Detail Report Dialog Box

Select a single date, or a range of dates from the selection list.

Payment Detail Report Settings

Click Settings to open the Payment Detail Report Settings dialog box used to control the manner in which the data is printed on the report.

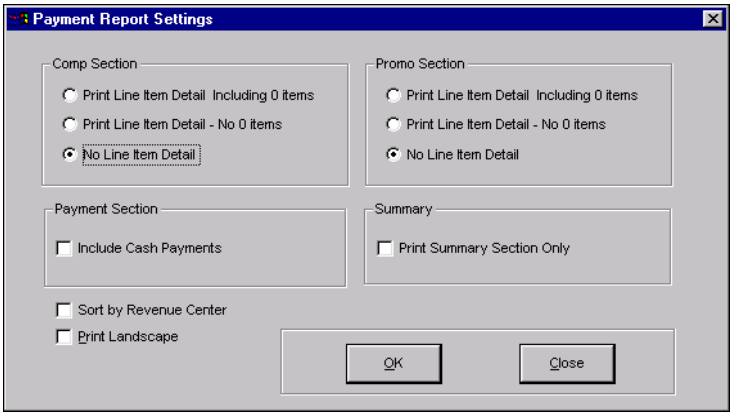


Figure 3-64 Payment Detail Report Settings Dialog Box

The following check boxes provide additional latitude in how the data for the specified field is printed:

Sort by Revenue Center — Displays the report by revenue center.

Print Landscape — Prints the report in landscape format.

Comp Section and Promo Section Group Boxes

Both sections have three print options. Only one print option can be selected per section.

Print Line Item Detail Including 0 Items — Prints detail for all items, including those with zero amounts.

Print Line Item Detail - No 0 Items — Prints detail only for those items that do not have a zero amount.

No Line Item Detail — Excludes the printing of item detail.

Payment Section Group Box

Include Cash Payments — Includes cash payments on the report.

Summary Group Box

Print Summary Section Only — Prints a summary of the report detail only. The details are not printed.

Make the necessary changes and click OK. The screen returns to the Payment Detail Report dialog box.

The Payment Detail report provides the following columns for each payment, comp, or promo:

Check # — Displays the guest check number.

Card # — Displays the credit card number.

You can fully or partially mask the credit card or debit card number with the 'Credit Card Number Mask' setting in Store Settings > Credit Card > EDC Setup.

Exp — Displays the expiration date of the credit card.

Quantity — Indicates the number of times the payment, comp, or promo was applied.

Amount — Displays the total sales amount. For comps and promos, this displays the reduction amount.

Grat — Indicates the amount of automatic gratuity.

Tip — Indicates the tip amount.

Total — Indicates the total amount applied to the check, based on the following calculation: amount + grat + tip.

Emp — Displays the employee who started the check for the corresponding payment, comp, or promo.

Mgr — Displays the manager who entered the comp or promo due to an employee who did not have access required to apply it.

Time — Indicates the time the comp was applied.

Name/Item — Displays the name of the item that was comped. If multiple items on the check were comped, the text displays as 'Not Available'.

Unit — Indicates the unit number of the comp, if entered.

% Total — Indicates the percentage of the comp or promo reduction compared to the total amount, based on the following calculation: check's comp amount ÷ total comp amount OR check's promo amount ÷ total promo amount.

House Account Report

The House Account report allows for the printing of house account invoices for use when billing customers.

Select Reports > House Account. The House Account function tab appears.:

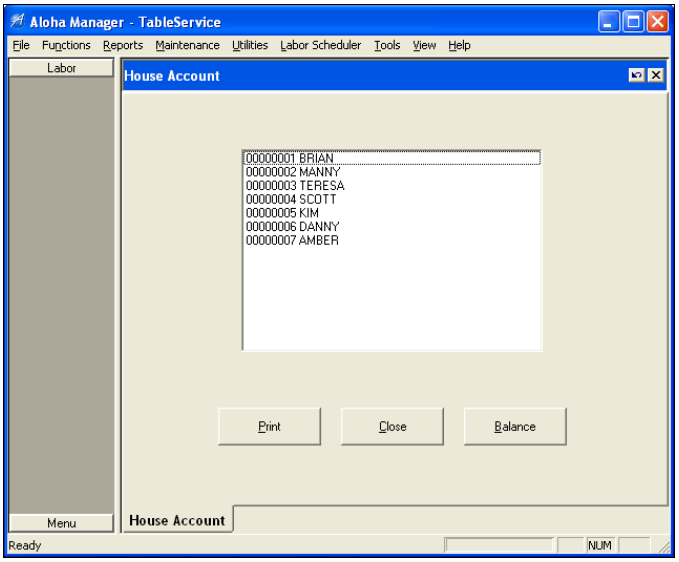


Figure 3-65 House Accounts

Print Button

Select a single account from the list and click Print to print an individual invoice. To print invoices for multiple accounts, hold down the Shift key, select the desired accounts, and click Print.

Balance Button

Click Balance to consolidate all existing transactions on the accounts and create balance forward totals that display on statements as a previous balance. This is normally done after printing statements for the current month. Infrequent consolidation creates long statements, and premature consolidation drops transaction detail from the current statements.

Product Mix Report

The Product Mix (PMix) report contains a total list of items sold for a selected day. Filter it by specific categories or by terminal. The item detail, such as quantity sold, amount of sale, profit, and percentage of category sales, is also listed for each item.

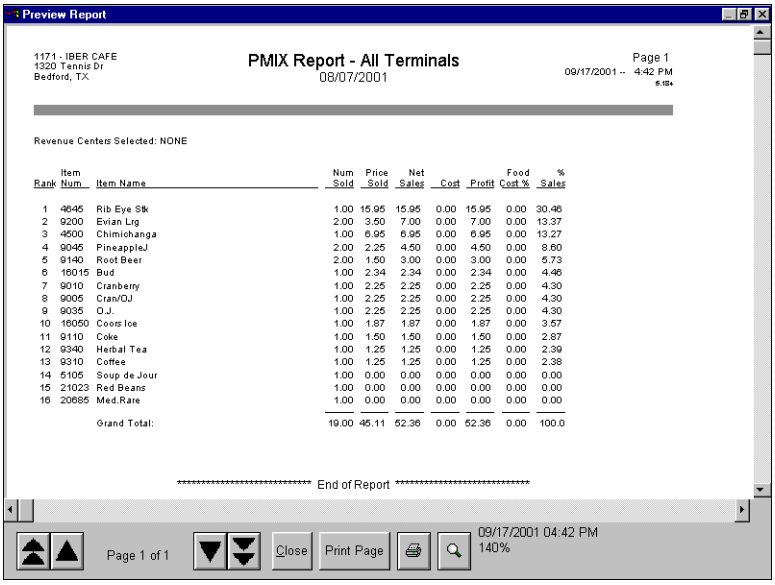
When you select multiple days to report, the Product Mix report generates configuration data from the most recent dated subdirectory in your selection. Using RPT.INI, you can change this functionality to use the configuration data from the most recent dated subdirectory available in the selection list (TODAY). For example, in the most recent dated subdirectory, item #100 is named 'Nachos', but when you run the report, you select an older dated subdirectory. In this subdirectory, item #100 is named 'Apple Pie'. Item #100 lists as 'Nachos' on the report, as this is the current configuration.

To enable the PMix report to display current configuration data:

1. Select **Start > Programs > Accessories > Notepad**.
2. Type **[Ibertech]** and press **Enter**.
3. Type **PmixData=True** and press **Enter**.
4. Click **File > Save**.
5. Type **RPT.INI** in the 'File Name' field.
6. Click **Save** and place the file in the Newdata directory.

There are two display options for the Product Mix report:

- The **Summary Product Mix** report displays information for a selected date(s).



Preview Report

1171 - IBER CAFE
1320 Tennis Dr
Bedford, TX

PMIX Report - All Terminals
08/07/2001

Page 1
09/17/2001 -- 4:42 PM
5.184

Revenue Centers Selected: NONE

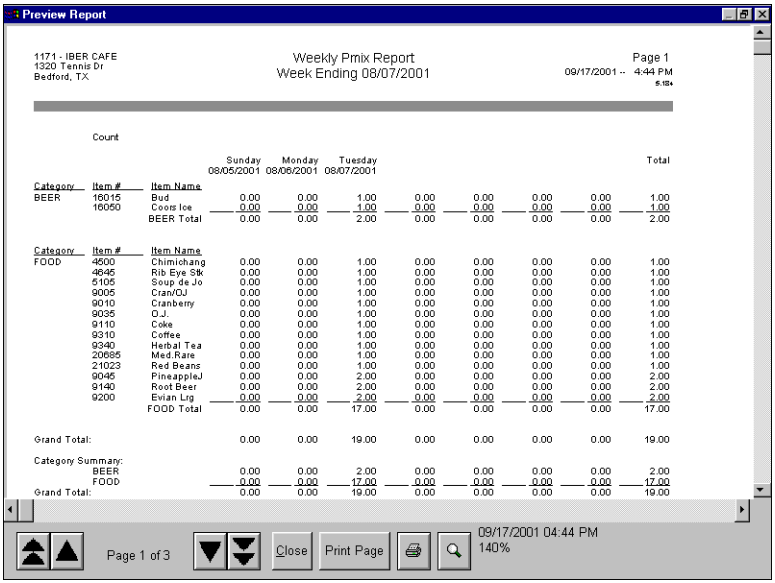
Rank	Item Num	Item Name	Num Sold	Price Sold	Net Sales	Cost	Profit	Food Cost %	% Sales
1	4646	Rib Eye Stk	1.00	15.95	15.95	0.00	15.95	0.00	30.46
2	9200	Evian Lrg	2.00	3.50	7.00	0.00	7.00	0.00	13.37
3	4500	Chimichanga	1.00	6.95	6.95	0.00	6.95	0.00	13.27
4	9045	PineappleJ	2.00	2.25	4.50	0.00	4.50	0.00	8.60
5	9140	Root Beer	2.00	1.50	3.00	0.00	3.00	0.00	5.73
6	16015	Bud	1.00	2.34	2.34	0.00	2.34	0.00	4.46
7	9010	Cranberry	1.00	2.25	2.25	0.00	2.25	0.00	4.30
8	9005	Cran/OJ	1.00	2.25	2.25	0.00	2.25	0.00	4.30
9	9035	O.J.	1.00	2.25	2.25	0.00	2.25	0.00	4.30
10	16050	Coors Ice	1.00	1.87	1.87	0.00	1.87	0.00	3.57
11	9110	Coke	1.00	1.50	1.50	0.00	1.50	0.00	2.87
12	9340	Herbal Tea	1.00	1.25	1.25	0.00	1.25	0.00	2.39
13	9310	Coffee	1.00	1.25	1.25	0.00	1.25	0.00	2.38
14	5105	Soup de Jour	1.00	0.00	0.00	0.00	0.00	0.00	0.00
15	21023	Red Beans	1.00	0.00	0.00	0.00	0.00	0.00	0.00
16	20685	Med.Rare	1.00	0.00	0.00	0.00	0.00	0.00	0.00
		Grand Total:	19.00	45.11	52.36	0.00	52.36	0.00	100.0

********** End of Report **********

Page 1 of 1 Close Print Page 09/17/2001 04:42 PM 140%

Figure 3-66 PMix Report Summary Preview

- The **Weekly Product Mix** report displays information for a selected week(s).



Preview Report

1171 - IBER CAFE
1320 Tennis Dr
Bedford, TX

Weekly Pmix Report
Week Ending 08/07/2001

Page 1
09/17/2001 -- 4:44 PM
5.184

Count

Category	Item #	Item Name	Sunday 08/05/2001	Monday 08/06/2001	Tuesday 08/07/2001					Total
BEER	16015	Bud	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	16050	Coors Ice	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
		BEER Total	0.00	0.00	2.00	0.00	0.00	0.00	0.00	2.00
Category	Item #	Item Name								
FOOD	4500	Chimichang	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	4645	Rib Eye Stk	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	5105	Soup de Jo	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9005	Cran/OJ	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9010	Cranberry	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9035	O.J.	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9110	Coke	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9310	Coffee	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9340	Herbal Tea	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	20685	Med.Rare	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	21023	Red Beans	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00
	9045	PineappleJ	0.00	0.00	2.00	0.00	0.00	0.00	0.00	2.00
	9140	Root Beer	0.00	0.00	2.00	0.00	0.00	0.00	0.00	2.00
	9200	Evian Lrg	0.00	0.00	2.00	0.00	0.00	0.00	0.00	2.00
		FOOD Total	0.00	0.00	17.00	0.00	0.00	0.00	0.00	17.00
Grand Total:			0.00	0.00	19.00	0.00	0.00	0.00	0.00	19.00
Category Summary:										
		BEER	0.00	0.00	2.00	0.00	0.00	0.00	0.00	2.00
		FOOD	0.00	0.00	17.00	0.00	0.00	0.00	0.00	17.00
Grand Total:			0.00	0.00	19.00	0.00	0.00	0.00	0.00	19.00

Page 1 of 3 Close Print Page 09/17/2001 04:44 PM 140%

Figure 3-67 PMix Report Weekly Preview

The PMix report displays the following columns:

Item # — Displays the item number.

Item Name — Displays the name of the item.

Num Sold — Displays the quantity sold.

Price Sold — Displays the calculated price from which the item is sold. Calculations are less inclusive taxes if 'Include Inclusive Taxes' is cleared in the Settings dialog box.

Amount — Displays the calculated value, based on the following calculation: (num sold) x (price sold).

Cost — Displays the cost of the item value, based on the following calculation: (item cost) x (num sold).

Profit — Displays the profit of the item, based on the following calculation: amount - cost.

Food Cost % — Displays the calculated value, based on the following calculation: cost ÷ amount.

% Sales — Displays the calculated value, based on the following calculation: amount ÷ grand total amount.

Select Reports > Product Mix > Product Mix or Reports > Product Mix > Weekly to access the corresponding report. The Product Mix Report dialog box appears.

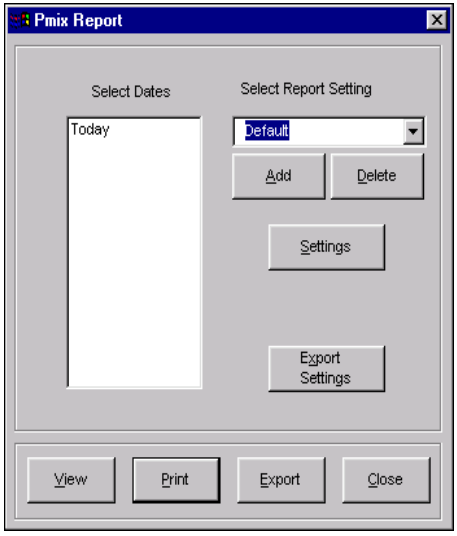


Figure 3-68 PMix Report Dialog Box

Select a single date or a range of dates from the selection list.

Product Mix Report Settings

Click Settings to open the Product Mix Report Settings dialog box used to control the manner in which the data is printed on the report. The Product Mix Report Settings dialog box displays with the Settings dialog box displayed.

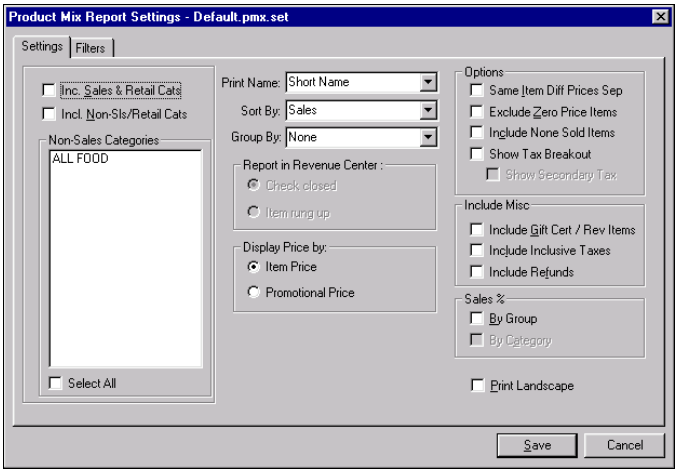


Figure 3-69 Product Mix Report Settings Dialog Box

Settings Tab

The following check boxes and their effect on the final output are:

Include Sales/Retail Categories — Includes all sales and retail categories on the report.

Include Non-Sales/Retail Categories — Includes all non-sales and retail categories on the report. Works in conjunction with the 'Non-Sales Categories' list box. Select one or more of the category names from the 'Non-Sales Categories' list box to include on the report.

Select All Cats — Includes all categories on the report.

Print Name — Determines the item name to print on the report. Select from 'Short Name', 'Long Name', or 'Chit Name'.

Sort By — Determines the sorting method used to print the report. Select between 'Sales', 'Quantity Sold', 'Profitability' or 'Item Num'.

Group By — Groups the report by a particular attribute. You can group by 'None,' 'Category,' 'Concept,' 'Employee,' 'Employee by Category,' 'Day Part,' 'Day Part by Category,' 'Revenue Center,' 'Revenue Center by Category,' 'Sales Type,' and 'Sales Type by Category.'

Category — Groups items by category assigned to the item.

Concept — Groups items by the concept assigned to the item. This option is only available for the Weekly Product Mix report.

Employee — Groups items by the employee entering the item.

Employee by Category — Groups items by the employee entering the item, by category.

Day Part — Groups items by the day part in which the item on the check is tendered.

Day Part by Category — Groups items by the day part in which the item on the check is tendered, by category.

Revenue Center — Groups items by the revenue center in which the item on the check is tendered.

Revenue Center by Category — Groups items by the revenue center in which the item on the check is tendered, by category.

Sales Type — Groups items by sales type, or order attributes, assigned to the check. The sales types appear in the order defined in OrdAttr.txt in the \Data and \NewData directories. If you did not assign a sales type to a specific check, then the items, and the item

count, display under the NOT SELECTED section. This option is not available for the Weekly Product Mix report.

500 - Iber Café
1320 Tennis Drive
Bedford, TX

PMIX Report - All Terminals
03/01/2005 - 03/31/2005

Page 1 of n
04/22/2005 -- 2:03 PM
5.3.21

Revenue Centers Selected: ALL

Sales Type	Item Num	Item Name	Num Sold	Price Sold	Amount	Cost	Profit	Food Cost %	% Sales
NOT SELECTED	9145	Slice	2.00	1.50	3.00	0.00	3.00	0.00	6.00
	9155	Sprite	3.00	1.75	5.25	0.00	5.25	0.00	10.00
	9100	Coke	5.00	2.00	10.00	0.00	10.00	0.00	19.00
		Tot NOT SELECTED:	10.00	5.25	18.25	0.00	18.25	0.00	35.00
Member	9145	Slice	3.00	1.50	4.50	0.00	4.50	0.00	9.00
	9160	Root Beer	5.00	1.75	8.75	0.00	8.75	0.00	17.00
	9100	Coke	6.00	0.50	3.00	0.00	3.00	0.00	6.00
		Tot Member:	14.00	3.75	16.25	0.00	16.25	0.00	32.00
Non-Member	9160	Root Beer	4.00	1.75	7.00	0.00	7.00	0.00	13.00
	9100	Coke	1.00	0.50	0.50	0.00	0.50	0.00	1.00
	9250	Orange	8.00	1.25	10.00	0.00	10.00	0.00	19.00
		Tot Non-Member:	13.00	3.50	17.50	0.00	17.50	0.00	33.00
		Grand Total:	37.00	12.50	52.00	0.00	52.00	0.00	100.00

Figure 3-70 Product Mix Report Grouped by Sales Type

Sales Type by Category — Groups items by sales type or order attributes assigned to the check, by category. The sales types appear in the order defined in OrdAttr.txt in the \Data and \Newdata directories, then by category ID. If you did not assign a sales type to a specific check, then the items, and the item count, display under the NOT SELECTED

section. A summary section prints at the end of the report. This option is not available for the Weekly Product Mix report.

500 - Iber Café
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PMIX Report - All Terminals
03/01/2005 - 03/31/2005

Page 1 of n
04/22/2005 – 2:03 PM
5.3.21

Revenue Centers Selected: ALL

Sales Type	Category	Item Num	Item Name	Num Sold	Price Sold	Amount	Cost	Profit	Food Cost %	% Sales
NOT SELECTED	BEVS	9145	Slice	2.00	1.50	3.00	0.00	3.00	0.00	2.08
		9155	Sprite	3.00	1.75	5.25	0.00	5.25	0.00	3.63
		9100	Coke	5.00	2.00	10.00	0.00	10.00	0.00	6.92
			Tot BEVS:	10.00	5.25	18.25	0.00	18.25	0.00	12.63
	FOOD	1400	Burger	5.00	5.00	25.00	0.00	25.00	0.00	17.30
		1600	French Fries	6.00	2.50	15.00	0.00	15.00	0.00	10.38
			Tot FOOD:	11.00	7.50	40.00	0.00	40.00	0.00	27.68
			Tot NOT SELECTED:	21.00	12.75	58.25	0.00	58.25	0.00	40.31
Member	BEVS	9145	Slice	3.00	1.50	4.50	0.00	4.50	0.00	3.11
		9160	Root Beer	5.00	1.75	8.75	0.00	8.75	0.00	6.06
		9100	Coke	6.00	0.50	3.00	0.00	3.00	0.00	2.08
			Tot BEVS:	14.00	3.75	16.25	0.00	16.25	0.00	11.25
	FOOD	1400	Burger	3.00	5.00	15.00	0.00	15.00	0.00	10.38
		1600	French Fries	10.00	2.50	25.00	0.00	25.00	0.00	17.30
			Tot FOOD:	13.00	7.50	40.00	0.00	40.00	0.00	27.68
			Tot Member:	27.00	11.25	56.25	0.00	56.25	0.00	38.93
Non-Member	BEVS	9160	Root Beer	4.00	1.75	7.00	0.00	7.00	0.00	4.84
		9100	Coke	1.00	0.50	0.50	0.00	0.50	0.00	0.35
		9250	Orange	8.00	1.25	10.00	0.00	10.00	0.00	6.92
			Tot BEVS:	13.00	3.50	17.50	0.00	17.50	0.00	12.11
		1400	Burger	2.00	5.00	10.00	0.00	10.00	0.00	6.92
		1600	French Fries	1.00	2.50	2.50	0.00	2.50	0.00	1.73
			Tot FOOD:	3.00	7.50	12.50	0.00	12.50	0.00	8.65
			Tot Non-Member:	16.00	11.00	30.00	0.00	30.00	0.00	20.76
			Grand Total:	64.00	35.00	144.50	0.00	144.50	0.00	100.00

Figure 3-71 Product Mix Report Grouped by Sales Type by Category

Print Landscape — Prints the report in landscape format.

Report in Revenue Center Group Box

Check Closed — Includes items from closed checks.

Item Rung Up — Includes items that were ordered.

Display Price By Group Box

First Item Ordered — Reports sales of items from the revenue center in which the item is ordered.

Item Rung Up — Reports sales of items from the revenue center in which the item is rung up.

Option Group Box

Same Item with Different Prices Separated — Separates the same item which has different prices, separately. For example, if an item is placed on a submenu at $5.99, and also on a modifier at $0.99, the item displays on the report as two entries.

Exclude Zero Price Items — Excludes items with a zero price. For example, modifiers without an associated price, does not display on the report.

Include None Sold Items — Includes all defined items whether sold or not, in the report.

Show Tax Breakout — Displays items with different taxes as separate entries. For example, if an item is defined at 8.25% on dine in orders, and 5% on to go orders, an entry displays for each.

Show Secondary Tax — Displays an entry for items with a secondary tax.

Include Misc Group Box

Include Gift Cert/Rev Items — Includes the gift certificate items in the report.

Include Inclusive Taxes — Includes inclusive taxes on the report.

Include Refunds — Includes refunds in the report.

Sales % Group Box

By Group — Calculates the percentage of the total sales based on the selection in the Group By group box. For example, if Employee is selected, the report reflects the percentage of total net sales and total gross sales by employee.

By Category — Calculates the percentage of the total sales based on the selected categories. For example, if Select All Cats is selected, the report reflects the percentage of total net sales and total gross sales by all categories.

Filters Tab

Click the Filters tab to drill down to specific aspects of the establishment, such as revenue center, terminal, or menu. The Filters tab appears.

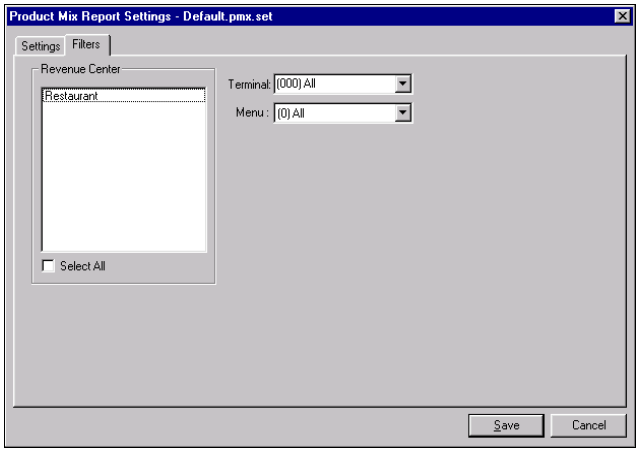


Figure 3-72 Filters Tab

Revenue Center — Filters the report to include data for the selected revenue center(s) only. Click Select All to include data from all revenue centers.

Terminal — Filters the report to include data from the selected terminal only. Select all to include data from all terminals.

Menu — Filters the report to include data for items on the selected menu only. Select all to include data from all menus.

Quick Count Report

The Quick Count report displays the tracking and projected counts for items defined as tracking items in the Quick Count product. Quick Count must be enabled for data to display.

Refer to the Quick Count Feature Focus Guide for more information on the Quick Count feature.

Select Reports > Quick Count. The Weekly Quick Count Report dialog box appears.

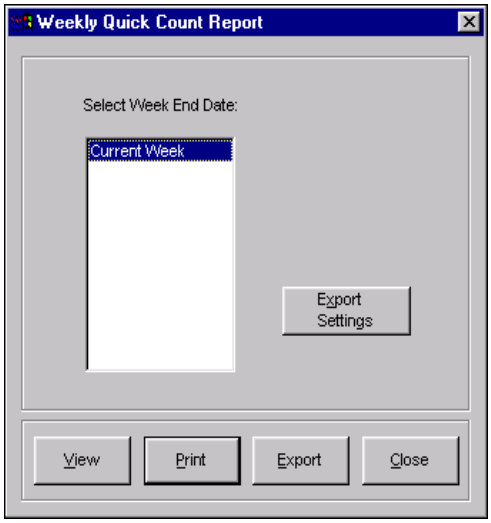


Figure 3-73 Weekly Quick Count Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Menu Item Prices by Name Report

The Item Prices by Name Report prints all item prices, sorted by name, per category. Also included is every submenu and modifier group attached to the item. The price reflects the price at which the item is sold. Select Reports > Menu Item Prices by Name to access the report.

Menu Item Prices by Number Report

The Item Prices by Number report prints all item prices, by the item ID number, per category. Also included is every submenu and modifier group attached to the item. The price reflects the price at which the item is sold. Select Reports > Menu Item Prices by Number to access the report.

Delivery Driver Report

The Delivery Driver report provides a detailed listing of delivery trips, and works in conjunction with the Delivery/Frequent Buyer product. This report includes the driver's name, average trip time, total trips, average order time, and total orders.

Select Reports > Delivery Driver Report. The Delivery Driver Report dialog box appears.

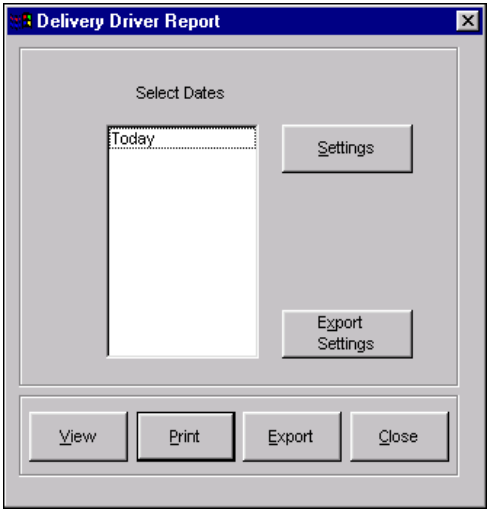


Figure 3-74 Delivery Driver Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Delivery Driver Report Settings

Click Settings to display the Delivery Driver Report Settings dialog box.

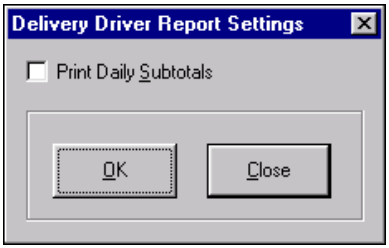


Figure 3-75 Delivery Driver Report Settings Dialog Box

Print Daily Subtotals — Includes daily subtotals on the report

Make the necessary changes and click OK. The screen returns to the Delivery Driver report dialog box.

Delivery Production Report

The Delivery Production report provides a detailed listing of delivery trips, such as the starting, ending, and average time.

Select Reports > Delivery Production. The Delivery Production Report dialog box appears.

Figure 3-76 Delivery Production Report Dialog Box

Select a single date, or a range of dates, from the selection list.

Delivery Production Report Settings

Click Settings to open the Delivery Driver Report Settings dialog box.

Figure 3-77 Delivery Production Report Settings Dialog Box

Report Interval — Sets the time interval to use when displaying the report information. Select in 30 minute intervals with 1:00 representing an hour.

Set the report interval and click OK. The screen returns to the Delivery Production Report dialog box.

Voids Report

The Voids report provides a detailed listing of voids performed in the FOH. A void is any item that has been committed to an order mode, such as dine in, and then deleted before the check is closed. The order entry check window also displays the word (VOID) under the voided item. The report displays as shown in Figure 3-78:

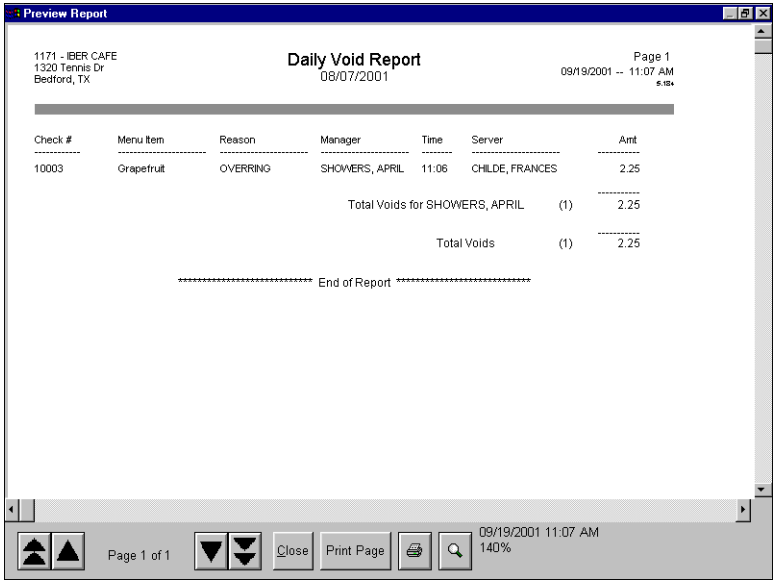


Figure 3-78 Void Reason Preview

Select Reports > Void. The Void Report dialog box appears.

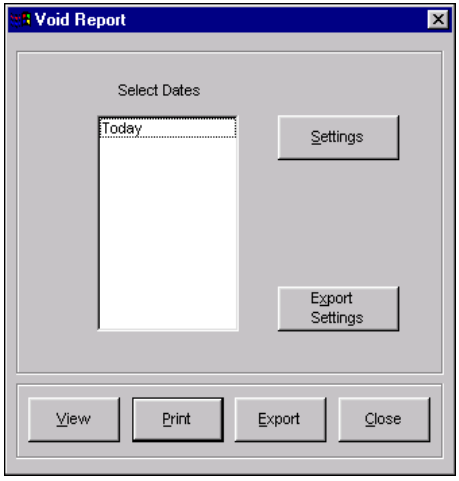


Figure 3-79 Void Report Dialog Box

Select a single date, or a range of dates, from the selection list.

If an employee is assigned to a job code with the 'Allow to Void Own Items' check box selected, they do not have to choose a void reason. The Void Report displays 'Void Reason UNKNOWN' on their transactions.

Void Report Settings

Click Settings to open a report configuration dialog box used to control the manner in which data is printed on the report.

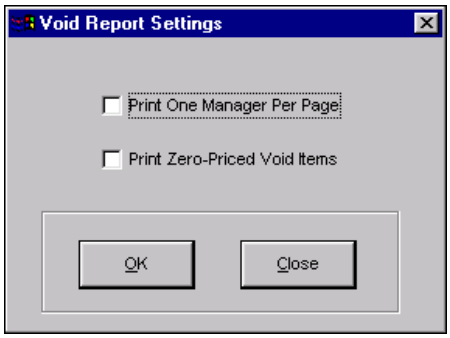


Figure 3-80 Void Report Settings Dialog Box

Print One Manager Per Page — Starts the report on a new page for each manager.

Print Zero-Priced Void Items — Includes all zero-priced items that were voided, such as modifiers.

Make the necessary changes and click OK. The screen returns to the Void Report dialog box.

The Void report contains the following columns:

Check # — Displays the guest check number containing the voided item.

Menu Item — Displays the name of the voided item.

Reason — Denotes the selected reason the item was voided.

Manager — Displays the name of the manager performing the void.

Time — Indicates the time of the void.

Server — Displays the tippable employee who started the check containing the voided item(s).

Amt — Indicates the amount of the voided item(s).

Surcharges Report

The Surcharges report provides a detailed listing of all surcharges collected in the FOH. Surcharges are additional charges that occur when specific items are sold. It is primarily used in Florida where each alcoholic drink sold has a surcharge accessed to it. It is then up to the restaurant to decide whether they will explicitly charge the cost to the guest, or reduce it as a cost of business. If the restaurant is collecting the money from the guest, the charge shows up as a line item on the guest check. If the restaurant is not collecting money from the guest, the charge shows up as an expense and is deducted for the Net Sales calculation. When a surcharge is assessed on the item, the amount accumulates as a collected surcharge or a not-collected surcharge. Collected surcharges add to the gross sales total.

Surcharges, used for such things as cover charges, are defined in Maintenance > Menu > Surcharges. The report displays as shown in Figure 3-81:

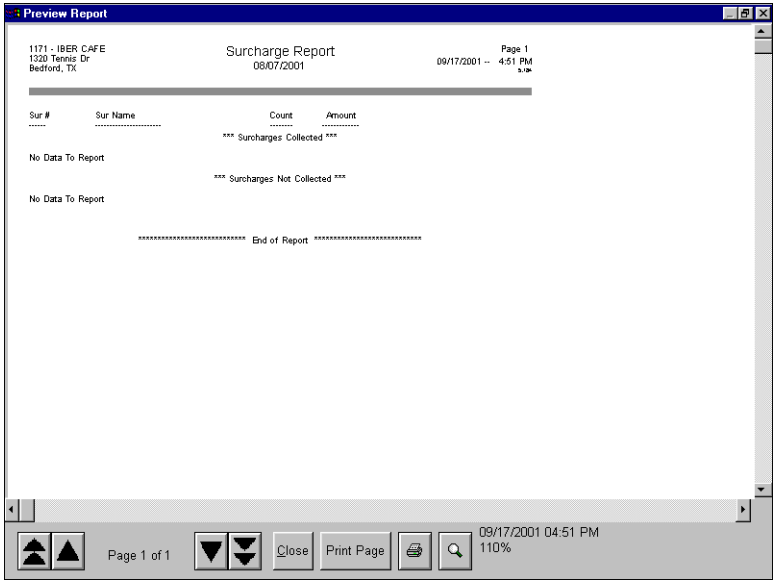


Figure 3-81 Surcharges Report Preview

Select Reports > Surcharges. The Surcharges report dialog box appears.

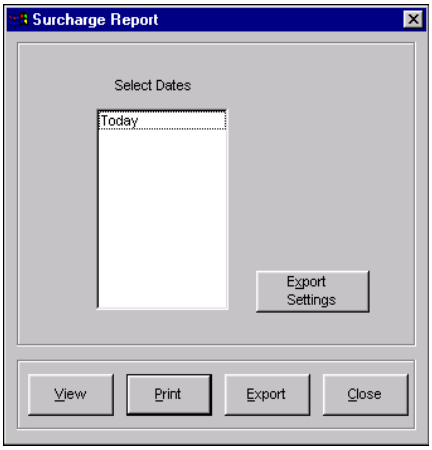


Figure 3-82 Surcharge Report Dialog Box

Select a single date, or a range of dates, from the selection.

The Surcharge report contains the following columns:

Sur# — Indicates the surcharge ID number.

Sur Name — Displays the name of the surcharge.

Count — Indicates the total number of surcharges applied.

Amount — Indicates the total sales from surcharges applied.

Back of House Security Levels Report

The Aloha User Level Security Report prints user IDs, logins, and security levels, including users' abilities to add or edit other users and security levels. The report displays as shown in Figure 3-83:

Figure 3-83 Back of House Security Levels Report Preview

Select Reports > Back-of-House User Security.

The Back of House User Security report contains the following columns:

Number — Indicates the employee's ID number

First Name — Displays the employee's first name.

Last Name — Displays the employee's last name.

Security Level — Indicates the employee's security level.

Start Time — Indicates the time the employee logged into the BOH.

End Time — Indicates the time the employee logged out of the BOH.

Change Users? — Indicates if the employee has the ability to change users.

Change Security? — Indicates if the employee has the ability to change passwords.

Back-of-House Users Report

The Back-of-House User Report prints security level information pertaining to employees accessing the BOH. Select Reports > Back-of-House User Report. The report displays as shown in Figure 3-84:

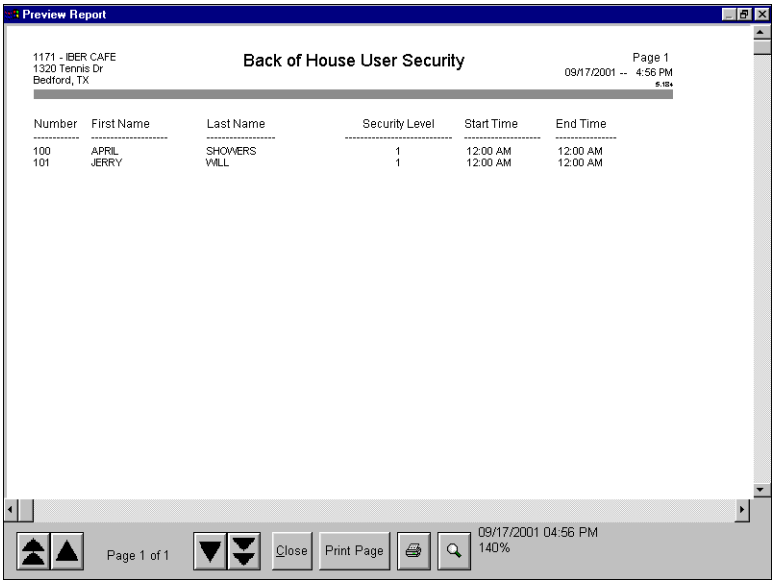


Figure 3-84 Back of House User Security Report Preview

Detailed Access Levels Report

The Detailed Access Levels Report prints access level information and the functions each level may perform, as defined in Maintenance > Labor > Access Levels. This report can be lengthy if there are many access levels. Select Reports > Detailed Access Levels Report. The report displays as shown in Figure 3-85:

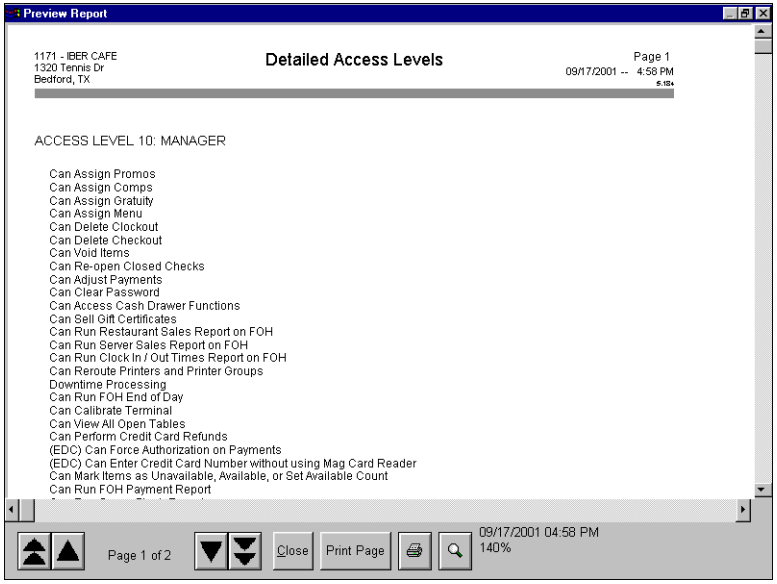


Figure 3-85 Detailed Access Levels Report Preview

System Parameter Summary Report

The System Parameter Summary Report prints database settings, such as store information and guest check printing. Select Reports > System Parameters Summary Report.

Reprints

The Reprints selection in the Reports menu launches the Aloha Reprint program and permits the guest checks or checkout reports for a specific date to be configured or reprinted with font specifications for font type, style, and size. The Reprint program provides two additional menus: File and Reprint.

The File Menu

The File menu in the Reprint program has two choices: Settings and Exit.:

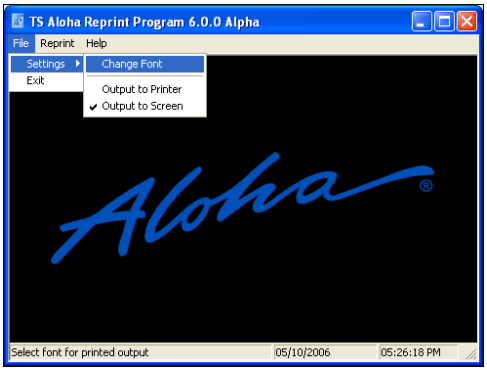


Figure 3-86 Reprint File Menu

Change Font

Select File > Settings > Change Font. The Font dialog box appears.

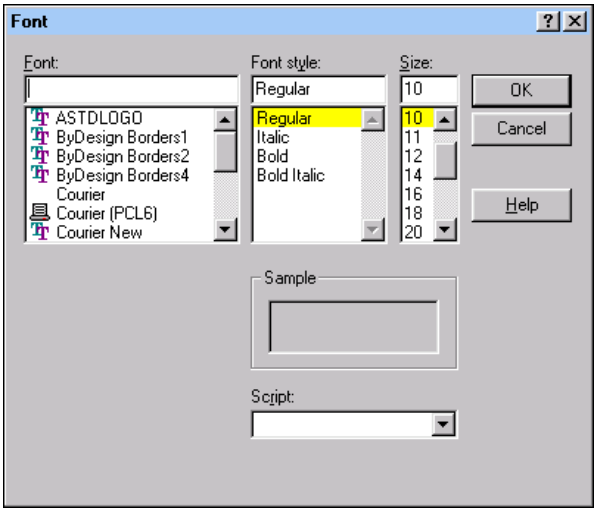


Figure 3-87 Reprint Change Font

The installed fonts are available for selection for the desired reports.

Select the type of font, font style, and size, then click OK to save the font information. These settings apply to all reprints.

Output to Printer

Select File > Settings > Output to Printer to print the reprinted guest check or checkout to an external printer.

Output to Screen

Select File > Settings > Output to Screen to display the reprinted guest check or checkout to the screen.

Exit

Select File > Exit to close the Aloha Reprint program and return to the main screen.

The Reprint Menu

The Reprint menu has four choices used to select the printout to reprint.:

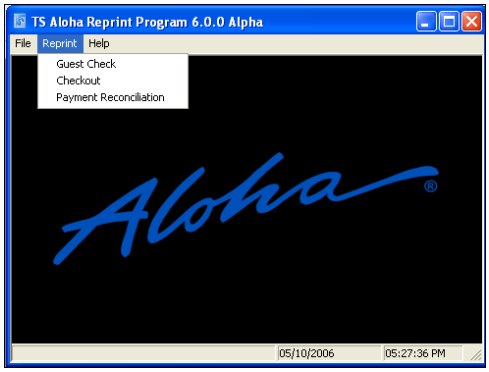


Figure 3-88 Reprint Menu

Guest Check

Select Reprint > Guest Check to reprint a guest check. The Select Date of Reprint dialog box displays with a list of dates including the current date. Select a single date from the list, and click OK. A list of the closed guest checks displays, as shown in Figure 3-89:

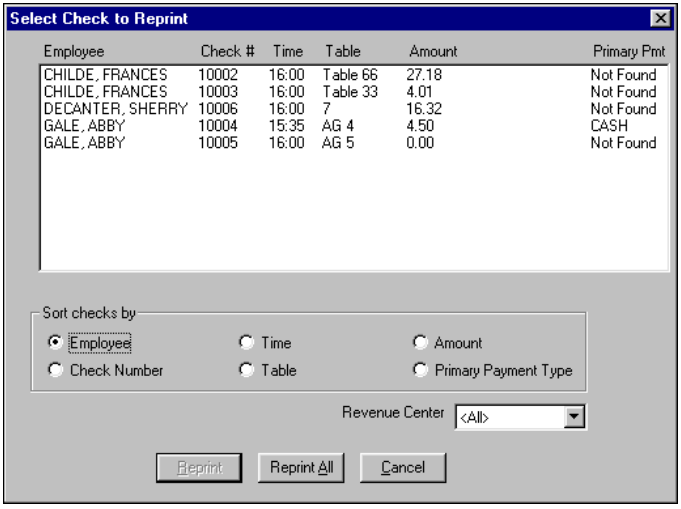


Figure 3-89 Select Check for Reprint Dialog Box

Sort Checks By Group Box

Sorts guest check information to be reprinted either by ‘Employee’, ‘Check Number’, ‘Time’, ‘Table’, ‘Amount’, or ‘Primary Payment Type’.

Revenue Center — Filters the guest check information by a specific revenue center.

Reprint Button

Select the guest check(s) and click Reprint to reprint a single guest check, or multiple guest checks without printing all of them.

The Reprint option is not available unless one or more guest checks are selected.

Reprint All Button

Click Reprints All to reprint all guest checks. The information is sent to the printer or to the screen, depending on the selection in the Reprints File menu.

Cancel Button

Click Cancel to cancel the selection and return to the Reprint program.

Checkout

Select Reprint > Checkout to reprint a checkout for an employee or the drawer checkout report. The Select Date of Reprint dialog box displays with a list of dates including the current date. Select a single date from the list, and click OK. The Select Checkout to Reprint dialog box with a list of the employee checkouts appears.:

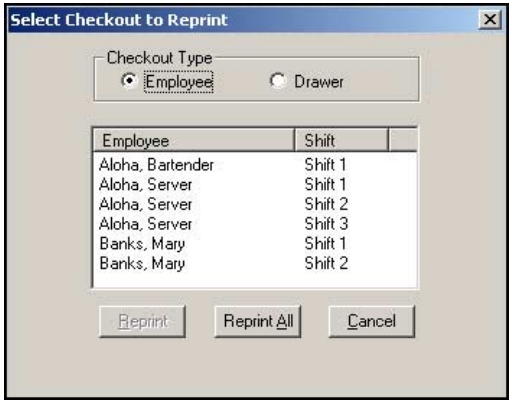


Figure 3-90 Sort by Employee Shift

If you are using the Custom Checkout feature, you must have a Checkout.cfg file in the Data directory or the reprinted checkouts are blank.

Checkout Type Group Box

Employee — Displays a list of the employee checkouts invoked by each employee for each shift. This is the default selection when you display the 'Select Checkout to Reprint' dialog box. Click the Employee or Shift column to sort in ascending and descending order. If you select a checkout

report for an employee who was clocked in under a training mode, the 'Training: Do Not Pay' line displays on the checkout report.

Drawer — Displays the list of drawer checkouts invoked by the 'Checkout' button on the FOH 'Assign Cash Drawer' screen. In the FOH you can run a checkout using the Assign Cash Drawer function, and opt not to reset the drawer to zero. Only drawer checkouts where you opt to reset the drawer to zero display in this list. Click the Cash Drawer or Time column to sort in ascending and descending order.

Reprint Button

Select the checkout(s) and click Reprint to reprint a single checkout, or multiple checkouts without printing all of them.

Reprint All Button

Click Reprint All to reprint all checkouts. The information is sent to the printer or to the screen, depending on the selection in the Reprints File menu.

Cancel Button

Click Cancel to cancel the selection and return to the Reprint program.

Payment Reconciliation

Select Reports > Payment Reconciliation to reprint an employee's Payment Reconciliation information. The Select Date of Reprint dialog box displays with a list of dates including the current date. Select a single date from the list, and click OK. A list of employee shifts required to perform Payment Reconciliation displays. Select an employee and click OK.

Split Checks

Select Reports > Split Checks to reprint a check that has been split. The Select Date of Reprint dialog box displays with a list of dates including the current date. Select a single date from the list, and click OK. A list of employee shifts that have split a check displays. Select a check and click OK.

Transfers Report

The Transfers report provides a listing of all tables transferred between employees in the FOH. It is commonly used as an audit tool for a single date. The report displays as shown in Figure 3-91:

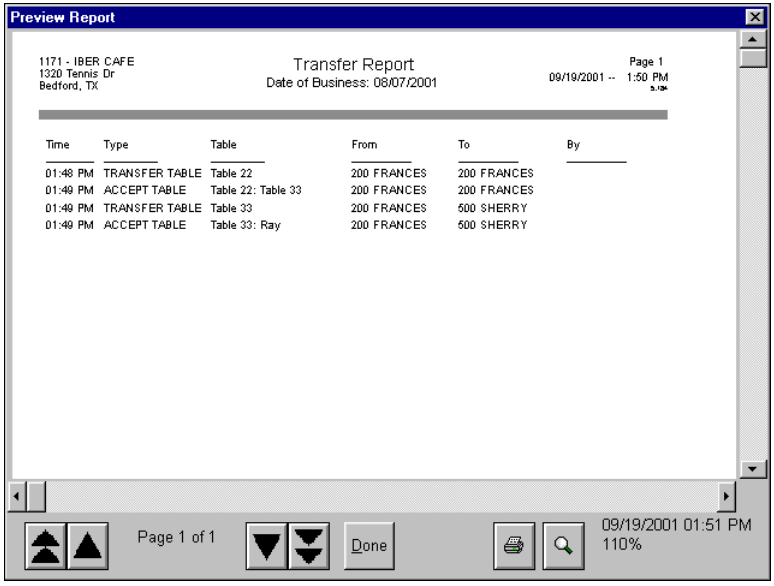


Figure 3-91 Transfers Report Preview

Select Reports > Transfers. The Select Date dialog box appears.:

Figure 3-92 Select Transfer Date

Select a date or the current date and click OK.

Audit Report

The Audit report provides detailed tracking of individual transactions that occur in the FOH, including an audit trail for checks that are empty and have been deleted from the Aloha system because they are empty. These entries display on the report with ‘CLOSE CHECK’ listed under Type and are marked as ‘Fast Close’ in the Transaction column. The report displays as shown in Figure 3-93:

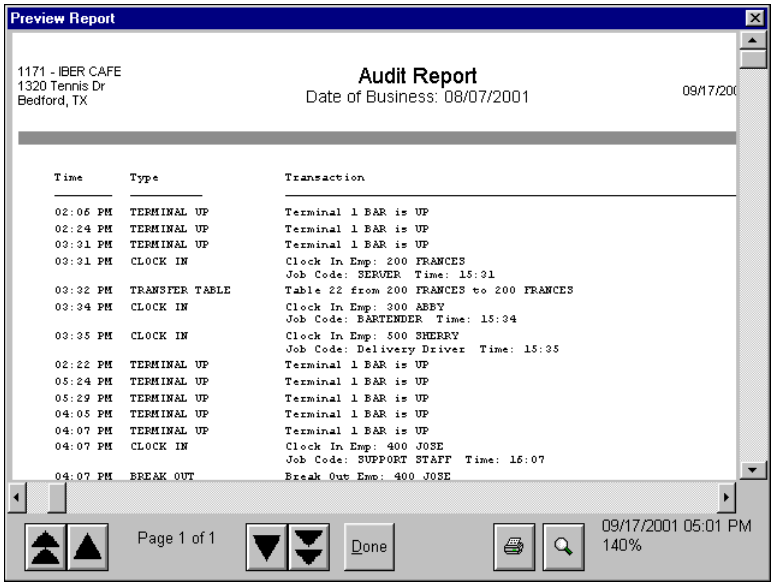


Figure 3-93 Audit Report Preview

Select Reports > Audit. The Select Date drop-down box displays, prompting for a specific date to audit.

Figure 3-94 Select Date Dialog Box

Select a date from the drop-down list, and click OK. The Select Transactions to Audit dialog box opens and permits the selection of the transactions to include in the report.

Select Transactions to Audit

The Select Transactions to Audit dialog box is a report configuration dialog box used to control the manner in which the data is printed on the report.

Narrow the report to a specific time interval by entering a beginning time in the 'From' and 'To' text boxes, using 24-hour clock notation.

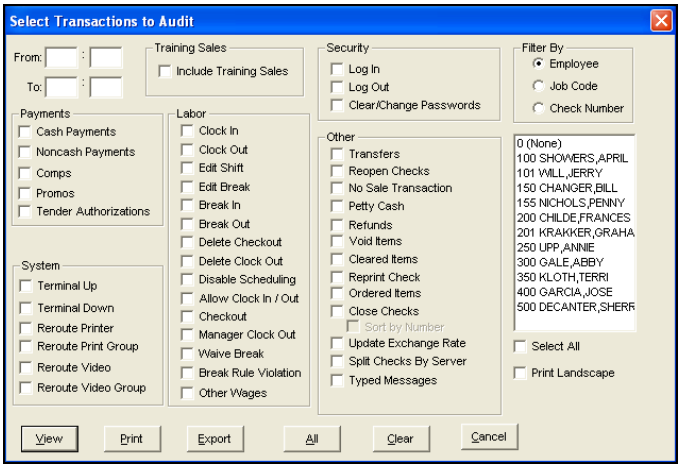


Figure 3-95 Select Transactions for Audit Dialog Box

If a time interval is not entered, the entire 24 hours for the specified date are included on the report. The following check boxes and text boxes provide additional latitude in how the data for the specified field.

Training Sales Group Box

Include Training Sales — Includes sales that are entered while the employee is in 'training' mode on the report.

Payments Group Box

Cash Payments — Prints cash payments.

Noncash Payments — Includes non-cash payments.

Comps — Includes comps.

Promos — Includes promos.

Tender Authorizations — Includes each time a manager approved a tender authorization.

System Group Box

Terminal Up — Includes each the time the terminal is restarted.

Terminal Down — Includes each time the terminal is shut down.

Reroute Printer — Includes each time a printer is rerouted.

Reroute Print Group — Includes each time a printer group is rerouted.

Reroute Video — Includes each time a remote display system is rerouted.

Reroute Video Group — Includes each time a video group is rerouted.

Labor Group Box

Clock In — Includes the employee clock ins.

Clock Out — Includes the employee clock outs.

Edit Shift — Includes each time a shift is edited.

Edit Break — Includes each time a break is edited.

Break In — Includes each time an employee performs a break.

Break Out — Includes each time an employee performs a break out.

Delete Checkout — Includes each time a checkout is deleted.

Delete Clock Out — Includes each time a clock out is deleted.

Disable Scheduling — Includes each time scheduling is disabled from the FOH.

Allow Clock In — Includes each time the manager has to allow an employee to clock in, if the punctuation feature is activated in Maintenance > Store Settings.

Checkout — Includes each time a checkout is performed.

Manager Clock Out — Includes clockouts in which a manager approved when an employee declared less than their tip threshold.

Waive Break — Includes waive break responses from the employee.

Break Rule Violation — Displays break returns that required a manager approval.

Other Wages — Includes each time an other wage transaction was added or edited.

Security Group Box

Log In — Includes log ins.

Log Out — Includes log outs.

Clear/Change Password — Includes each time an employee clears or changes a password.

Other Group Box

Transfers — Includes transfers.

Reopen Checks — Includes checks that were reopened.

No Sale Transactions — Includes no sale transactions.

Petty Cash — Reports transactions related to petty cash accounts.

Refunds — Includes refunds.

Void Items — Includes voided items along with the name of the manager.

Cleared Items — Includes items which were entered and removed with the Clear or Delete button.

Reprint Check — Includes check reprints.

Ordered Items — Includes order items.

Close Checks — Includes closed checks.

Sort by Number — Sorts all closed checks sequentially in the report, including checks used for training sales. ***Related Options:*** 1) You must select 'Close Checks' to enable this option. 2) Selecting 'Sort by Number' automatically selects 'Include Training Sales.'

Update Exchange Rate — Updates the report with the current exchange rate when using foreign currencies.

Split Checks By Server — Includes checks that were split.

Typed Messages — Includes messages entered with the FOH qwerty keypad.

Filter By Group Box

Filters the report either by employee, job code, or check number.

Filter By list box — Enables you to include only the transactions for the corresponding employee, job code, or check number, based on the selection you make from the Filter by group box.

Other Options on the Select Transactions to Audit Dialog Box

Select All — Selects all entries listed in the ‘Filter By list box,’ regardless if it populates employees, job codes, or check number.

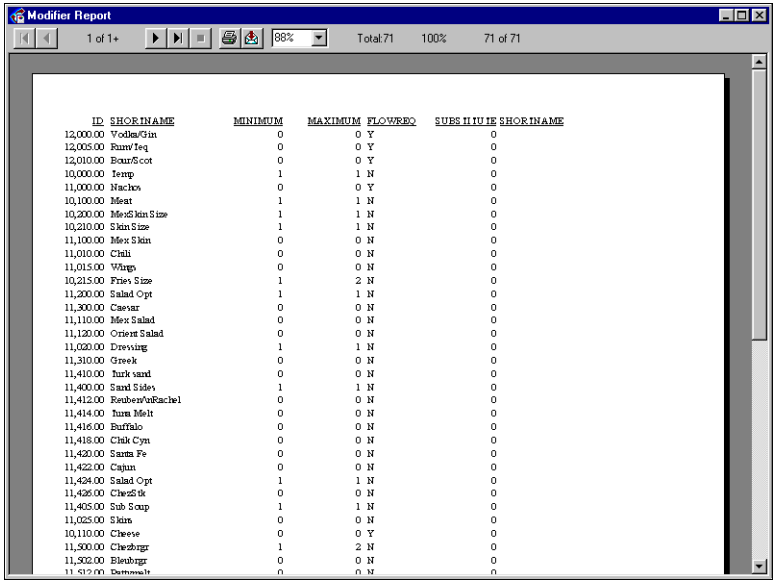
Print Landscape — Prints the report in landscape format.

Make the necessary changes. There are two additional options provided on this dialog box. Click All to automatically include all transactions on the report. To clear all previous settings in the configuration, click Clear.

Crystal Reports

Crystal Report Writer (CRW) is a third-party software product that enables custom reports to be created or modified for use in products like the Aloha system. A run-time version of the product is included as part of the Aloha system. Use the RDB Crystal Reports choice in the Reports menu is used to integrate reports created by Crystal Report Writer.

The run-time version of the program does not provide the ability to design new reports. It merely allows the running of reports built in the CRW format. To create reports using CRW requires a full version of the program. For more information on CRW, consult the Aloha reseller nearest you. The report displays, as shown in Figure 3-96:



ID	SHORTNAME	MINIMUM	MAXIMUM	FLOWREQ	SUBSTITUTE	SHORTNAME
12,000.00	Vodka/Gin	0	0	Y	0	
12,005.00	RumVTeq	0	0	Y	0	
12,010.00	BourScot	0	0	Y	0	
10,000.00	Temp	1	1	N	0	
11,000.00	Nachos	0	0	Y	0	
10,100.00	Meat	1	1	N	0	
10,200.00	MexSkinSize	1	1	N	0	
10,210.00	SkinSize	1	1	N	0	
11,100.00	Mex Skin	0	0	N	0	
11,010.00	Chili	0	0	N	0	
11,015.00	Wings	0	0	N	0	
10,215.00	Fries Size	1	2	N	0	
11,200.00	Salad Opt	1	1	N	0	
11,300.00	Caesar	0	0	N	0	
11,110.00	Mex Salad	0	0	N	0	
11,120.00	Orient Salad	0	0	N	0	
11,020.00	Dressing	1	1	N	0	
11,310.00	Greek	0	0	N	0	
11,410.00	Turk sand	0	0	N	0	
11,400.00	Sand Sides	1	1	N	0	
11,412.00	Reuben/nRachel	0	0	N	0	
11,414.00	Turn Melt	0	0	N	0	
11,416.00	Buffalo	0	0	N	0	
11,418.00	Chik Cyn	0	0	N	0	
11,420.00	Santa Fe	0	0	N	0	
11,422.00	Cajun	0	0	N	0	
11,424.00	Salad Opt	1	1	N	0	
11,426.00	ChezStk	0	0	N	0	
11,405.00	Sub Soup	1	1	N	0	
11,025.00	Skins	0	0	N	0	
10,110.00	Cheese	0	0	Y	0	
11,500.00	Chezbrgr	1	2	N	0	
11,502.00	Bleubrgr	0	0	N	0	
11,512.00	Pattymelt	0	0	N	0	

Figure 3-96 Crystal Report (Modifiers) Preview

Select **Reports > Crystal Reports** to open the Configure Crystal Reports function tab.:

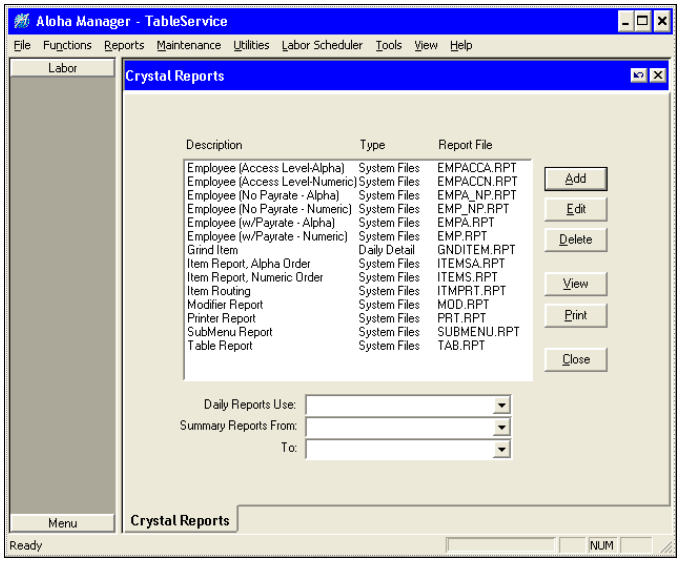


Figure 3-97 Crystal Reports Function Tab

Add or Edit Button

Click Add to open the Add Crystal Report dialog box, select the report from the selection list, and click Edit.

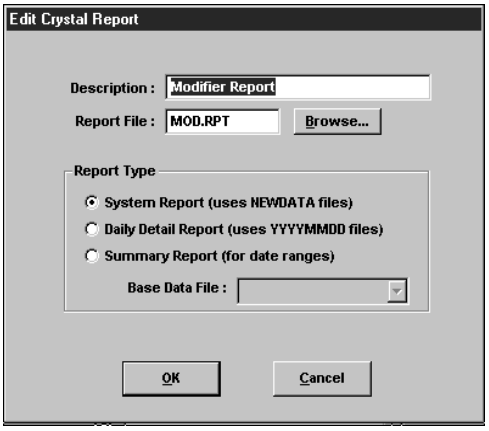


Figure 3-98 Edit Crystal Report Dialog Box

Description — Contains a long description used to identify the type and nature of the report.

Report File — Holds the name of the CRW report file. CRW reports always have the RPT file name extension. Browse allows a search of available RPT files to be performed.

Report Type Group Box

System Report — Defines the report using files in the \NEWDATA subdirectory.

Daily Detail Report — Defines the report to use files in the dated daily subdirectories.

Summary Report — Defines the report as a summary report for date ranges. When selected, this check box activates the Base Data file drop-down list.

Base Data File — Used to enter the name of the primary database file used by the new report. There are seven built in choices: Items, Payments, Revenue Centers, Sales, Table Turns, Time And Attendance, and Voids.

Click OK to add the new report to the Aloha system.

Index

T