

Heartland

Restaurant

Tip Out Configuration and Usage Guide

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Overview

This guide will detail how to configure and use the Tip Out features in Heartland Restaurant.

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Tip Out Settings

There are multiple settings in a few different areas under **Location Setup** for tip out types.

Tip Out Types

Settings for Tip Outs are found in the Admin Portal under **Location Setup** → **Settings** → **Tip Out Types**. From here you can create or edit Tip Out Types. Below is a list of settings and how they affect how a Tip Out will work:

- **Name:** Enter the name you would like to show up on reports and checkouts.
 - It may be beneficial to name the tip out type to correspond with the job type you are tipping out.
 - For example, you may have tip out pools named Busser, Bar or Expo.
- **Tip Pool:** If this is checked this tip out type will work as a pool and will allow staff to allocate tips into a group to be redistributed to individuals based on their hours worked.
- **Type:** This determines how tip outs to a pool or other staff members will be done. Select:
 - **Suggested:** if you would like the **Checkout** to reflect the suggested tip out amounts.
 - If it is set to **Suggested** the employee would still need to manually tip out to the pool or staff directly.
 - **Automatic:** if you want tip outs to be automatically added to the pool upon **Checkout**.
 - If **Tip Pool** is not checked for the Tip Out you will not have this option.
 - **Note:** While this automates tips getting placed into the pool it **does not** automate the distribution of tips from the pool to individual staff members.
- **Job Types:** Select the job types that will need the Tip Out type to show on their checkout report. Staff members of these chosen job types will be expected or required to perform this tip out.
- **Percent:** Select the desired percentage that will be tipped out (based off of Category you select).
- **Category:** Select the category that the Suggested/Automatic tip out will be calculated against for each Staff Member with a Job Type assigned to this tip out. Options include:
 - **Total Tips:** Tip outs will be calculated against the total tips for the Staff Member tipping out.
 - **Gross Sales:** Tip outs will be calculated against the Gross Sales for the Staff Member that is tipping out.
 - **Net Sales:** Tip outs will be calculated against the Net Sales of the Staff Member that is tipping out.
 - If you chose **Gross Sales** or **Net Sales**, you will see a **Report Categories** option appear.
 - If you leave it blank, then it will calculate based off of Total Net or Gross Sales.
 - If you select Report Categories, the tip outs will only calculate Net or Gross sales for those specified report categories.
- **Balancing:** Select **Cash** if you want to balance tip outs with the current day's expected cash. Select **Payroll** if you want to pay tip outs through payroll.

Permissions

There are two permissions options that relate to tip outs. Tip out permissions can be enabled on the Admin Portal under **Location Setup** → **Permissions**.

1. **Manage Tip Pools:** If enabled, a staff member with this permission will be able to distribute tips from a pool to an individual staff member.
2. **Manual Tip Outs:** If enabled, a staff member with this permission will be able to manually tip out a custom dollar amount to an individual.

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- a. By default the system will automatically calculate a tip out based on hours worked.

Settings

Under **Location Setup** → **Settings** → **Cash Management Settings** there is a single setting that may need to be changed to more easily check calculations on checkout reports(if the merchant ever does this).

- **Checkout Report Category Sales:** You can choose for this section to display Net Sales or Gross Sales. If you base your tip outs off of Net or Gross sales for specific Report categories and the merchant sometimes manually checks calculations, it is important to make sure the sales shown matches what you chose for tip outs to calculate from. If all of your tip outs are set to calculate from **Gross Sales** then you will want to configure this setting to **Gross Sales** as well for better alignment.

Using Tip Outs


There are 3 main ways to use tip outs in the Heartland Restaurant App under **User Menu** → **Tip Out**.

The Options you will use depends on how you set up the Tip Out.

Please note that Tip outs that are set to **Automatic** do not go to the Tip Pool to be later redistributed until the Staff Member assigned to this tip out performs their server checkout.

A tip out that is set as **Suggested** will need to be manually sent to a pool for redistribution or tipped out directly to another Staff member on the POS.


Tipping out an Individual Staff Member

- Select the **User Menu**  at the top right.
- Select the **Tip Out** option from the drop down menu.
- In the **Tip Out to** section select **Staff** and choose the staff member you are tipping out.
 - (Optional) Select the **Filter Job Type** option and choose the appropriate job type.
- Select the **Amount** option and type in the dollar amount.
- Optionally you can add a **Comment**.
- Select the **Tip Out** button to complete the tip out.

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Tip Outs	
Tip Out from...	
My Tips	\$10.00
Total Tip Outs	\$0.00
Remaining Tips	\$10.00
Tip Out to...	
Filter Job Type: Server	0.00 hours
Staff: Server 2	
Pool	
Amount	\$2.00
Comment	Tipping Out to a Staff Member
<input type="button" value="Tip Out"/>	

Tipping out to a Pool


- Select the **User Menu**  at the top right.
- Select the **Tip Out** option from the drop down menu.
- In the **Tip Out to** section select **Pool** and choose the desired tip out pool.
- Select **Amount** and enter the desired dollar amount.
- Optionally you can add a **Comment**.
- Select the **Tip Out** button to complete the tip out.

Tip Outs	
Tip Out from...	
My Tips	\$10.00
Total Tip Outs	\$0.00
Remaining Tips	\$10.00
Tip Out to...	
Filter Job Type	
Staff	
Pool	Server Tip Out
Amount	\$5.00
Comment	Tipping Out to a Pool
<input type="button" value="Tip Out"/>	

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Tipping from a Pool to Individual Staff Members

This is the only step you need to do when Automatic Tip Outs are configured.

- Select the **User Menu**  at the top right.
- Select the **Tip Out** option from the drop down menu.
- In the **Tip Out from** section select **My Tips** and change to the desired tip pool.
- Select the **Filter Job Type** option and choose a job type.
- Select the **Staff** option and choose an individual staff member.
- The **Amount** will **auto generate** based on hours worked.
 - You can edit this amount by clicking on the **Amount** option and changing the dollar amount.
- Select the **Tip Out** button to complete the tip out.

Tip Outs	
Tip Out from...	
Server Tip Out	\$0.00
Total Tip Outs	\$0.00
Remaining Balance	\$0.00
Tip Out to...	
Filter Job Type: Server	0.12 hours
Staff: Server 2	(50%) 0.06 hours
Pool	
Amount	\$3.00
Comment	Tipping Out from a Pool to Individual Staff
Tip Out	

Tip Out Usage Scenarios

Below are some example scenarios where and how tips outs are used. Setup may vary depending on your needs. All below scenarios use an 'Automatic' distribution type. If suggested is used, then the process involves manual steps at distribution **and** when tipping out to a pool or staff member initially.

Server Tips out a Bartender based on their Liquor Sales

Description: This tip out would be based on a percentage of the liquor sales (ex. 2% of liquor sales would be tipped to the bartender)

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Example Setup

Bartender



Name (required)

Tip Pool

Tip outs of this type are pooled together and the balance is managed for redistribution.

Type



Job Types

Percent

Category

Report Categories

End of Day Tip Out Procedure - Based on the above setup:

1. Servers perform their server checkouts which will automatically deposit 2% of their Liquor Sales into the 'Bartender' Tip pool on completion of the checkout.
2. Manager with permissions to distribute tips follows the procedure cited [here](#) to manually distribute the tips to bartenders.

All Servers Tip into Pool and get Paid Out based on Hours Worked

Description: Servers pool 100% of their tips. A total of 60 hours were worked in one shift across all Staff Members. If a server works 6 hours in that shift, they would get 10% of the tips. This could also be further divided based on job type.

Example Setup:

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Server




Name (required)

Tip Pool

Tip outs of this type are pooled together and the balance is managed for redistribution.

Type

Job Types

Percent

Category

End of Day Tip Out Procedure - Based on the above setup:

1. Servers perform their server checkouts which will automatically deposit 100% of their Total Tips into the 'Server' Tip pool on completion of the checkout.
2. Manager with permissions to distribute tips follows the procedure cited [here](#) to manually distribute the tips to Servers.

All servers tip into the pool and get paid out based on their sales.

Description: Server makes 65% of the total sales for the night, they would receive 65% of the pool.

Example Setup

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Server

Name (required)
Server

Tip Pool
 Tip outs of this type are pooled together and the balance is managed for redistribution.

Type
Automatic

Job Types
Server

Select a Job Type

Percent
100.00

Category
Total Tips

End of Day Tip Out Procedure - Based on the above setup:

1. Servers perform their server checkouts which will automatically deposit their tips into the appropriate pools at desired percents.
2. Manager with permissions to distribute tips, does so for servers following the procedure cited [here](#) to manually distribute the tips to appropriate persons.
 - a. By default the system will set the amount based on hours worked so, some **manual calculations may need to be done** to base amount off of total sales across multiple employees.

Tip Out Reporting

Tip Out Report

The tip out report allows you to toggle between three views for **Pools**, **Staff** and **Job Types**.

Pools

The pools view will display all tip out types that have been configured as a pool. The total in column will show the amount that has been added to the pool and the total out column will display the amount that was tipped out of the pool to individual staff. The remaining balance is also shown to indicate any tips that were not distributed.

Staff

The staff view will display the staff member, total in column, total out column and Net Column.

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- **Total In:** This is the amount of tip outs received by this staff member\
- **Total Out:** This is the amount of tips that were tipped out by this staff member
- **Net:** This is the difference between the total in and total out columns

Job Types

The job type view will display the same data as the staff view except broken down by job type instead of individual staff.

Checkout Reports

Tip Outs can be found recorded on checkout reports for users tipping out to other users(automatic or manually).