
Feature Focus Guide:

Aloha Takeout Tax by Destination

Last Updated: June 8, 2021

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Revision Record

Date	Description of Change
June 7, 2021	Converted document to use new templates.

Supported Versions	Description

About Aloha Takeout Tax by Destination

Aloha Takeout Tax by Destination at a Glance	
Core Product	Aloha Quick Service, Aloha Table Service
Complementary Products	Aloha Takeout
Separate License Required?	An 'Aloha Takeout and Delivery' license is required. Note: An 'Aloha Takeout and Delivery Mapping' license is not required for Delivery area functionality.
Other References	Aloha Quick Service Reference Guide, Aloha Table Service Reference Guide, Aloha Takeout Reference Guide.

Tax regulations may require you to assess taxes based on the location to which you deliver or cater an order rather than the location of your restaurant, referred to as 'tax by destination.' Aloha Takeout v13.1 enables you to easily comply with tax by destination using tax functionality available in the Aloha POS system, and options available in Aloha Takeout. The Tax by Destination feature keys off of the ZIP code to which you deliver or cater an order. If the ZIP code is one for which tax by destination rules apply, the system calculates the tax using the tax rate you establish for that ZIP code.

If you are a site already using Aloha Takeout, not a new installation, do not alter your existing tax types or flex tax rules, as you use these for calculating taxes based on the location of your store. You do, however, need to build on your existing tax structure and create new tax types and flex tax rules specifically for supporting the Tax by Destination feature.

SCENARIO: Your restaurant resides in ZIP code 76155 and delivers to two additional ZIP codes, 76021 and 76039, which are subject to different tax rates than ZIP code 76155. Additionally, delivered bottled water is not subject to tax. It is necessary for you to configure and use the Tax by Destination feature.

For the purpose of demonstrating the Tax by Destination feature, the procedures included in this document assume this is a new Aloha Takeout installation and depict how to configure Tax by Destination to meet the requirements for this scenario.

Note: To support the Tax by Destination feature, you must be on Aloha POS vs 13.1 or later.

Configuring Aloha Takeout Tax by Destination

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Tax by Destination. If you are an experienced user, refer to

Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	<p>Configure the Aloha POS for Tax by Destination.</p> <p>Access Maintenance > Taxes to configure taxes for tax by destination. See page 3.</p> <p>Select Tax Locale to create tax locales for each ZIP code in your delivery area.</p> <p>Select Tax Type to create a tax type for each jurisdiction for which you must support tax regulations. If you have not created a tax type for your store location, it is necessary to do so.</p> <p>Select Flex Tax Rules to create as many flex tax rules as needed to support your store location and each delivery area that is subject to tax by destination. The system requires you to create two methods of flex tax rules to support the Tax by Destination feature: 'Always' and 'Tax locale.' Create a chain of 'Tax locale' flex tax rules.</p> <p>Select Tax Group to edit or create tax groups. Associate the necessary tax groups with the first 'Tax locale' flex tax rule in the 'Tax locale' flex tax chain. As needed, create additional tax groups, for items such as delivered bottled beverages.</p> <p>Optionally, access Maintenance > Menu > Items to assign items to tax groups, if you have not previously done so. See page 15.</p> <p>Select Maintenance > Labor > POS Access Levels to provide designated employees with the ability to override a tax calculated by destination. See page 15.</p>
2.	<p>Configure Aloha Takeout for Tax by Destination. See page 16.</p> <p>Access Maintenance > Takeout Configuration > Takeout Settings > Order Modes to enable the Tax by Destination feature for each order mode for which you may need to assess a tax by destination. (For example, delivery and catering.)</p> <p>Access Maintenance > Taxes > Tax by Destination to associate a ZIP code in ATO with a tax locale in the Aloha POS.</p>
3.	<p>Select Utilities > Refresh POS & All Products to refresh the data. See page 17.</p>

Configuring Tax by Destination in the Aloha POS

There are a number of configuration requirements within the Aloha POS to support the Tax by Destination feature. Do not alter existing tax types or flex tax rules, but rather create new ones to use specifically, and only, for supporting Tax by Destination.

Creating Tax Locales

Create a tax locale for each ZIP code in your delivery area, including your store location. Referring back to the scenario, it is necessary to create three separate tax locales, one for your store location of 76155, and one each for the two ZIP codes to which you deliver, 76021 and 76039.

1. Select **Maintenance > Taxes > Tax Locale**.
2. Click **New** to add a tax locale.

Figure 1 Tax Locale

3. Accept the system assigned **number** or click the **ellipsis (...)** button to choose your own number.
4. Type a **name** for the tax locale. We recommend using the ZIP code for the name.
5. Type a **description** for the tax locale, such as precise street boundaries.
6. Click **Save**.
7. Repeat this procedure for **each ZIP code**. In addition to creating a tax locale for your store location, create a tax locale for each ZIP code to which you deliver.
8. Exit the **tax locale** function.

Creating Tax Types

Create a tax type for each jurisdiction for which you must support tax regulations. Enter the tax percentage as a total of all state and local sales taxes.

Referring back to the scenario, it is necessary to create a tax type for ZIP code 76155, which is the store location, one tax type each for the ZIP codes to which you deliver, 76021 and 76039, and a tax type for delivered bottled beverages, which are subject to a tax rate of '0.00.'

To create a tax type to support your store location:

Note: If you are an existing ATO installation, a tax type for your store location already exists and you do not need to create another one. Skip this procedure and move to the next one to create tax types for each jurisdiction for which you must support tax regulations.

1. Select **Maintenance > Taxes > Tax Type**.



Figure 2 Tax Type Store Location

2. Click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.
3. Accept the system assigned **number** or click the **ellipsis (...)** button to choose your own number.
4. Name the **tax type** using the ZIP code for your store location, for ease in identification.
5. Type a **description** to help identify this tax type as one for your store location, such as 'Store Location.'
6. Select **Exclusive Rate** from the 'Method' drop-down list.
7. Enter the **percentage** as a total of all state and local sales taxes.
8. Click **Save**.

To create a tax type for each delivery area subject to tax by destination:

1. While still in the **Tax Type** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

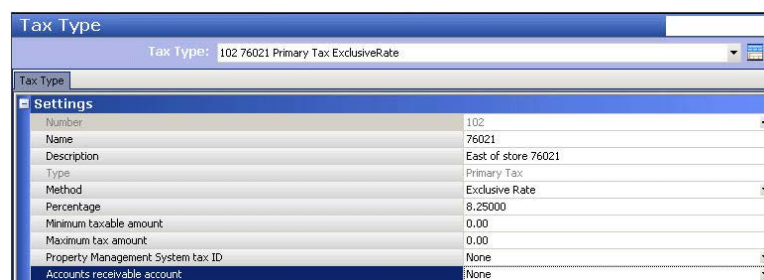


Figure 3 Tax Type Additional Zip Codes

2. Accept the system assigned **number** or click the **ellipsis (...)** button to choose your own number.
3. Name the **tax type** using the ZIP code for the corresponding delivery area, for ease in identification.

4. Type a **description** to help identify this tax type as one for this tax locale, such as a geographical location followed by the ZIP code or a major street followed by the ZIP code.
5. Select **Exclusive Rate** from the 'Method' drop-down list.
6. Enter the **percentage** as a total of all state and local sales taxes.
7. Click **Save**.

To create as many tax types as needed to support additional tax rules, such as zero tax on delivered bottled beverages:

1. While still in the **Tax Type** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

The screenshot shows a 'Tax Type' configuration window. At the top, the 'Tax Type' dropdown is set to '105 BottledDel Primary Tax ExclusiveRate'. Below this, a 'Settings' section is expanded, showing the following fields:

Number	105
Name	BottledDel
Description	Bottled Beverage Delivery
Type	Primary Tax
Method	Exclusive Rate
Percentage	0.00000
Minimum taxable amount	0.00
Maximum tax amount	0.00
Property Management System tax ID	None
Accounts receivable account	None

Figure 4 Tax Type Delivered Bottled Beverages

2. Accept the system assigned **number** or click the **ellipsis (...)** button to choose your own number.
3. Name the **tax type** using a name for ease in identification, such as 'BottledDel' for delivered bottled beverages.
4. Type a **description** to help identify this tax type as one for this additional tax rule, such as 'Bottled Beverage Delivery.'
5. Select **Exclusive Rate** from the 'Method' drop-down list.
6. Enter the **percentage** as a total of all state and local sales taxes.
7. Click **Save** and exit the **Tax Type** function.

Creating Flex Tax Rules

Create as many flex tax rules as needed to support your store location and each delivery area that is subject to tax by destination. The system requires you to create two methods of flex tax rules to support the Tax by Destination feature: 'Always' and 'Tax locale.'

Note: If you are an existing ATO installation, an 'Always' flex tax rule for your store location may already exist and you do not need to create another one. However, you still need to create all other flex tax rules required to support the Tax by Destination feature.

It is necessary to:

1. Create an 'Always' flex tax rule for:

The store location

-AND-

Each tax locale that is subject to tax by destination,

-AND-

Each additional tax rule you need to support, such as delivered bottled beverages.

Associate the 'Always' flex tax rule with the corresponding tax type you created for it in the Tax Type function. For example, when creating an 'Always' flex tax rule for your store location, associate that rule with the tax type you created for your store location (ZIP code 76155 in the scenario).

2. Create a 'Tax locale' flex tax rule set for:

Each tax locale to which you are subject to tax by destination,

-AND-

Each additional tax rule you need to support.

You establish a link from one 'Tax locale' flex tax rule to another until you reach the end of the chain, which you then link back to the 'Always' flex tax rule for the store location. For each 'Tax locale' flex tax rule, it is necessary to make selections for:

Apply tax if tax locale is - Select a tax locale for a ZIP code subject to tax by destination.

Chain to if successful - Select the 'Always' flex tax rule that corresponds to the tax locale or additional tax rule for which you are currently creating a 'Tax locale' flex tax rule.

Chain to if fails - Select the next 'Tax locale' flex tax rule in the chain. The exception is when you create the last 'Tax locale' flex tax rule in the chain, which must link back to the 'Always' flex tax rule for the store location.

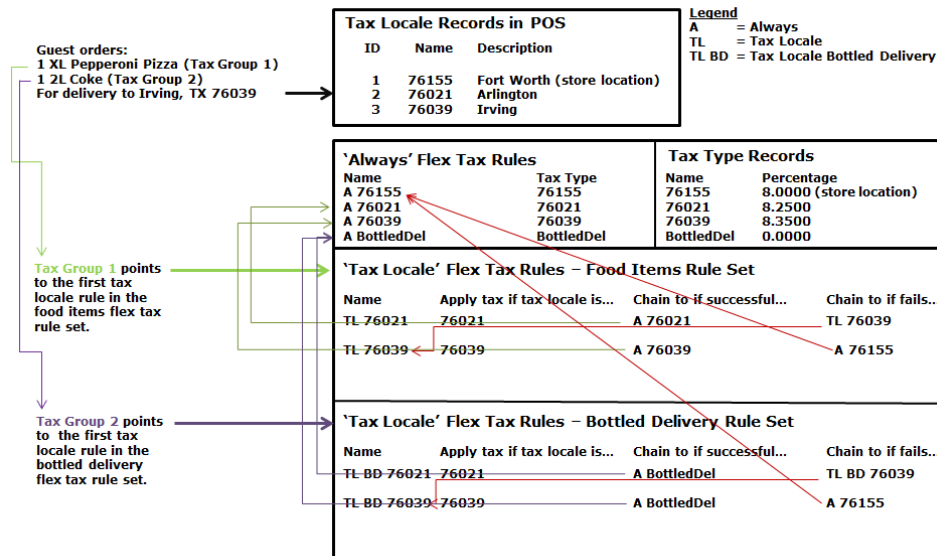


Figure 5 Flex Tax Rule Set Flow

Later in this configuration, you will specify for which order modes you want to enable tax by destination. For example, you want to enable tax by destination for the order mode you use for delivery orders, but not for the order mode you use when the guest picks up their order at your store. When you apply an order mode for which you enable tax by destination, ATO reads the ZIP code in the delivery address, compares it to the postal codes in ATO to determine the tax locale in the POS. The system does the following:

1. Reads the first item in the order and uses the tax group assignment to determine the first 'Tax locale' flex tax rule in the chain.
2. If the tax locale matches the selection in 'Apply tax if tax locale is,' the system processes the 'Chain to if successful' link, which chains to an 'Always' flex tax rule associated with a tax type. It then drops out of the chain and calculates taxes using the rate associated with the tax type.
 If the tax locale does not match the selection in 'Apply tax if tax locale is,' the system processes the 'Chain to if fails' link. The 'Chain to if fails' link chains to the next 'Tax locale' flex tax rule in the chain.
3. The system repeats step 2 until it either meets a successful condition or gets to the last 'Tax locale' flex tax rule in the chain, whichever comes first. If the tax locale fails to meet the successful condition for the last 'Tax locale' flex tax rule, the fail condition in this rule links back to the 'Always' flex tax rule for the store location and the system calculates the taxes accordingly.

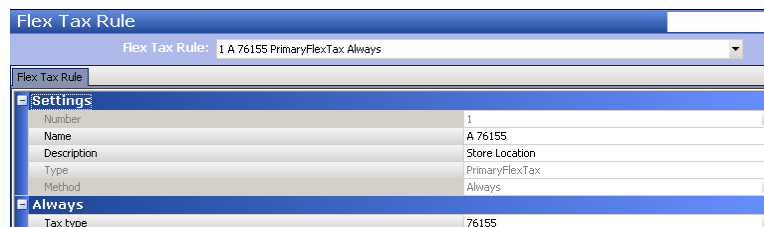
Create Flex Tax Rules of the 'Always' Method Needed to Support Tax by Destination

In the scenario, it is necessary to create four 'Always' flex tax rules, one for the store location of 76155, one each for the ZIP codes to which the store delivers, 76021 and 76039, and a fourth for delivered bottled beverages.

To create an 'Always' flex tax rule for your store location:

Note: If you have previously created an 'Always' flex tax rule for your store location, skip this procedure and move to the next one to create 'Always' flex tax rules for each jurisdiction for which you must support tax regulations.

1. Select **Maintenance > Taxes > Flex Tax Rule**.



The screenshot shows the 'Flex Tax Rule' configuration window. At the top, there is a search bar with the text 'Flex Tax Rule: 1 A 76155 PrimaryFlexTax Always'. Below this is a table with two sections: 'Settings' and 'Always'. The 'Settings' section includes fields for 'Number' (1), 'Name' (A 76155), 'Description' (Store Location), 'Type' (PrimaryFlexTax), and 'Method' (Always). The 'Always' section includes a 'Tax type' field set to 76155.

Settings	
Number	1
Name	A 76155
Description	Store Location
Type	PrimaryFlexTax
Method	Always

Always	
Tax type	76155

Figure 6 Primary Flex Tax Rule Store Location Always

2. Click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.
3. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
4. Type a **name** for the flex tax rule. We suggest using 'A' for 'Always' followed by the ZIP code. In the scenario, the name is 'A 76155.'
5. Type a **description** to help identify this flex tax rule, such as 'Local Store.'
6. Select **Always** from the 'Method' drop-down list.
7. Select the **tax type** you created for the store location from the 'Tax type' drop-down list.
8. Click **Save**.

To create an 'Always' flex tax rule for each delivery area for which you are subject to tax by destination:

1. While still in the **Flex Tax Rule** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

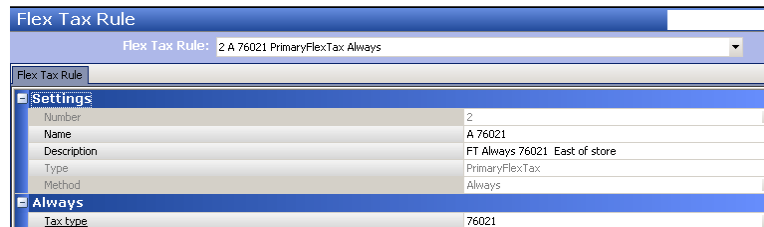


Figure 7 Primary Flex Tax Rule Additional ZIP Codes Always

2. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
3. Type a **name** for the flex tax rule. We suggest using 'A' for 'Always' followed by the ZIP code. In the scenario, the name is 'A 76021.'
4. Type a **description** to help identify this flex tax rule, such as a geographical location followed by the ZIP code or a major street followed by the ZIP code.
5. Select **Always** from the 'Method' drop-down list.
6. Select the **corresponding tax type** you created for this delivery area.
7. Click **Save**.

To create an 'Always' flex tax rule for each additional tax rule you need to support:

1. While still in the **Flex Tax Rule** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

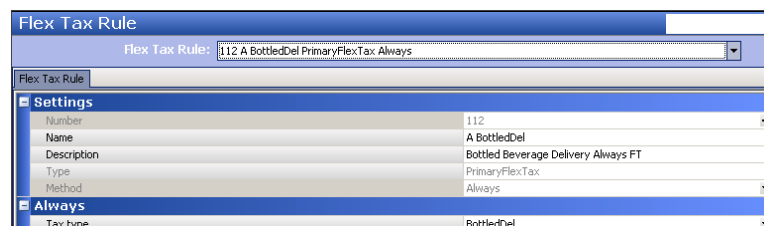


Figure 8 Flex Tax Rule Bottled Beverage Delivery Always

2. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
3. Type a **name** for the flex tax rule. We suggest using 'A' for 'Always' followed by an identifier for the rule. In the scenario, the name is 'A BottledDel.'
4. Type a **description** to help identify this flex tax rule.

5. Select **Always** from the 'Method' drop-down list.
6. Select the **corresponding tax type** you created for this tax rule.
7. Click **Save**.

Create Flex Tax Rules of the 'Tax locale' Method Needed to Support Each Tax Locale Subject to Tax by Destination

The 'Tax locale' flex tax rules are where you create your chain of flex tax rules. First, create a 'Tax locale' flex tax rule in which the 'Chain to if fails' is the 'Always' flex tax rule of your store location. Second, create the other 'Tax locale' flex tax rules. In the scenario, it is necessary to create two 'tax locale' flex tax rules for food items.

To create the 'Tax locale' flex tax rule wherein the 'Chain to if fails' is the 'Always' flex tax rule for the store location:

1. While still in the **Flex Tax Rule** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

The screenshot shows the 'Flex Tax Rule' configuration window. The 'Flex Tax Rule' dropdown is set to '103 TL 76039 PrimaryFlexTax.TaxLocale'. The 'Settings' section includes: Number (103), Name (TL 76039), Description (FT Locale 76039), Type (PrimaryFlexTax), and Method (Tax locale). The 'Tax locale' section has 'Apply tax if tax locale is' set to 76039. The 'Chaining' section has 'Chain to if successful' set to A 76039 and 'Chain to if fails' set to A 76155.

Section	Field	Value
Settings	Number	103
	Name	TL 76039
	Description	FT Locale 76039
	Type	PrimaryFlexTax
	Method	Tax locale
Tax locale	Apply tax if tax locale is	76039
Chaining	Chain to if successful	A 76039
	Chain to if fails	A 76155

Figure 9 'Tax Locale' Flex Tax Rule with Store Fails To

2. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
3. Type a **name** for the flex tax rule. We suggest using 'TL' for 'Tax locale' followed by the ZIP code. In the scenario, the name is 'TL 76039.'
4. Type a **description** to help identify this flex tax rule.
5. Select **Tax locale** from the 'Method' drop-down list.
6. Select a **tax locale** from the 'Apply to if tax locale is' drop-down list. In the scenario, the tax locale is '76039.'
7. Select the **'Always' flex tax rule** that corresponds to the tax locale selected in 'Apply to if tax locale is' in the 'Chain to if successful' drop-down list. In the scenario, this is 'A 76039.'
8. Select the **'Always' flex tax rule** for your store location in the 'Chain to if fails' drop-down list. In the scenario, this is 'A 76155.'
9. Click **Save**.

To create a 'Tax locale' flex tax rule for each tax locale (delivery area) for which you are subject to tax by destination:

1. While still in the **Flex Tax Rule** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

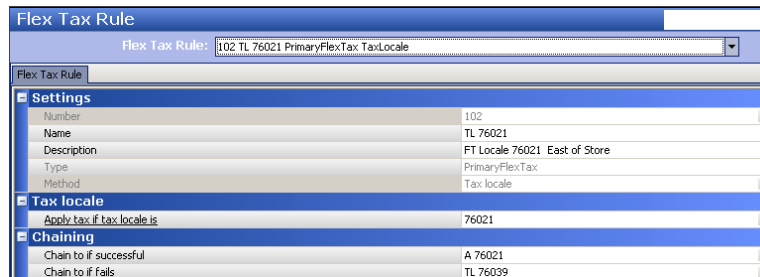


Figure 10 Flex Tax Rules

2. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
3. Type a **name** for the flex tax rule. We suggest using 'TL' for 'Tax locale' followed by the ZIP code. In the scenario, the name is 'TL 76021.'
4. Type a **description** to help identify this flex tax rule.
5. Select **Tax locale** from the 'Method' drop-down list.
6. Select a **tax locale** from the 'Apply to if tax locale is' drop-down list. In the scenario, the tax locale is '76021.'
7. Select the **'Always' flex tax rule** that corresponds to the selected tax locale in 'Apply to if tax locale is' in the 'Chain to if successful' drop-down list. In the scenario, this is 'A 76021.'
8. Select a **'tax locale' flex tax rule** from the 'Chain to if fails' drop-down list. In the scenario, this is 'TL 76039.'
9. Click **Save**.

Create Flex Tax Rules of the 'Tax locale' Method Needed to Support Additional Tax Rules for Tax by Destination

It may be necessary to create 'Tax locale' flex tax rules to support additional tax rules, such as zero tax on delivered bottled beverages. First, create a 'Tax locale' flex tax rule in which the 'Chain to if fails' is the 'Always' flex tax rule of your store location. Second, create the other 'Tax locale' flex tax rules. In the scenario, it is necessary to create two 'Tax locale' flex tax rules to support zero tax on bottled beverages.

To create a 'Tax locale' flex tax rule for each additional tax rule you need to support wherein the 'Chain to if fails' is the 'Always' flex tax rule for the store location:

1. While still in the **Flex Tax Rule** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.

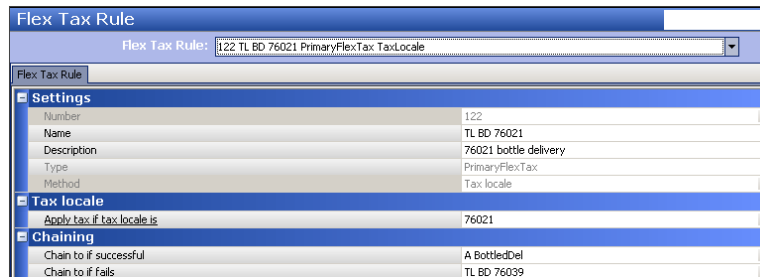
Flex Tax Rule	
Flex Tax Rule:	123 TL BD 76039 PrimaryFlexTax TaxLocale
Flex Tax Rule	
Settings	
Number	123
Name	TL BD 76039
Description	76039 bottle delivery
Type	PrimaryFlexTax
Method	Tax locale
Tax locale	
Apply tax if tax locale is	76039
Chaining	
Chain to if successful	A BottledDel
Chain to if fails	A 76155

Figure 11 'Tax Locale' Flex Tax Rule For Bottled Delivery

2. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
3. Type a **name** for the flex tax rule. In the scenario, the name is 'TL BD 76039,' to identify the rule as 'Tax locale Bottled Delivery 76039.'
4. Type a **description** to help identify this flex tax rule, for ease in identification.
5. Select **Tax locale** from the 'Method' drop-down list.
6. Select a **tax locale** from the 'Apply to if tax locale is' drop-down list. In the scenario, tax locale is '76039.'
7. Select the **'Always' flex tax rule** that corresponds to additional tax rule in the 'Chain to if successful' drop-down list. In the scenario, this is 'A BottledDel.'
8. Select the **'Always' flex tax rule** for your store location from the 'Chain to if fails' drop-down list. In the scenario, this is 'A 76155.'
9. Click **Save**.

To create a 'tax locale' flex tax rule for each additional rule for each locale for which you are subject to tax by destination:

1. While still in the **Flex Tax Rule** function, click the **New** drop-down arrow, select **Primary** as the tax type, and click **OK**.



Flex Tax Rule	
Flex Tax Rule:	122 TL BD 76021 PrimaryFlexTax.TaxLocale
Settings	
Number	122
Name	TL BD 76021
Description	76021 bottle delivery
Type	PrimaryFlexTax
Method	Tax locale
Tax locale	
Apply tax if tax locale is	76021
Chaining	
Chain to if successful	A BottledDel
Chain to if fails	TL BD 76039

Figure 12 'Tax Locale' Flex Tax Rule for Bottled Delivery

2. Accept the system assigned **number** or click the **Ellipsis (...)** button to choose your own number.
3. Type a **name** for the flex tax rule. In the scenario, the name is 'TL BD 76021,' to identify the rule as 'Tax locale Bottled Delivery 76021.'
4. Type a **description** to help identify this flex tax rule, for ease in identification.
5. Select **Tax locale** from the 'Method' drop-down list.
6. Select a **tax locale** from the 'Apply to if tax locale is' drop-down list. In the scenario, this is '76021.'
7. Select the **'Always' flex tax rule** that corresponds to additional tax rule in the 'Chain to if successful' drop-down list. In the scenario, this is 'A BottledDel.'
8. Select a **'tax locale' flex tax rule** from the 'Chain to if fails' drop-down list. In the scenario, this is 'TL BD 76039.'
9. Click **Save**.

Creating or Editing Tax Groups

The Aloha POS applies tax rates to menu items, rather than by order mode, making it necessary to edit tax groups and associate the tax groups with the first 'Tax locale' flex tax rule in the 'Tax locale' flex tax rule chain. You only need to edit those tax groups associated with items for delivery or catering orders.

To edit a tax group:

1. Select **Maintenance > Taxes > Tax Group**.
2. Select a **tax group** from the 'Tax Group' drop-down list.

The screenshot shows the 'Tax Group' configuration window. At the top, there is a 'Tax Group' dropdown menu set to '1 Tax Group 1'. Below this, there are two main sections: 'Identification' and 'Taxes'. The 'Identification' section contains fields for 'Number' (value: 1) and 'Name' (value: Tax Group 1). The 'Taxes' section contains several rows, each with a dropdown menu. The 'Primary tax' dropdown is set to 'FOOD', while 'Secondary tax', 'Secondary flex tax', 'Vendor tax', and 'Surcharge' are all set to 'None'.

Figure 13 Tax Group with Primary Tax

The screenshot shows the 'Tax Group' configuration window. At the top, there is a 'Tax Group' dropdown menu set to '1 Tax Group 1'. Below this, there are two main sections: 'Identification' and 'Taxes'. The 'Identification' section contains fields for 'Number' (value: 1) and 'Name' (value: Tax Group 1). The 'Taxes' section contains several rows, each with a dropdown menu. The 'Primary flex tax' dropdown is set to 'TL 76021', while 'Secondary tax', 'Secondary flex tax', 'Vendor tax', and 'Surcharge' are all set to 'None'.

Figure 14 Tax Group with Primary Flex Tax

3. Under the 'Taxes' group bar, select **None** from the 'Primary tax' drop-down list. When you select None, the 'Primary flex tax' drop-down list appears.
4. Select the a **'Tax locale' Primary flex tax rule**. The rule you select should be the first 'Tax locale' flex tax rule in the flex tax rule set. In the scenario, the first 'tax locale' flex tax rule is 'TL 76021.'
5. Click **Save**.
6. Repeat for **each tax group** as necessary.

Note: When you edit the tax group for an item with an additional tax rule, such as delivered bottle beverages, you must use the first tax locale flex tax rule you created for delivered bottle beverages.

To create a tax group:

1. Select **Maintenance > Taxes > Tax Group**.
2. Click the **New** drop-down arrow.
3. Use the next unassigned **number** or use the **ellipsis (...)** button to choose your own number.
4. Under the 'Identification' group bar, type a **name** for the tax group.

5. Under the 'Taxes' group bar, select a **flex tax rule** from the 'Primary flex' tax drop-down list.
6. Click **Save** and exit the **Tax Group** function.

Assigning Items

If you have not assigned Tax Groups to items, assign them at this time. Otherwise, proceed to the next section.

1. Select **Maintenance > Menu > Items**.
2. Select an **item** from the Item drop-down list.

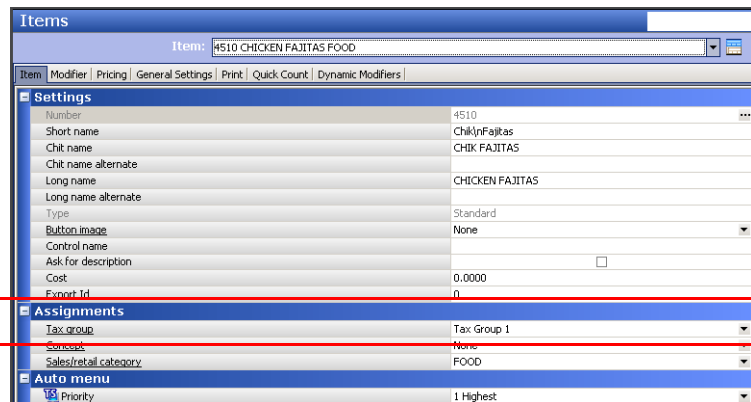


Figure 15 Tax Group Items

3. Select the **Item** tab.
4. Under the 'Assignments' group bar, select the **tax group** to associate with this item from the 'Tax group' drop-down list.
5. Click **Save**.
6. Repeat for **each item** not already associated with a tax group.
7. Exit the **Items** function.

Providing the Ability to Override Tax by Destination

Aloha Takeout allows you to provide an employee, such as a manager, with the access to override a tax calculated by destination. Aloha Takeout calculates tax by destination according to ZIP code. In some situations, it is possible to have one ZIP code encompass two different tax jurisdictions. In those instances, you may need to override the tax rate for the ZIP code and apply the tax rate of a different ZIP code.

1. Select **Maintenance > Labor > POS Access Levels**.
2. Select an **access level** from the 'POS Access Level' drop-down list.
3. Under the 'Aloha Takeout' group bar, select **Can override tax locale**.
4. Click **Save**.

5. Repeat for **each access level** that can override tax by destination.
6. Exit the **POS Access Levels** function.

Configuring Tax by Destination in Aloha Takeout

Once you complete the configuration steps within the Aloha POS, you then configure tax by destination in Aloha Takeout. First, you enable tax by destination for each order mode for which tax by destination applies and then you define the tax locales for Aloha Takeout.

Enabling Tax by Destination by Order Mode

You enable tax by destination in Aloha Takeout by order mode. In most cases, you only need to enable this feature for delivery and catering order modes.

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Order Modes**.
2. Under the 'Order Modes' group bar, select an **order mode** for which you apply orders subject to tax by destination.

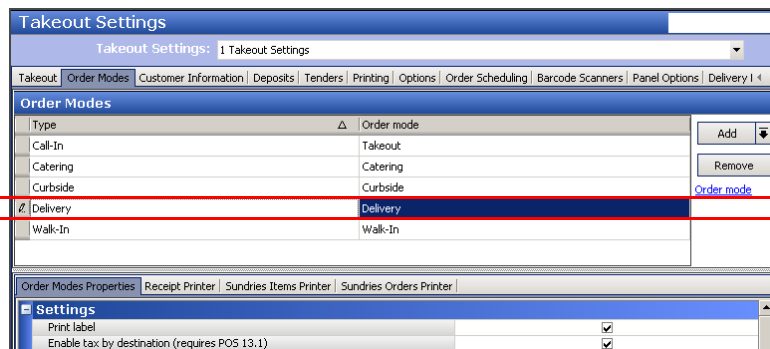


Figure 16 Enable Tax By Destination

3. In the Order Modes Properties tab, under the 'Settings' group bar, select **Enable tax by destination** for the selected order mode.
4. Repeat for **each order mode** for which you want to enable tax by destination.
5. Click **Save** and exit the **Takeout Settings** function.

Associating ZIP codes in Your Delivery Area to POS Tax Locale

Remember, in [Creating Tax Locales](#), you created a tax locale for each ZIP code within your delivery area. In this section, you associate the ZIP codes in your delivery area that are subject to tax by destination to a corresponding POS tax locale.

1. Select **Maintenance > Taxes > Tax by Destination**.

Postal code	Δ	Tax locale	
76021		76021	Add
76039		76039	Remove
76155		76155	Tax locale

Figure 17 Tax by Destination

2. Click **New** to create a new record with an ID of '1.'
3. Under the 'Postal Codes' group bar, click **Add** to add a blank row.
4. In the 'Postal code' column, type a **ZIP code** in your delivery area that is subject to tax by destination.
5. Select the corresponding **POS tax locale** to associate with the entered ZIP code from the 'Tax locale' drop down list.
6. Repeat **this procedure** for each ZIP code in your delivery area that is subject to tax by destination.
7. Click **Save** and exit the **Tax by Destination** function.

Refreshing the Data

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

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

Using ATO Tax by Destination

Aloha Takeout applies tax by destination when you apply a check to an order mode for which you enable tax by destination and the delivery area is one for which you are subject to tax by destination. If a tax locale applies to the order, the system displays 'Tax Locale: ZIP code' to the check detail on the Order Confirmation screen. The system also displays the same message on the bottom left side of the Check Details screen. No additional steps are required in the ordering process, unless you want to override the tax locale the system applied to the order.

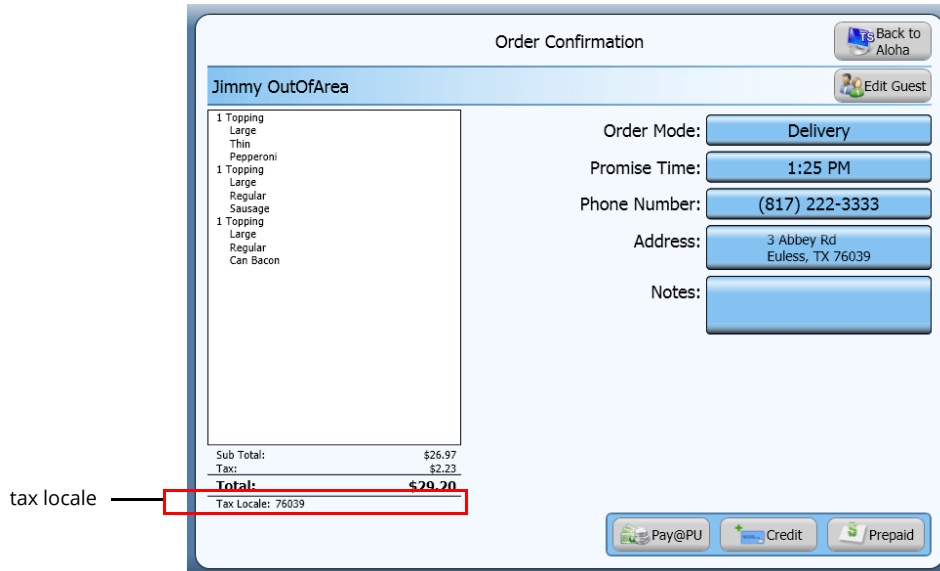


Figure 18 Order Confirmation Screen Tax by Destination

Overriding Tax by Destination

Aloha Takeout uses ZIP codes to determine the tax rate to assess. In some instances, a ZIP code may include two separate tax jurisdictions. Aloha Takeout enables you to override the tax locale associated with the zip code and assess the tax rate of a different tax locale, which would normally be the tax locale for your operation.

1. At the Order Confirmation screen, touch **Edit Guest** on the top right side of the screen. The Customer Details screen appears.

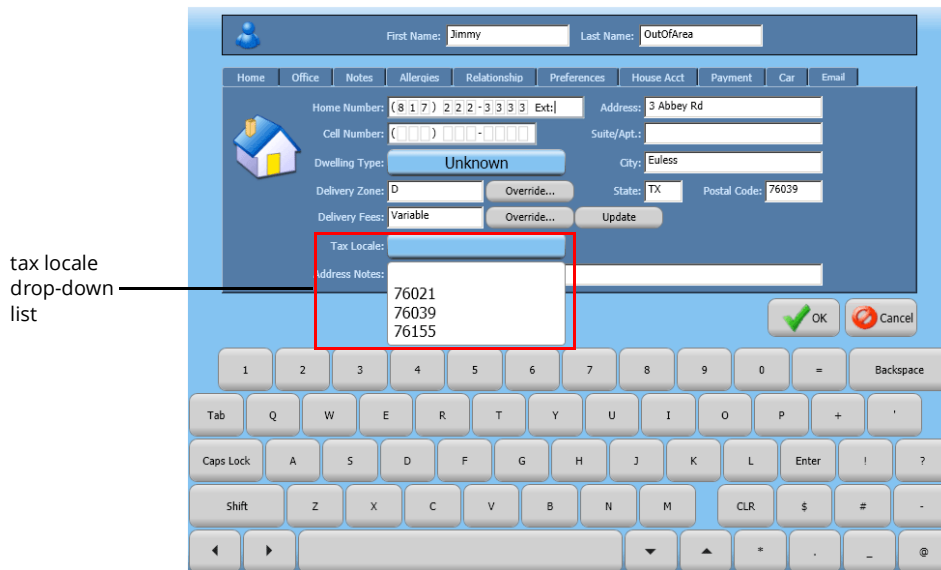
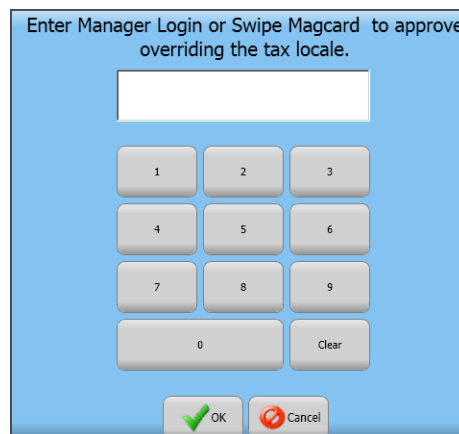


Figure 19 Tax Locale Drop-Down List

2. At the Home tab, select a **tax locale** from the drop-down list.
3. Obtain **authorization**, if necessary. An employee with the ability to override tax locale must authorize this transaction.

If you cannot approve a tax locale override, request **manager assistance**. A manager or employee with sufficient access must enter their **login credentials** to allow the tax locale.



4. At the Customer Details screen, touch **OK**. The Order Confirmation screen appears and the updated tax locale appears in the bottom left portion of the screen.
5. Proceed with the **order** as normal.

Aloha Takeout Tax by Destination

NCR welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following address:

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