

Tip Calculator

An easy-to-use POS-integrated tip management software that makes tip sharing oh, so simple.

This step-by-step guide will walk you through the process of getting started with Tip Calculator.
This guide is divided into 8 sections:

01 Onboarding

04 Direct tip-out

07 Modifying tips

02 Rules setup

05 Weekly tip-out

08 Square-ups

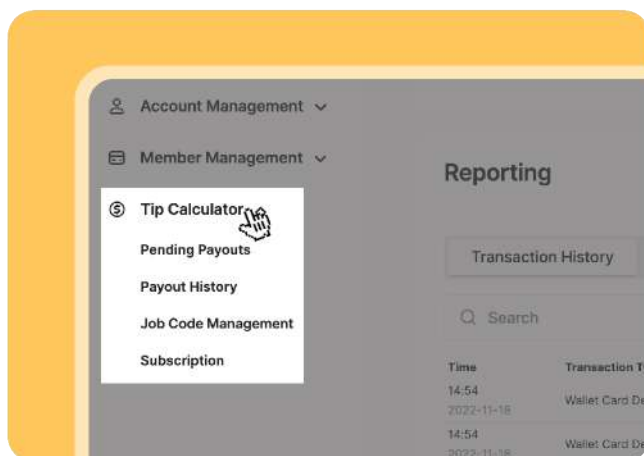
03 Making a payout

06 External tip-out

09 Balance tips

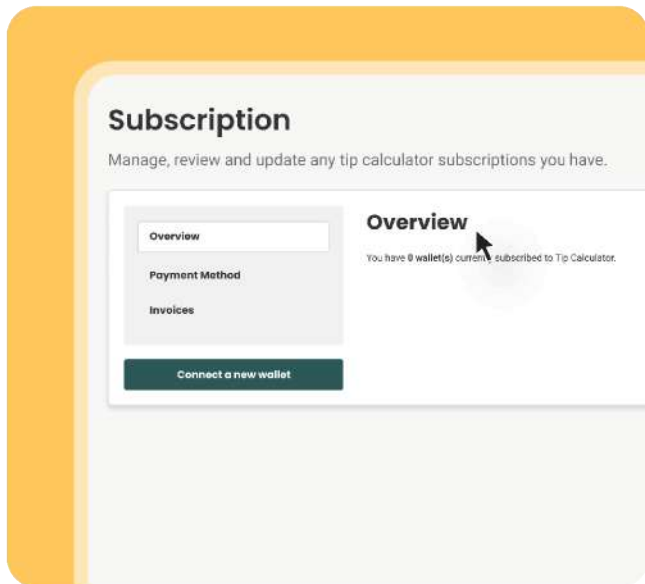
01 Onboarding

This section outlines how to start a new subscription



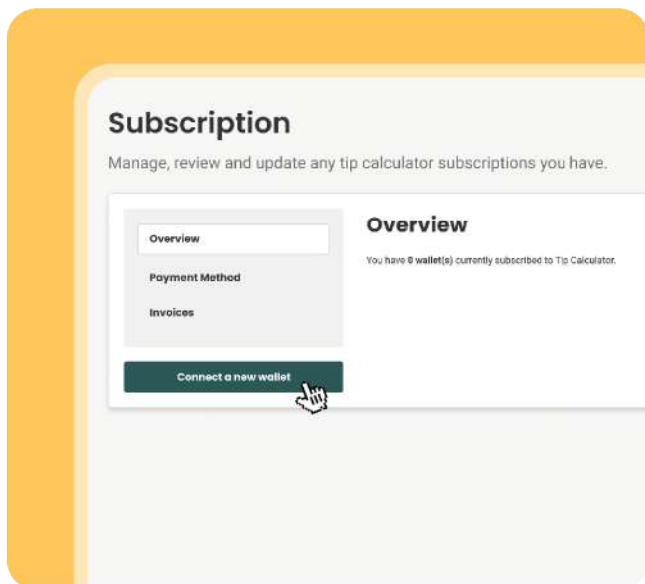
1.1

After logging into your portal, select **“Tip Calculator”** within the navigation bar on your dashboard.



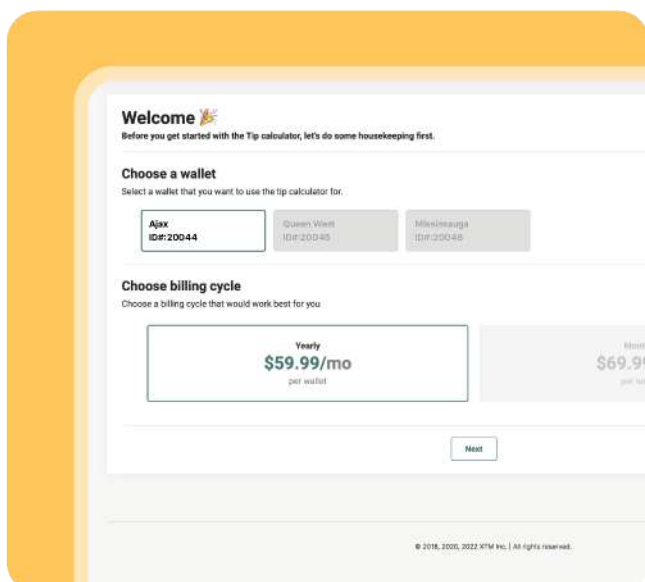
1.2

Click “**Subscription**”. You’ll notice an overview of all the wallets that are setup with your Tip Calculator. If you are doing this for the first time, the overview section will be empty.



1.3

Click the “**Connect a new wallet**” button to connect your first wallet.



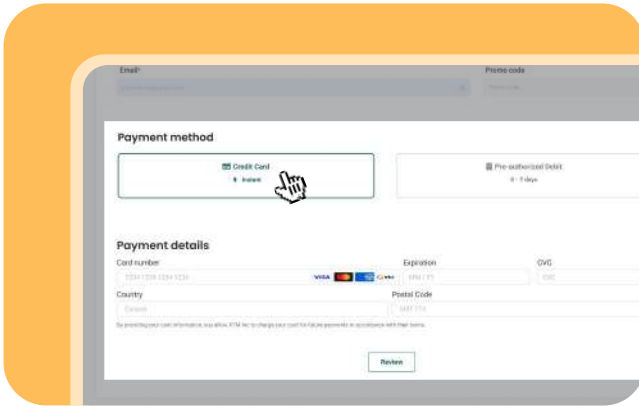
1.4

Select which wallet you want to connect as well as the subscription cycle (only one wallet at a time). Then click “**Next**”.

Tips ✨: there’s a savings of \$120 for the yearly plan!

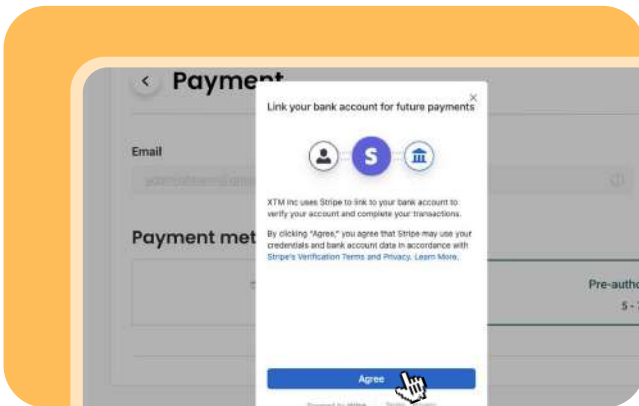
1.5

Enter your email address for invoices. Next, choose your payment method. For **credit cards**, fill in your payment information as usual to continue.



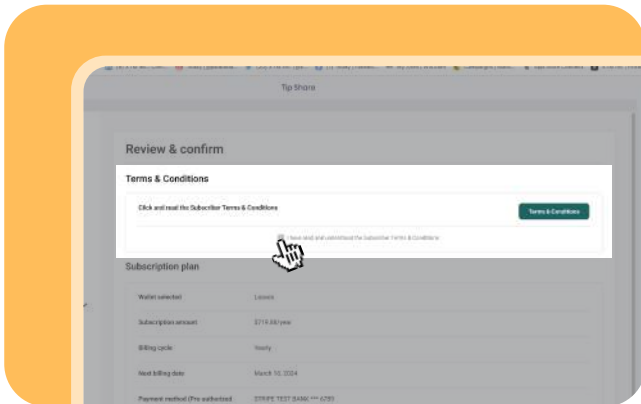
1.6

For **Pre-authorized Debit (PAD)**, a window will popup to login using your banking details and make a payment.



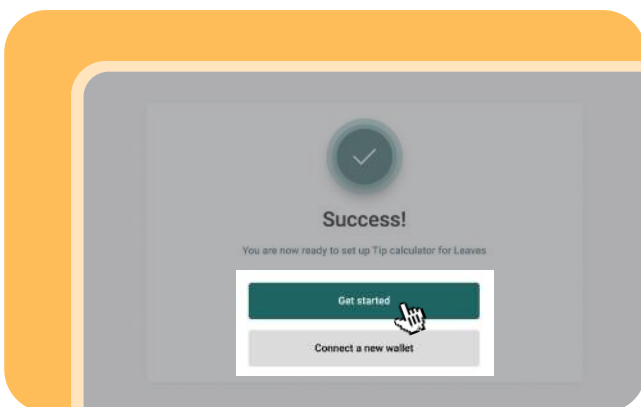
1.7

Once you're payment details are completed, Click "**Confirm and Pay**" after verifying info and agreeing to terms.



1.8

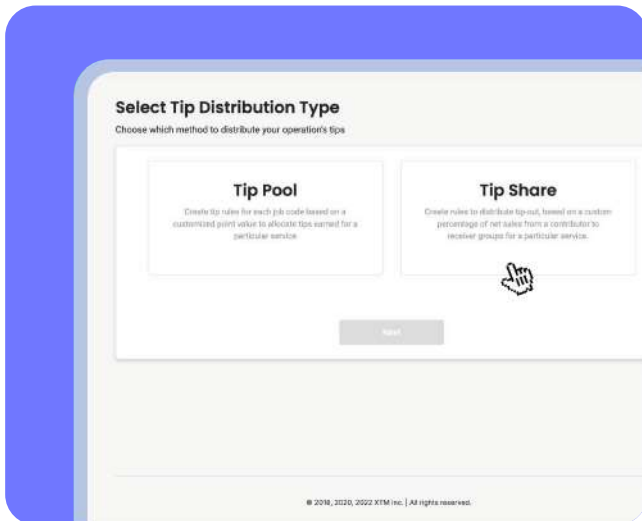
When you see the "**Success**" screen, you can either move to "**Get started**" to set up rules for your calculator or add another location (wallet) and follow the steps 1 through 6.



02

Rules setup

This section outlines how to create rules for your Tip Calculator



2.1

Upon clicking “**Get Started**” from the “**Onboarding**” section, you will be prompted to choose between the “**Tip Pool**” or “**Tip Share**” distribution methods. To clarify the distinction between Tip Pool and Tip Share:

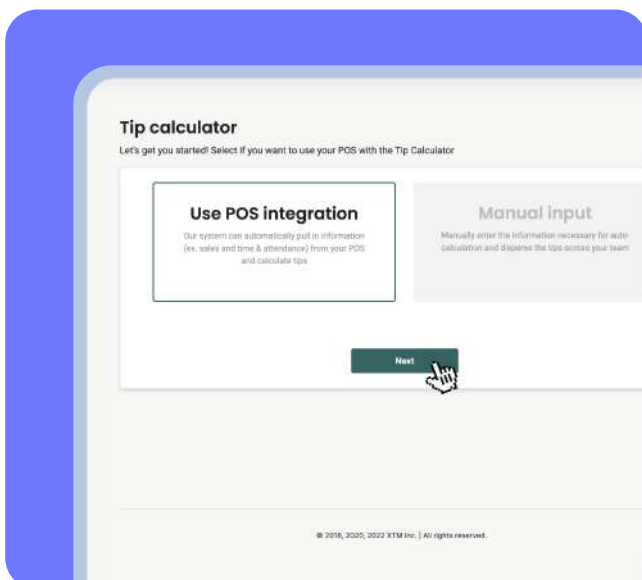
Tip Pool

Tips generated for a particular service are pooled together and distributed to team members for each job code based on a customized point value.

Tip Share

Custom rules determine the percentage breakdown of net sales from the tips generated to receivers groups for a particular service.

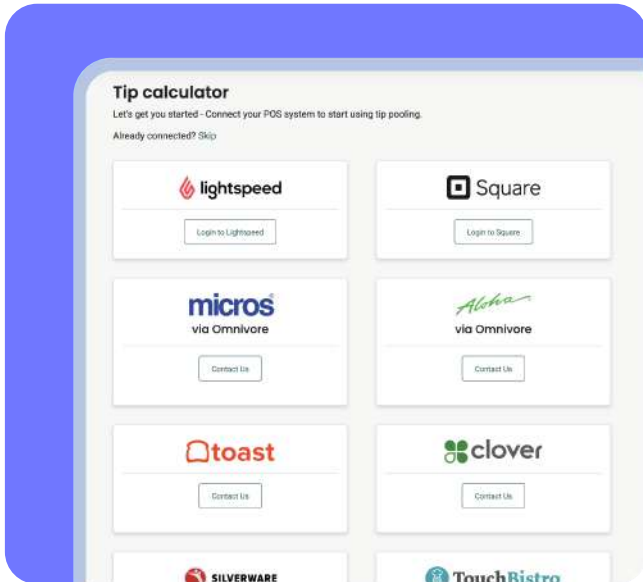
*For this training, we will be setting up the Tip Calculator using Tip Share.



2.2

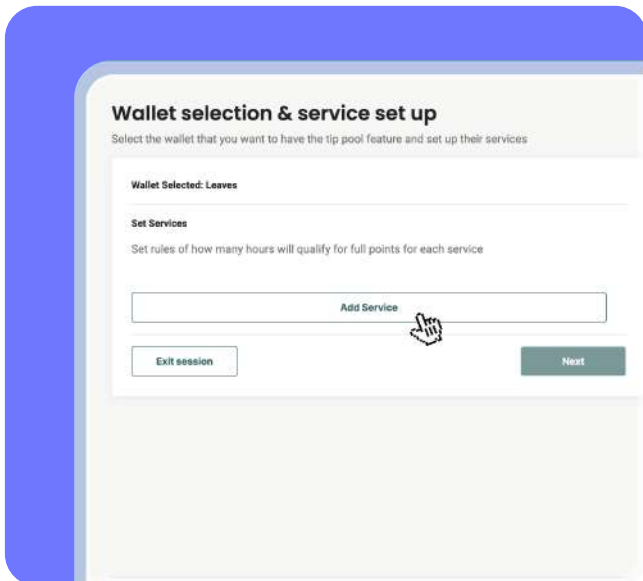
After selecting the distribution type, you can either integrate your calculator with your POS system so that information is pulled automatically for tip calculations, or select “**Manual input**” to manually enter the information required.

*For this training, we will be using the POS integration.



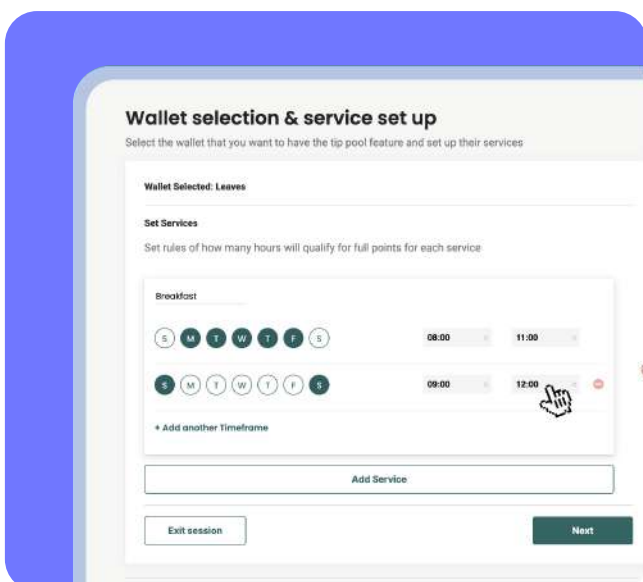
2.3

Choose your POS integration from the list of POS systems. Use your login credentials from your POS admin portal and select “**Allow**” to grant Today dev access.



2.4

“**Service set up**” lets you determine the type of services for your business to allocate tips accordingly. Make sure you are looking at the correct wallet.



2.5

Select “**Add a service**” and name it (e.g. Breakfast, Lunch, Dinner). Select the days and times that the service operates. You can also click “**Add another timeframe**” for the same service if required. A good example would be different time frames for weekday and weekend “Breakfast” service.

2.6

Select the **“Add a service”** button to set up another service schedule (e.g. lunch or dinner service). Once the services are set up, select **“Next”** to proceed.

Note:

- You can easily remove a certain time frame for a service with multiple schedules, by using the “minus” buttons to the right.
- If you want to remove a service completely, you can select the “x” button on the far right.

2.7

On the **“Add job codes”** screen, you will create job codes to establish a list of job titles that exist in your operation. Type in the job title and hit the **“Add job code”** button to create the job code.

2.8

Determine the receipt generators by toggling “on” the button next to the job codes. In this example, it’s the Bartenders & Servers. Hit **“Next”** to create rules for your operation.

Note: Receipt generators are roles that contribute to the operations net sales and generate tips!

Create rules
Create tip share rules to determine how much contributors chip in for the receivers' pool

Contributors for this rule Enter contributor pool name	Job code(s) applied Select contributor job code(s)
↓	
Receivers for this rule Enter receiver pool name	Job code(s) applied Select receiver job code(s)
Contributor percentage If <input type="text"/> % of <input type="text"/> Tip out course <input type="text"/> to the pool	
Service(s) to apply rule Select service(s)	
<input type="button" value="Add a rule"/>	
<input type="button" value="Exit session"/>	

2.9

Since we are using the Tip Share method in this example, creating rules helps automate and portion out the distribution breakdown of tips from receipt generators to the various receivers (non-receipt generators).

Create rules
Create tip share rules to determine how much contributors chip in for the receivers' pool

Contributors for this rule Bar	Job code(s) applied Bartender
↓	
Receivers for this rule Enter receiver pool name	Job code(s) applied Select all <input checked="" type="checkbox"/> Bartender <input type="checkbox"/> Server
Contribution percentage % of net sales to the pool	
Service(s) to apply rule Select service(s)	
<input type="button" value="Add another rule"/>	

2.10

In the “**Contributors for this rule**” section, add the station name (ex. Bar, Kitchen, Front-end). In the “Job code(s) applied” section, select the contributor (receipt generator) roles.

Create rules
Create tip share rules to determine how much contributors chip in for the receivers' pool

Contributors for this rule Bar	Job code(s) applied Bartender
↓	
Receivers for this rule Kitchen	Job code(s) applied Chef Dishwasher Line Cook
Contribution percentage 5 % of net sales to the pool	
Service(s) to apply rule Dinner	
<input type="button" value="Add another rule"/>	
<input type="button" value="Exit session"/>	

2.11

In the example, we assigned “Bartenders” and “Servers” as contributors (receipt generators), so they should appear in this dropdown. We are creating a rule that anyone with the Bartender job code will distribute their tips to the pool of receivers.

2.12

In the “**Receivers for this rule**” section, specify which station the receivers are placed in. By default, all job codes that weren’t selected as contributors (receipt generators) will appear in this dropdown as receivers. In this example, the receivers belong to “Kitchen” and the job codes applied are “Chef”, “Dishwasher”, and “Line Cook.”

2.13

In the “**Contribution percentage**” section, set the percentage for tip distribution. In this example you can see the percentage of net sales is set to 5%.

2.14

Lastly, designate which service these rules apply to. In this example “Dinner” is selected.

As a final recap of this example, the Bartenders will be contributing 5% of their net sales to the kitchen staff which consists of Chefs, Dishwashers, & Line Cooks. This rule only applies when staff clock-in during the Dinner service.

Note: You can remove rules by selecting the “x” on the far right.

Create rules

Create tip share rules to determine how much contributors chip in for the receivers' pool

Contributors	Receivers	Rule	Service(s) to apply rule
Bar	→ Kitchen	5% net sales contribution	Dinner

Contributors for this rule: Enter contributor pool name
Job code(s) applied: Select contributor job code(s)

Receivers for this rule: Enter receiver pool name
Job code(s) applied: Select receiver job code(s)

Contribution percentage: % of net sales to the pool

Service(s) to apply rule: Select service(s)

Add another rule

2.15

Create another rule by selecting “**Add rule**” When selected, you will notice any previous rules saved above.

Rules

Rules to determine how much contributors chip in for the receivers' pool

Receivers	Rule	Service(s) to apply rule
Kitchen	5% net sales contribution	Dinner
Kitchen	5% net sales contribution	Dinner
Support	1% net sales contribution	Dinner
Support	1% net sales contribution	Dinner
Bar	2% net sales contribution	Dinner

Add another rule

Next

2.16

Once you've created all of your rules for your different services, hit “**Next**” to proceed.

Import members

Add new users from Lightspeed

Staff ID	First name	Last name
25367	Jordan	Fisher

1234567890

Mobile number: No country code. 10 digit numbers only. Ex 5559991234

Staff ID

First name

12452

Taylor

t.nguyen@em

Mobile number: No country code. 10 digit numbers only. Ex 5559991234

Exit session

2.17

For the “**Importing Members**” section, employee information in this screen example is automatically pulled from the POS system

Import members
Add new users from Lightspeed

Staff ID	First name	Last name
25367	Jordan	Fisher

1234567890

Mobile number: No country code. 10 digit numbers only.
Ex 5559991234

t.nguyen@email.com

12452 Taylor Nguy

Mobile number: No country code.
Ex 5559991234

Barback Dishwasher

2.18

Assign the different job codes to each employee.

Note: Job codes need to be created in order to appear in the dropdown.

Import members
Add new users from Lightspeed

Staff ID	First name	Last name
25367	Jordan	Fisher

1234567890

Mobile number: No country code. 10 digit numbers only.
Ex 5559991234

t.nguyen@email.com

12452 Taylor Nguy

Mobile number: No country code.
Ex 5559991234

Barback Dishwasher

2.19

In this example, Jordan works as a Barback and some days as a Dishwasher. To account for this, an employee can be assigned to more than 1 job code.

com

6187283943

Mobile number: No country code. 10 digit numbers only.
Ex 5559991234

Bartender Server

Submit

2.20

Once all the information is filled in, hit **“Submit”** to proceed.

Congratulations! You're all set. 🎉

An invitation has been sent via SMS or Email to all staff that were imported and assigned a job code(s).

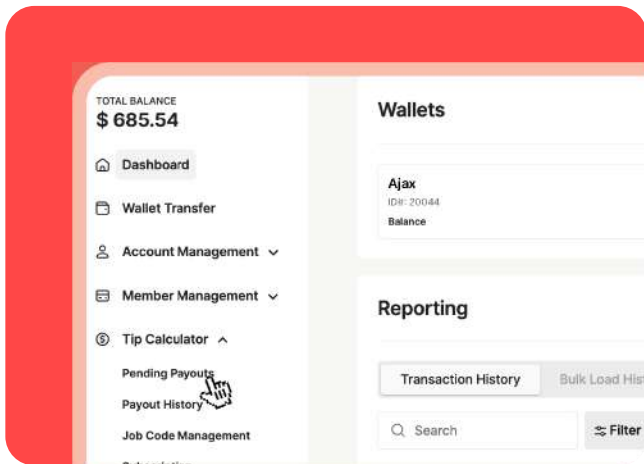
What happens next?

At the end of each shift, Tip Calculator will pull all the data from the POS system and input the data into your dashboard.

03

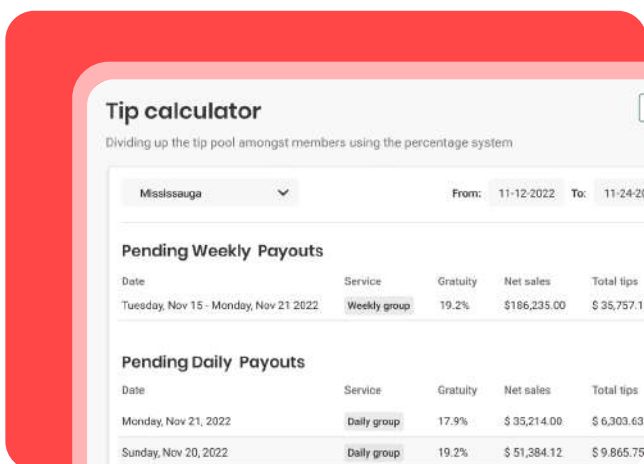
Making a payout

A breakdown of sending your first payout



3.1

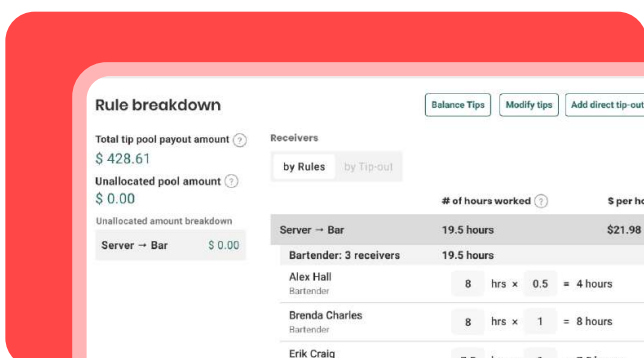
To view your dashboard, service data and make a payout, select “**Pending payouts**” on the left hand navigation bar.



3.2

This page gives the manager an overview of the data pulled in from the POS system at a high level. You can see the date of service, service type (Breakfast, Lunch, Dinner), the average gratuity compared to net sales, the total net sales and tips.

For this example, we'll modify tips on the **daily payout**, but can also be done for weekly payouts. To see a detailed breakdown of each dated service, click the pencil icon to the right. Within the Detailed Breakdown, there are 2 sections:



3.3

The first section is **the rule breakdown section**, we can see the daily rules, which allow tips to be collected and updated at the end of each shift.

A screenshot of a software interface showing a table of employee hours and a rule description. The table lists three bartenders: Alex Hall (8 hrs x 0.5 = 4 hours), Brenda Charles (8 hrs x 1 = 8 hours), and Erik Craig (7.5 hrs x 1 = 7.5 hours). Below the table, a rule is described: 'Server & Bar → Support & Kitchen'. A tooltip explains: 'This rule is under a weekly service; you can view the full receive For now, you can view what each contributor chipped in this rule'.

Alex Hall Bartender	8	hrs	x	0.5	=	4 hours
Brenda Charles Bartender	8	hrs	x	1	=	8 hours
Erik Craig Bartender	7.5	hrs	x	1	=	7.5 hours

Server & Bar → Support & Kitchen

ⓘ This rule is under a weekly service; you can view the full receive For now, you can view what each contributor chipped in this rule

3.4

However, the rules set for this scenario are applied on the **weekly cycle**. As a result, you can view a breakdown under the weekly payout schedule.

A screenshot of a software interface showing a table with buttons and a summary of hours worked and tips earned. The buttons are 'Balance tips', 'Modify tips', 'Add direct tip-out', and 'View contribution breakdown'. The table shows a summary of 19.5 hours worked at \$21.98 per hour, resulting in \$428.62 in tips earned. A hand cursor is pointing at the 'View contribution breakdown' button.

percentage system

Share with Team Print

Balance tips Modify tips Add direct tip-out View contribution breakdown

# of hours worked	\$ per hour	Tips earned
19.5 hours	\$21.98	\$428.62
19.5 hours		\$428.62

3.5

For a more visual representation, click “**View contribution breakdown**” to see how much each contributor made and added per role.

A screenshot of a software interface showing a 'Contribution breakdown' chart. The chart displays the contributions of four members: Brenda Charles (\$207.16), Avah Kelly (\$275.00), Erik Craig (\$273.90), and Carley Campbell. A hand cursor is pointing at the 'Server & Bar → Support & Kitchen' rule in the 'Rules overview' section.

Contribution breakdown

View rules by: Daily Service

Server & Bar → Support & Kitchen 5.5% net sales

Rules overview

Server & Bar → Support & Kitchen

Brenda Charles	\$207.16
Avah Kelly	\$275.00
Erik Craig	\$273.90
Carley Campbell	

3.6

We can see how each member contributed in the cases of **Server & Bar** to **Support & Kitchen**.

A screenshot of a software interface showing a 'Contribution breakdown' chart. The chart displays the contributions of four members: Brenda Charles (\$207.16), Avah Kelly (\$275.00), Erik Craig (\$273.90), and Carley Campbell. A hand cursor is pointing at the 'Daily Service' dropdown menu, which is currently set to 'Server & Bar → Support & Kitchen'.

Contribution breakdown

View rules by: Daily Service

Server & Bar → Support & Kitchen 5.5% net sales

Rules overview

Server & Bar → Support & Kitchen

Brenda Charles	\$207.16
Avah Kelly	\$275.00
Erik Craig	\$273.90
Carley Campbell	

3.7

With this dropdown, we can easily switch between **daily** and **weekly** breakdowns.

3.8

Going back, we can see the rules that we setup previously, as well as who the contributors and the receivers are. The total number of hours worked by the receivers is displayed here and can be adjusted.

3.9

The second box is a multiplier, which is also adjustable and allow for tip distribution to vary based on the employee's level of experience

3.10

The sum of the tips distributed to the receivers and how they were distributed are shown here.

3.11

The second section is **Pending Payout Breakdown**, where we see the contribution breakdown of each contributor.

by Rules		by Tip-out	
		# of hours worked ?	\$ per
Server → Bar		19.5 hours	\$21.9
Bartender: 3 receivers		19.5 hours	
Alex Hall Bartender	8 hrs × 0.5	= 4 hours	
Brenda Charles Bartender	8 hrs × 1	= 8 hours	
Erik Craig Bartender	7.5 hrs × 1	= 7.5 hours	
Server & Bar → Support & Kitchen			

Server → Bar		19.5 hours	\$21.98
Bartender: 3 receivers		19.5 hours	
Alex Hall Bartender	8 hrs × 0.5	= 4 hours	
Brenda Charles Bartender	8 hrs × 1	= 8 hours	
Erik Craig Bartender	7.5 hrs × 1	= 7.5 hours	
Server & Bar → Support & Kitchen			

		# of hours worked ?	\$ per hour	Tips earned	
		19.5 hours	\$21.98	\$428.61	^
Bartender: 3 receivers		19.5 hours		\$428.61	^
		8 hrs × 0.5 = 4 hours		\$87.92	
		8 hrs × 1 = 8 hours		\$175.84	
		7.5 hrs × 1 = 7.5 hours		\$164.85	
Support & Kitchen				\$689.15	^

Pending tip pool on Tuesday, March 09, 2023 for Daily group				
Net sales	Contributors			
\$35,214.00	9 contributors			
Avg. gratuity %	Gratuity	Net sales	Total tips	Total in \$
17.9%				
Total tips earned				
\$6,303.63				
	Bartender: 3 contributors	19%	\$13,783.00	\$2,598.74
	Alex Hall	20%	\$3,400.00	\$680.00
	Brenda Charles	18%	\$5,403.00	\$972.54
	Erik Craig	19%	\$4,980.00	\$946.20
	Server: 6 contributors	17.5%	\$21,431.00	\$3,704.89

3.12

It also provides us with a summary of each member's performance. Because we payout daily in this example, only those who receive tips on a daily basis will be listed.

3.13

We can see each member's average gratuity, net sales, total tips, contribution, and take home tips.

3.14

This column contains the amount that will be distributed to each member.

3.15

At the bottom, you can see here the total amount that is going to be paid out for this cycle.

Pending tip pool on Tuesday, March 09, 2023 for Daily group

Net sales					
\$ 35,214.00					
Avg. gratuity %					
17.9%					
Total tips earned					
\$6,303.63					

Contributors					
9 contributors					
	Gratuity	Net sales	Total tips	Total in pocket	
Bartender: 3 contributors	19%		\$2,598.74	\$758.06	\$758.06
Alex Hall Bartender	20%	\$3,400.00	\$680.00	\$187.00	\$187.00
Brenda Charles Bartender	18%	\$5,403.00	\$972.54	\$297.16	\$297.16
Erik Craig Bartender	19%	\$4,980.00	\$946.20	\$273.90	\$273.90
Server: 6 contributors	17.5%	\$21,431.00	\$3,704.89	\$1,714.48	\$1,714.48
Avah Kelly Server	15%	\$5,000.00	\$750.00	\$400.00	\$400.00

Contributors					
9 contributors					
	Gratuity	Net sales	Total tips	Contribution	In pocket
Bartender: 3 contributors	19%	\$13,783.00	\$2,598.74	\$758.06	\$1,840.68
Alex Hall Bartender	20%	\$3,400.00	\$680.00	\$187.00	\$493.00
Brenda Charles Bartender	18%	\$5,403.00	\$972.54	\$297.16	\$675.38
Erik Craig Bartender	19%	\$4,980.00	\$946.20	\$273.90	\$672.30
Server: 6 contributors	17.5%	\$21,431.00	\$3,704.89	\$1,714.48	\$1,990.41
Avah Kelly Server	15%	\$5,000.00	\$750.00	\$400.00	\$350.00
Carley Campbell	20%	\$4,931.00	\$966.20	\$483.68	\$618.52

Contributors					
9 contributors					
	Gratuity	Net sales	Total tips	Contribution	In pocket
Bartender: 3 contributors	19%	\$13,783.00	\$2,598.74	\$758.06	\$1,840.68
Alex Hall Bartender	20%	\$3,400.00	\$680.00	\$187.00	\$493.00
Brenda Charles Bartender	18%	\$5,403.00	\$972.54	\$297.16	\$675.38
Erik Craig Bartender	19%	\$4,980.00	\$946.20	\$273.90	\$672.30
Server: 6 contributors	17.5%	\$21,431.00	\$3,704.89	\$1,714.48	\$1,990.41
Avah Kelly Server	15%	\$5,000.00	\$750.00	\$400.00	\$350.00
Carley Campbell	20%	\$4,931.00	\$966.20	\$483.68	\$618.52

Contributors					
9 contributors					
	Gratuity	Net sales	Total tips	Contribution	In pocket
Bartender: 3 contributors	19%	\$13,783.00	\$2,598.74	\$758.06	\$1,840.68
Alex Hall Bartender	20%	\$3,400.00	\$680.00	\$187.00	\$493.00
Brenda Charles Bartender	18%	\$5,403.00	\$972.54	\$297.16	\$675.38
Erik Craig Bartender	19%	\$4,980.00	\$946.20	\$273.90	\$672.30
Server: 6 contributors	17.5%	\$21,431.00	\$3,704.89	\$1,714.48	\$1,990.41
Avah Kelly Server	15%	\$5,000.00	\$750.00	\$400.00	\$350.00
Carley Campbell	20%	\$4,931.00	\$966.20	\$483.68	\$618.52

3.16

Once the information has been reviewed and confirmed by the manager, they can hit “Payout now”.

Contributors					
9 contributors			Total in pocket: \$3,831.09		
	Gratuity	Net sales	Total tips	Contribution	In pocket
Bartender: 3 contributors	19%	\$13,783.00	\$2,598.74	\$758.06	\$1,840.68
Alex Hall Bartender	20%	\$3,400.00	\$680.00	\$187.00	\$493.00
Brenda Charles Bartender	18%	\$5,403.00	\$972.54	\$297.16	\$675.38
Erik Craig Bartender	19%	\$4,980.00	\$946.20	\$273.90	\$672.30
Server: 6 contributors	17.5%	\$21,431.00	\$3,704.89	\$1,714.48	\$1,990.41
Arah Kelly Server	15%	\$5,000.00	\$750.00	\$400.00	\$350.00
Carley Campbell	20%	\$4,331.00	\$866.20	\$433.10	\$515.52



TOTAL BALANCE
\$1,262.53

Dashboard

Wallet Transfer

Account Management

Member Management

Tip Calculator

Pending Payouts

Payout History

Job Code Management

Subscription

Payout History

Select a wallet to view the payout history: Ajax



Search services

Show: 10 20 30 40 All

Date	Service	Gratuity	Net sales	Total
Saturday, September 17, 2022	Dinner	17.9%	\$35,214.00	\$6,300.00

You're all set! 🎉

Members should receive an SMS or Email notification about receiving payment to the Today Wallet. Enjoy the hassle-free tip calculation and distribution!

04 Making a direct tip-out

This allows users to redirect tips to specific members instead of paying out by job codes.

The screenshot shows the 'Direct tip-out' form with the 'Contributor(s)' dropdown menu open. The menu lists several staff members with their IDs, names, and job titles. A hand cursor is pointing at 'Adam Build' (Server). The list includes:

ID	Name	Job Title
123456	Adam Build	Server
123457	Anton Smith	Bartender
123458	Barbra Lee	Bartender
123459	Benjamin Hopper	Server
123460	Anthony Jack	Server
123461	Alexa Song	Server
123462	Brian Tomlin	Server

A 'Submit' button is visible at the bottom of the form.

4.1

Select the contributor, from this drop down, who is tipping out a particular employee. Note that this dropdown ONLY includes the clocked-in staff who are receipt generators. For this example, we'll use Adam as the contributor.

The screenshot shows the 'Direct tip-out' form with the 'Receiver(s)' dropdown menu open. The menu lists several staff members with their IDs, names, and job titles. A hand cursor is pointing at 'Anne Gable' (Server assistant). The list includes:

ID	Name	Job Title
123448	Anne Gable	Server assistant
123449	Dawn Dupont	Line cook
123450	Darryl Timms	Barback
123451	Kennedy Burton	Dishwasher
123452	Odin Knowles	Line cook
123453	Hayley Knott	Line cook
123454	Emma Valencia	Line cook

The 'Contributor(s)' dropdown is set to 'Adam Build'. A 'Submit' button is visible at the bottom of the form.

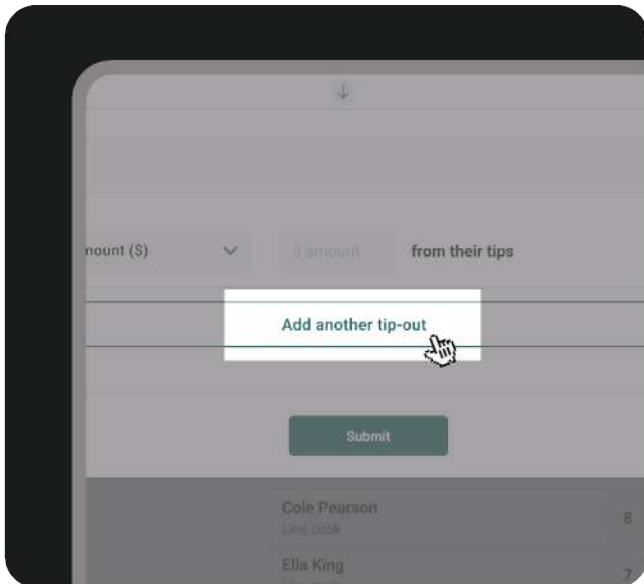
4.2

Select the receiver of this direct tip-out using this dropdown menu, which includes ALL of the clocked-in staff for this particular service. For this example, we'll use Anne as the receiver.

The screenshot shows the 'Direct tip-out' form with the 'Tip-out by' dropdown menu open. The menu lists several options: 'Percentage (%)', 'Fixed amount', and 'Total tips'. A hand cursor is pointing at 'Percentage (%)'. The 'Contributor(s)' dropdown is set to 'Adam Build' and the 'Receiver(s)' dropdown is set to 'Anne Gable'. The 'Contribution amount' is set to '2 % of'. A 'Submit' button is visible at the bottom of the form.

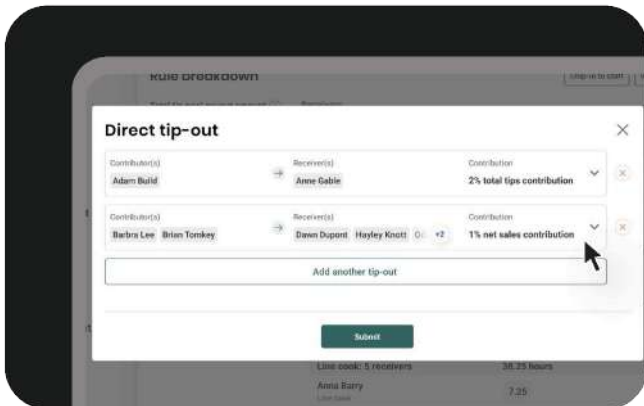
4.3

Here is where you choose the tip-out method, which can be by percentage or a fixed amount. With the percentage option, determine the % amount from either the contributors net sales, or total tips. With a fixed amount, simply input a dollar value of the contributors total tips.



4.4

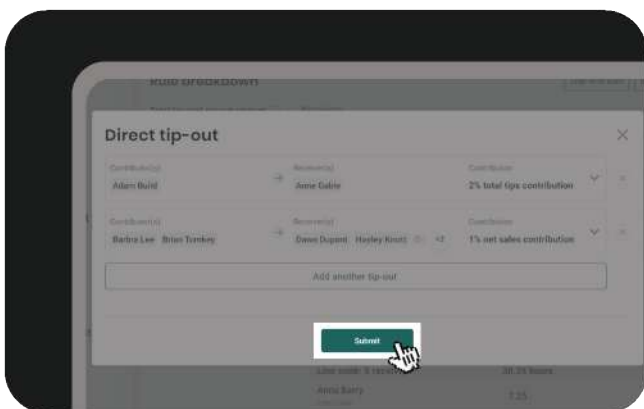
Used the “**Add another tip-out**” button to set up another direct tip-out.



4.5

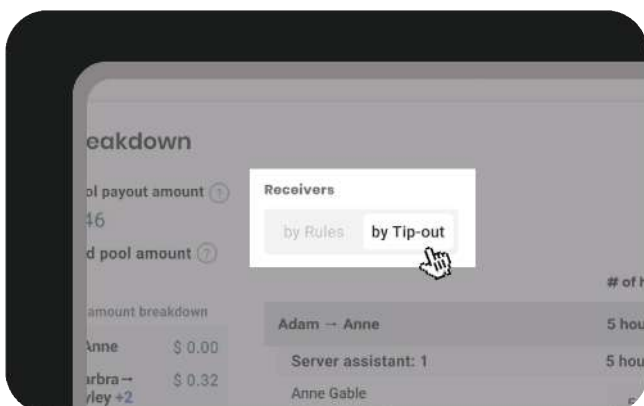
Once complete, you should have something like this:

The “**x**” on the right will delete the tip-outs selected.



4.6

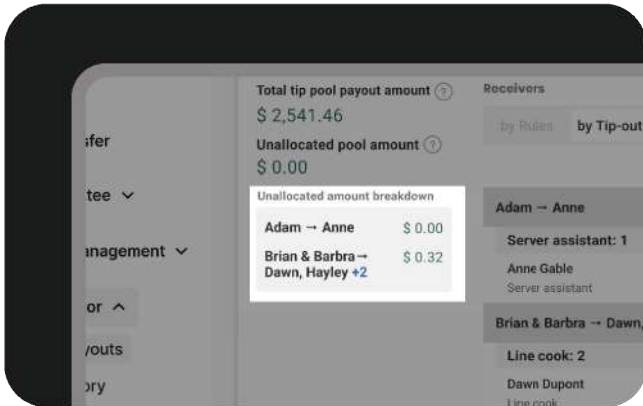
Once reviewed that all the information is correct, submit your direct tip-outs.



4.7

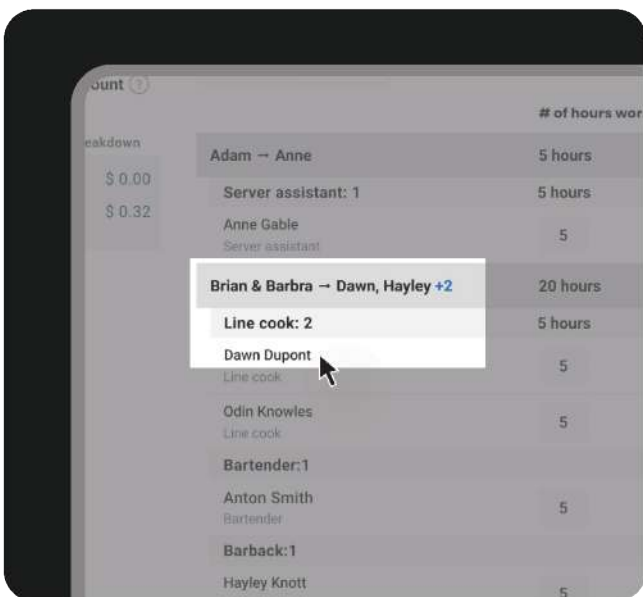
Upon submission, the layout of your screen will change. You can now toggle the tip breakdown by rules, or by tip-out.

Note: This toggle option only appears if direct tip-outs have been set up.



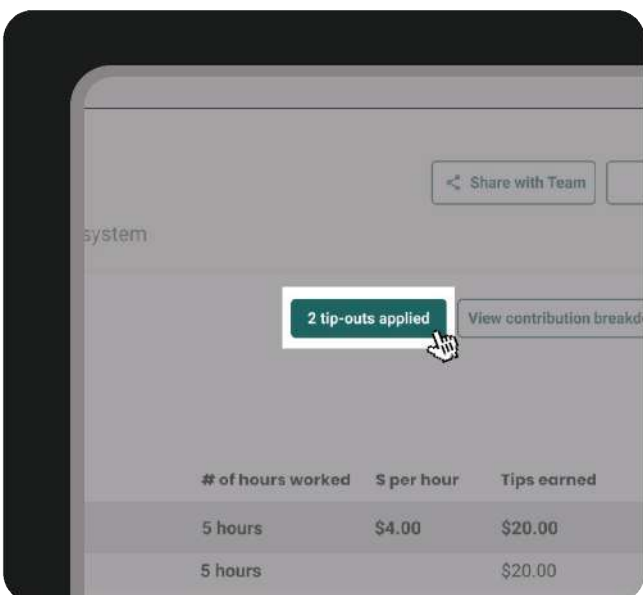
4.8

Additionally, you can see a summary of the direct tip-out flow and a detailed breakdown of the direct tip-out in this section.



4.9

If you want to see all the receivers in this direct tip-out, simply hover over the numerical value to display them.



4.10

You can always go back and make adjustments to your direct tip-outs by selecting this button.

Pending tip pool on September 17 for Dinner service

Net sales

\$ 35,214.00

Avg. gratuity %

17.9%

Total tips earned

\$6,303.63

Contributors

9 contributors

	Gratuity	Net
Bartender: 3 contributors	19%	\$1,100.00
Alex Hall Bartender	20%	\$3,000.00
Brenda Charles Bartender	18%	\$5,000.00
Erik Craig Bartender	19%	\$4,000.00
Server: 6 contributors	17.5%	\$2,000.00
Avah Kelly Server	15%	\$5,000.00
Carley Campbell Server	20%	\$4,000.00
Damon Buckley Server	18%	\$3,000.00
Gerald Adams		

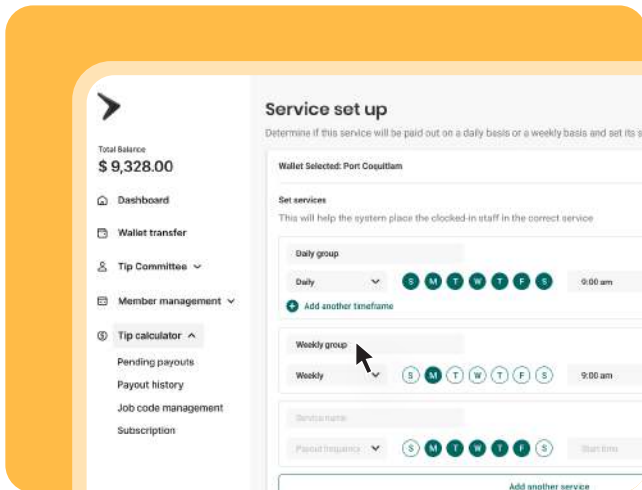
4.11

To make a payout, simply head over to the “**Pending Payouts**” section and follow the steps to “**Making a payout.**”

05

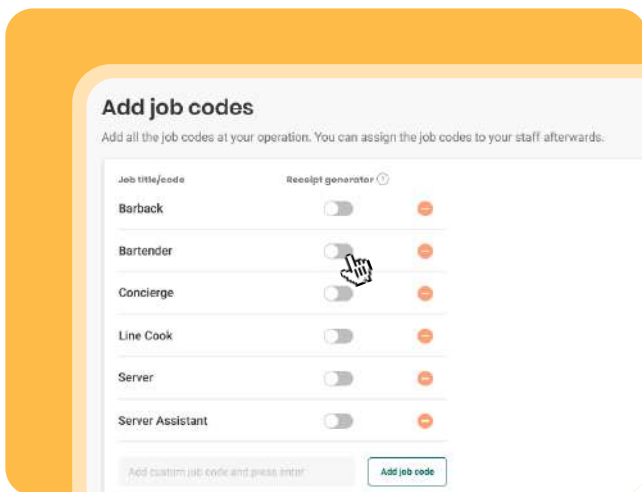
Making a weekly tip-out

This allows users to set up rules to pay out team members in weekly basis.



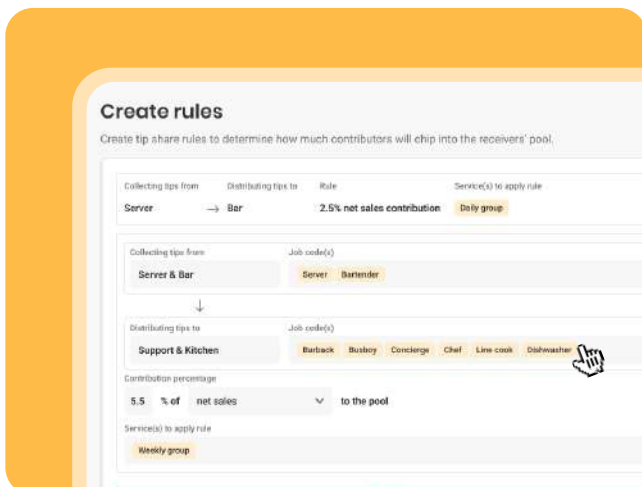
5.1

Go to the service set up page. Add a new service and select “**Weekly**” as the payout frequency to create a weekly payout rule. Here, we named it “**Weekly group**”.



5.2

Add job codes and select receipt generators as usual.



5.3

Add a new rule - enter the tip contributor, receiver and the amount/percentage like you used to. Then select the weekly service you created to apply the rule. Hit “**Next**”.

Import members

Add new users from your POS

<input type="checkbox"/> Staff ID	First name	Last name	Mobile number/Email	Job code(s) selected
<input type="checkbox"/> 12345678	Steven	Hu	steven.hu@email.com	Job code(s)
<input type="checkbox"/> 12648329	Henry	Thomas	888-111-1234	Job code(s)
<input type="checkbox"/> 12730950	Jenn	Smith	519-123-1234	Job code(s)
<input type="checkbox"/> 13902452	Lawrence	Rockwell	819-098-0987	Job code(s)

[Import members](#)

5.4

Import new members if needed - then you're done with the setup!

Tip calculator

Dividing up the tip pool amongst members using the percentage system

Mississauga From: 11-12-2022 To: 11-24-2022 [Sync tip](#)

Pending Weekly Payouts

Date	Service	Gratuity	Net sales	Total tips	Payout am
Tuesday, Nov 15 - Monday, Nov 21 2022	Weekly group	19.2%	\$186,235.00	\$35,757.12	\$35,757.12

Pending Daily Payouts

Date	Service	Gratuity	Net sales	Total tips	Payout am
Monday, Nov 21, 2022	Daily group	17.9%	\$35,214.00	\$6,309.63	\$3,087.22
Sunday, Nov 20, 2022	Daily group	19.2%	\$51,384.12	\$9,865.75	\$9,323.7

5.5

Once a week, you will see the pending weekly payouts available on the **"Pending payouts"** page

by Rules [by Tip-out](#)

	# of hours worked	\$ per hour	Tips earned
Server → Bar	23.5 hours	\$18.24	\$428.62
Bartender: 3 receivers	23.5 hours		\$428.62
Alex Hall Bartender	8		\$145.91
Brenda Charles Bartender	8		\$145.91
Erik Craig Bartender	7.5		\$136.79
Server & Bar → Support & Kitchen			\$689.15

This rule is under a weekly service; you can view the full receiver list on Nov 21. For now, you can view what each contributor chipped in this rule in the contribution breakdown.

5.6

Inside **"Pending Daily Payouts"**, you'll see all rules running daily, even if it includes a weekly rule - however, we are only paying out the rules that apply on a daily basis here.

by Rules [by Tip-out](#)

	# of hours worked	\$ per hour	Tips earned
Server → Bar	23.5 hours	\$18.24	\$428.62
Bartender: 3 receivers	23.5 hours		\$428.62
Alex Hall Bartender	8		\$145.91
Brenda Charles Bartender	8		\$145.91
Erik Craig Bartender	7.5		\$136.79
Server & Bar → Support & Kitchen			\$689.15

This rule is under a weekly service; you can view the full receiver list on Nov 21. For now, you can view what each contributor chipped in this rule in the contribution breakdown.

5.7

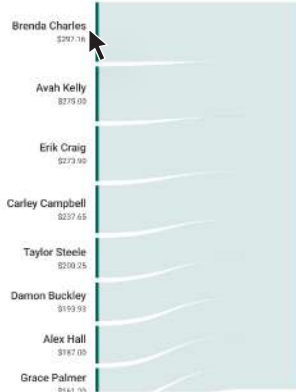
There'll be a call-out underneath the rule if it is under a weekly service: the full receiver list will be available on the payout date

Contribution breakdown

View rules by: **Weekly service** **Server & Bar → Support & Kitchen** 5.5% net sales contribut

Rules overview

Server & Bar → Support & Kitchen



5.8

You can click “**View contribution breakdown**” to check out the details under the weekly rule, in which the payout will be later distributed at the end of the week.

	# of hours worked	\$ per hour	Tips earned	
Server & Bar → Support & Kitchen	576 hours	\$62.07	\$35,757.12	^
Barback: 2 receivers	92 hours		\$5,958.12	^
Christine Wu Barback	56		\$3,475.92	
Holly Andrews Barback	40		\$2,482.20	
Busboy: 2 receivers	80 hours		\$4,965.60	^
Blair Richards Busboy	24		\$1,489.68	
Krik Coleman Busboy	56		\$3,475.92	
Concierge: 2 receivers	80 hours		\$4,960.40	^
Emily O'Brien Concierge	40		\$2,482.20	
Oliver Murray Concierge	40		\$2,482.20	
Chef: 2 receivers	80 hours		\$4,960.40	^
Ashley Benson Chef	40		\$2,482.20	
Isaac Fung Chef	40		\$2,482.20	
Dishwasher: 3 receivers	120 hours		\$7,440.60	^
Janet Lang	40		\$2,482.20	

5.9

For “**Pending Weekly Payouts**”, click the pen icon to “**Edit**”. You will see the full breakdown here including the receiver list and the respective amount, where the money is collected from the tip contributors throughout the week.

Contribution breakdown

Date: **Past 7 days** **Server & Bar → Support & Kitchen** 5.5% net sale

Rules overview

Server & Bar Support & Kitchen

	Net sales	Conti
Server & Bar: 19 contributors		
Alex Hall Bartender	\$3,400.00	\$187
Brenda Charles Bartender	\$5,403.00	\$297
Erik Craig Bartender	\$4,980.00	\$273
Avah Kelly Server	\$5,000.00	\$275
Carley Campbell Server	\$4,321.00	\$237
Damon Buckley Server	\$3,526.00	\$193
Gerald Adams Server	\$2,012.00	\$110
Grace Palmer Server	\$2,931.00	\$161
Hailey Park Server	\$3,641.00	\$200

5.10

Same here - you can click “**View contribution breakdown**” to check the contribution details in different date ranges.

06

Making an external tip-out

Similar to “**Direct tip out**” for daily service, you can pay out a team member directly by a fixed amount or a percentage of the pool.

Dividing up the tip pool amongst members using the percentage system

External tip-out

Select the rule to tip-out from

Select rule

Receiver(s)

Search and select staff to receive tips

Tip-out amount

Tip-out by amount

Add another tip-out

Submit

Chef: 2 receivers

Ashley Benson
Chef

Isaac Fung
Chef

6.1

First, select the rule you want to pull money from, then you can pay it to anyone who has a AnyDay card - not necessary for the receiver to work at the same shift as the contributor.

ive tips

20 % of the pool

Add another tip-out

Submit

Chef: 2 receivers

Ashley Benson
Chef

Isaac Fung
Chef

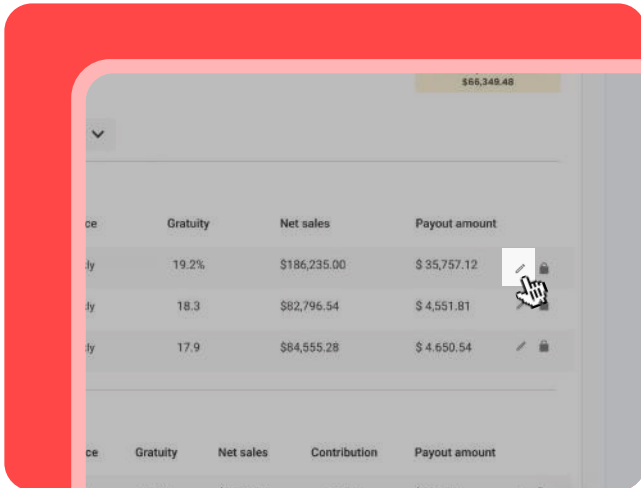
6.2

Hit “**Submit**” after you fill in the information, it will immediately recalculate the rule and payout the amount/percentage directly.

07

Modifying tips

This allows users to manually add or remove specific amounts from the tip pool.

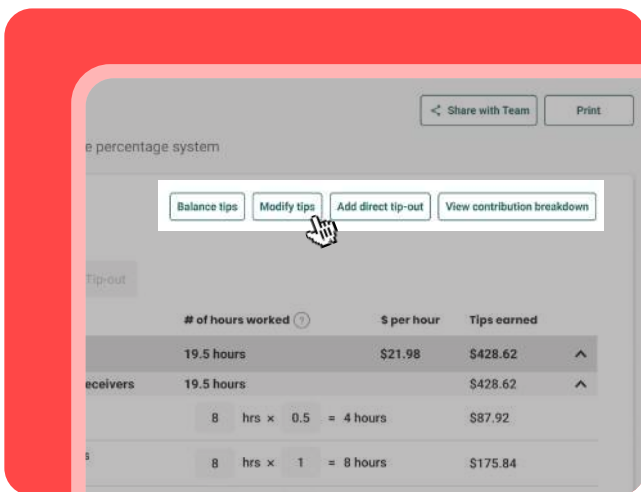


A screenshot of a web application interface showing a table with columns: Gratuity, Net sales, and Payout amount. The table has three rows of data. A hand cursor is pointing at a pencil icon in the right margin of the second row, indicating an edit action.

	Gratuity	Net sales	Payout amount
ly	19.2%	\$186,235.00	\$ 35,757.12
ly	18.3	\$82,796.54	\$ 4,551.81
ly	17.9	\$84,555.28	\$ 4,650.54

7.1

For this example, we'll modify tips on the **weekly payout**, but can also be done for **daily payouts**. To begin, click the pencil icon.

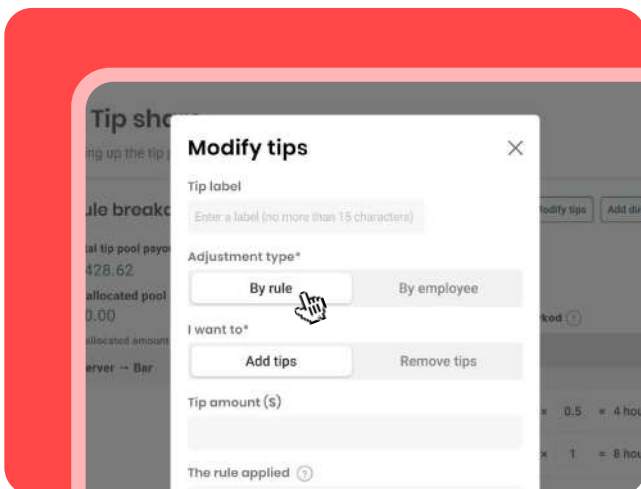


A screenshot of a web application interface showing a table with columns: # of hours worked, \$ per hour, and Tips earned. Above the table is a row of buttons: Balance tips, Modify tips, Add direct tip-out, and View contribution breakdown. A hand cursor is pointing at the 'Modify tips' button.

	# of hours worked	\$ per hour	Tips earned
receivers	19.5 hours	\$21.98	\$428.62
	19.5 hours		\$428.62
	8 hrs × 0.5 = 4 hours		\$87.92
	8 hrs × 1 = 8 hours		\$175.84

7.2

Select the “**Modify tips**” button.



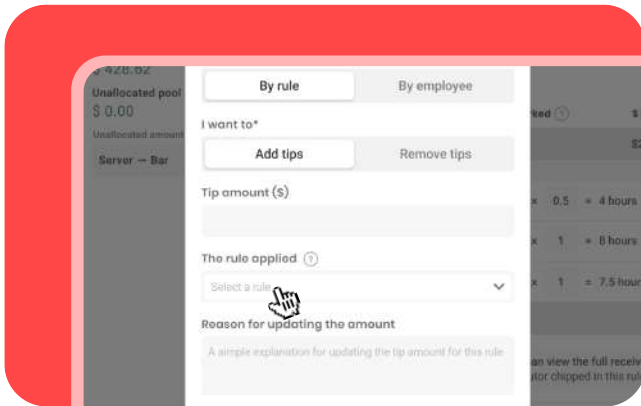
A screenshot of a web application interface showing a 'Modify tips' pop-up form. The form has fields for: Tip label (with a placeholder 'Enter a label (no more than 15 characters)'), Adjustment type* (with buttons 'By rule' and 'By employee'), I want to* (with buttons 'Add tips' and 'Remove tips'), Tip amount (\$), and The rule applied (with a dropdown arrow).

7.3

On this pop-up, we can add the **tip label**, modify for a **staff** or **rule**, and toggle to **add or remove tips**.

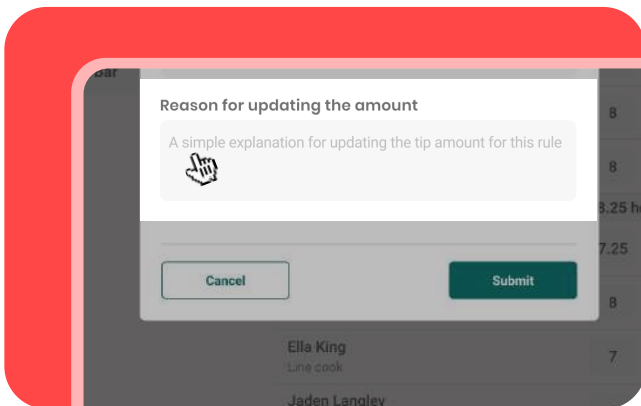
7.4

Selecting either “**By rule**” or “**By employee**” will adjust this dropdown with the option to select a rule applied or staff member in this pending payout.



7.5

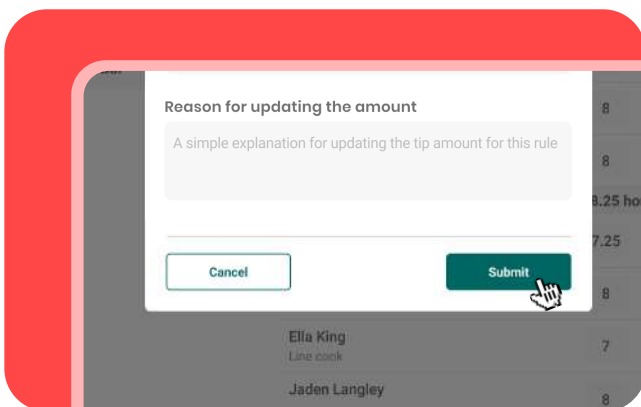
In order to ensure transparency and communication between managers, the option to **leave a note** is available.



7.6

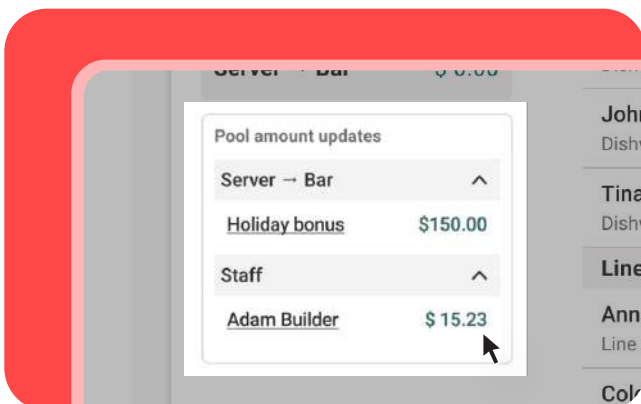
Once we've filled everything in, click submit to modify tips.

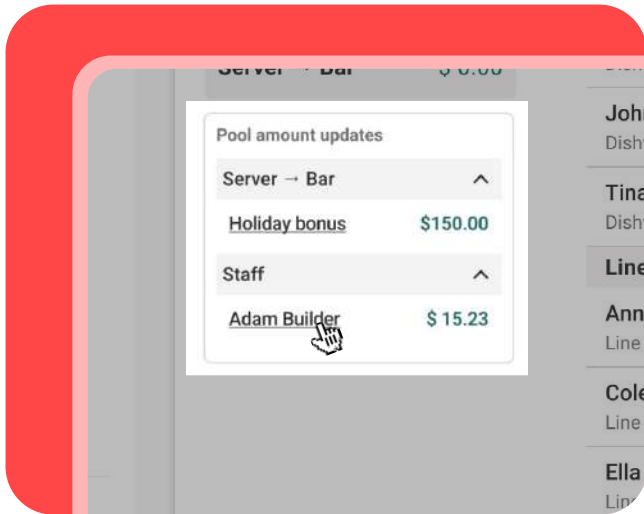
Note: This tip amount will be applied to the "in-pocket" amount of the contributor.



7.7

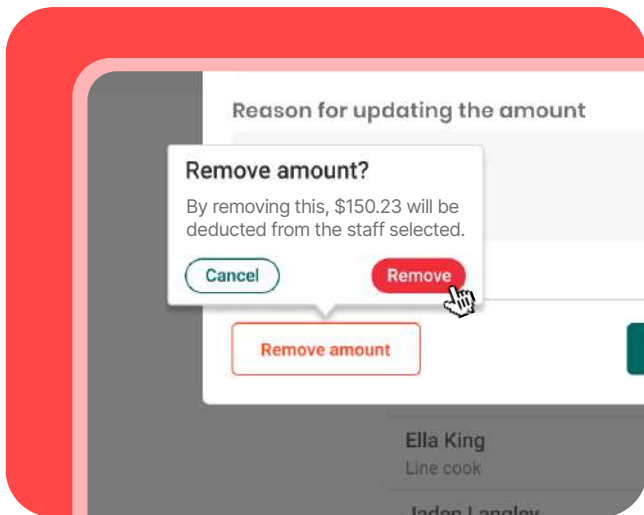
In this section, we can see that we've applied 2 modifications, one applied to a **Rule** and one for a **Staff** member.





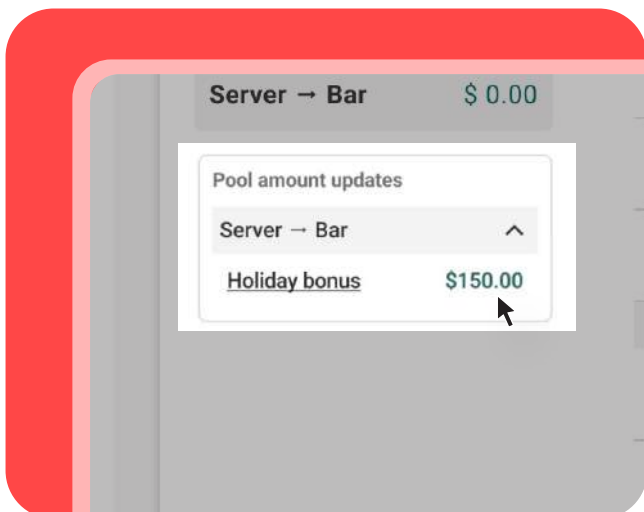
7.8

To **edit any modifications**, simply click on the tip labels.



7.9

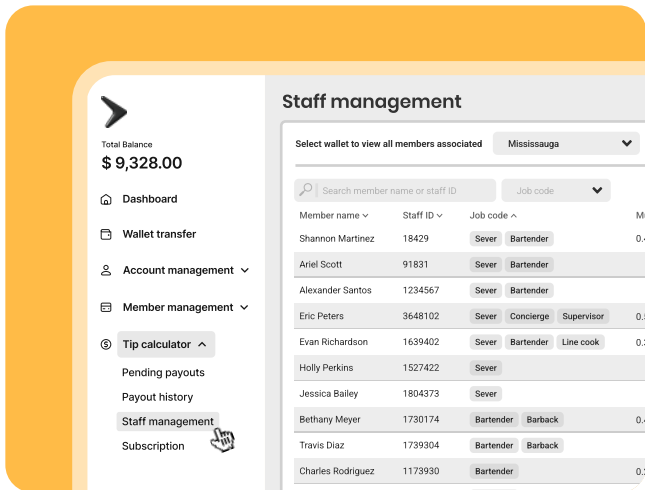
We can either **update or remove the modification**, but for this example we'll select remove. In order to reduce any accidental changes, we need to **confirm** the removal of this modification.



7.10

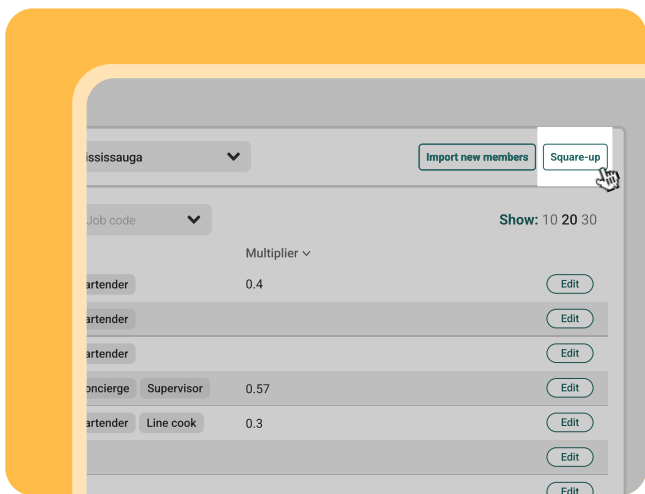
Success! Now we can see the **updated modification summary**.

This feature allows you to schedule payment deductions before a pending payout.



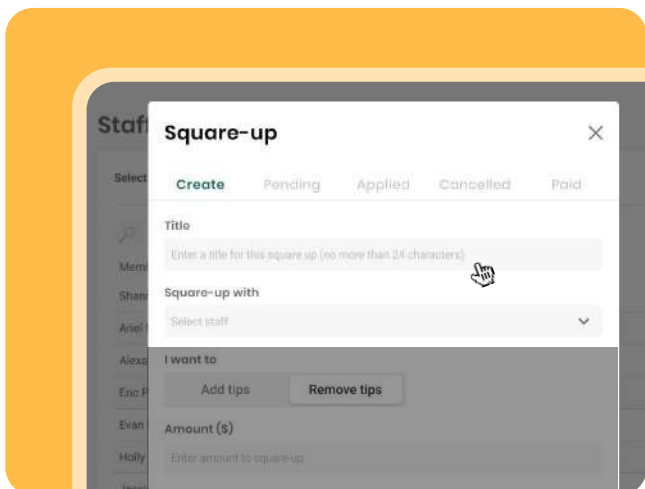
8.1

Select “**Staff management**” under the Tip Calculator section since we are making changes at the staff level.



8.2

Select “**Square-up**” at the upper right corner.



8.3

Create: In this tab, you can create a square-up for a specific staff member. Create a title, and the staff member who will be affected by the change.

Square-up with

Select staff

I want to

Add tips Remove tips

Amount (\$)

Enter amount to square-up

Reason

A simple explanation for why you need to square up

Square-up date (optional)

Select a specific date to apply the square up

8.4

Choose whether you want to add or remove tips, and then enter the amount to be adjusted. Next, leave a brief explanation of why the adjustment is being made.

Square-up

Amount (\$)

\$300.00

Reason

Since Ashley hosted a pizza party and agreed to have it deduct from her tips, I have scheduled a square-up.

Square-up date (optional)

Select a specific date to apply the square up

Cancel Submit

8.5

Optionally, select the date this adjustment will be applied. Otherwise, it'll be automatically applied when that staff clocks in. Once you've filled in everything, click **Submit** to create this square-up.

Square-up

Create Pending Applied Cancelled Paid

Pizza party

Ashley Wong

Since Ashley hosted a pizza party and agreed to have it deduct from her tips, I have scheduled a square-up. - Jane Builder

Scheduled on: Sat, June 10

Lunch

Anton Smith

Adding amount that was mistakenly deducted on May 8th - John Doe

#45

-\$300.00

#31

\$10.12

8.6

Pending: In this tab, you can see all of the created square-ups and delete those that are still pending.

Note: Since we didn't set a date for the one we just created for Ashley, it will stay pending until that staff clocks in.

Square-up

Create Pending Applied Cancelled Paid

Pizza party

Ashley Wong

Since Ashley hosted a pizza party and agreed to have it deduct from her tips, I have scheduled a square-up. - Jane Builder

Scheduled on: Sat, June 10

Lunch

Anton Smith

Adding amount that was mistakenly deducted on May 8th - John Doe

#45

-\$300.00

#31

\$10.12

8.7

Each square-up will be numbered in order to keep track, since they will move in-between tabs.

Note: The description will include the managers name who created the square-up.

8.8

Applied: In this tab, you can view all the square-ups that were applied.

Note: Although Ashley's square-up didn't have a scheduled date, it was applied when the staff member clocked in on the 10th.

8.9

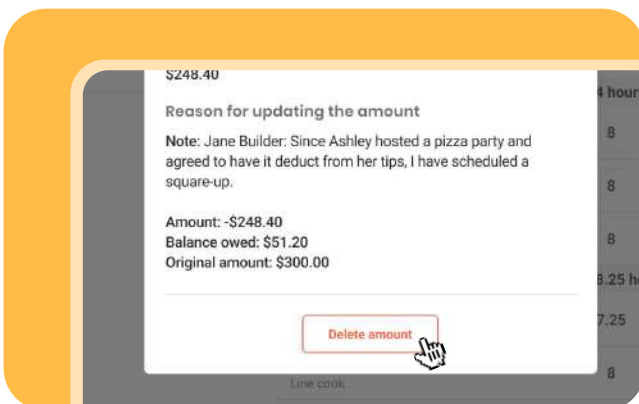
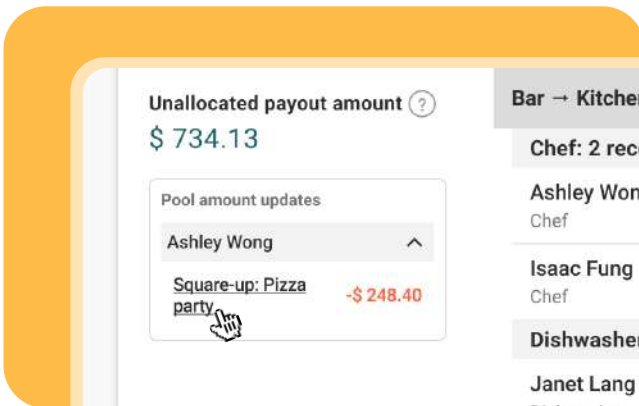
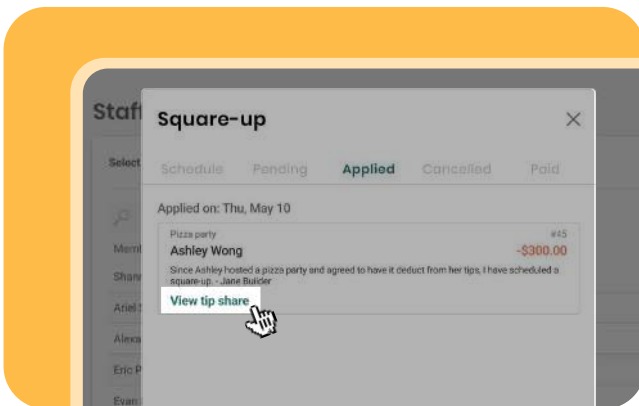
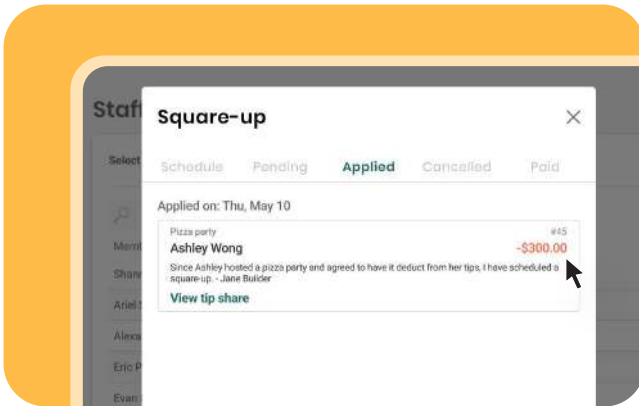
In order to see the tip share this square-up was applied too, click **“View tip share”**.

8.10

When a pending payout is created, the square-up that was applied will now be visible in that payout here. To view a breakdown of this square-up, click the title.

8.11

If a square-up was applied incorrectly and needs to be deleted, click **“Delete amount”**.

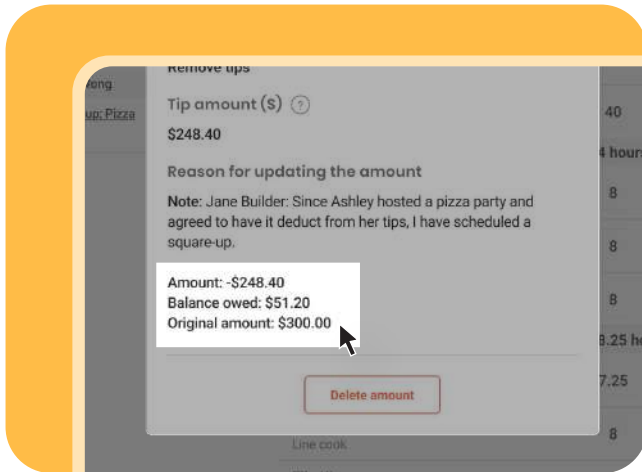


8.12

The original square-up was for \$300.00, but Ashley only had \$248.40 to give.

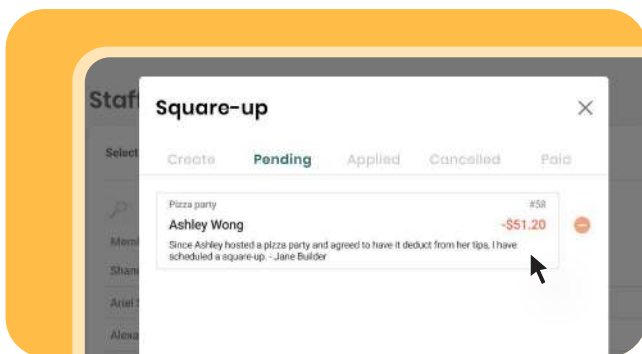
Therefore, there is a balance owing.

Note: If the square-up amount is larger than the amounts of tips the member will receive, an automated note will be generated with the balance owing, and another square-up with the difference will be created.



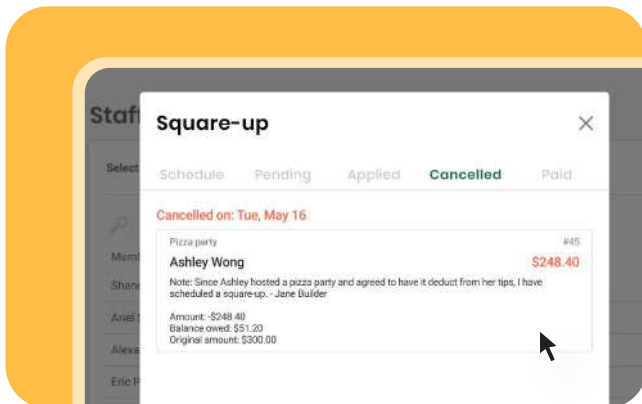
8.13

Going back to the “**Pending**” tab, we can see a new pending square-up for Ashley with the amount owing showing here.



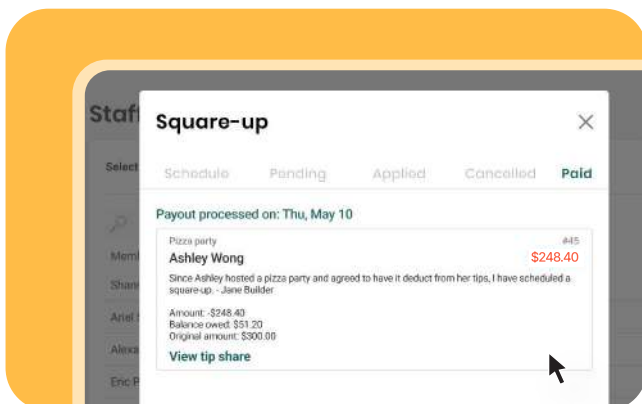
8.14

Cancelled: In this tab, you can see all of the cancelled square-ups. In the previous scenario, if we had cancelled the square-up for Ashley on the pending payout, it would not deduct it from her payout.



8.15

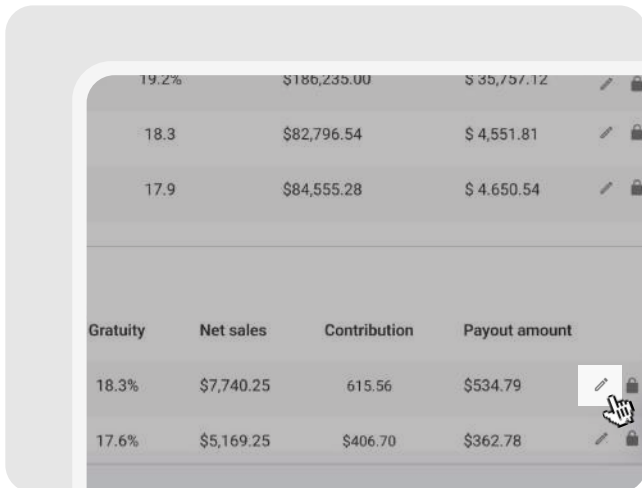
Paid: In this tab, you can see all of the square-ups that have been applied and paid-out. If we don't cancel Ashley's square-up, we would see the amount paid and balance owing here.



09

Balance tips

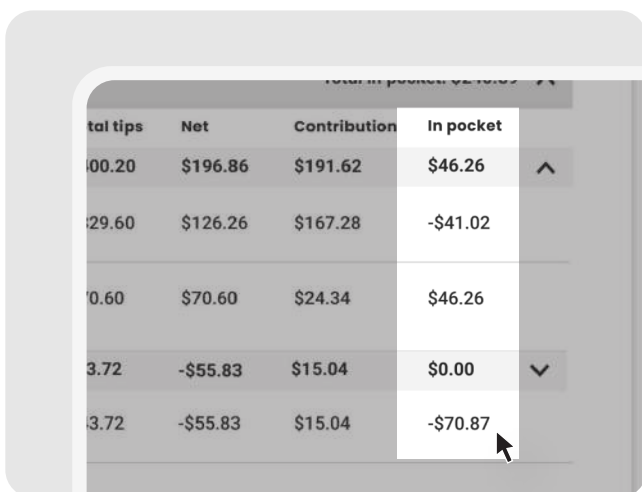
This enables automatically adjusts negative tip balances for staff members who have been overpaid.



19.2%	\$186,235.00	\$ 35,757.12	
18.3	\$82,796.54	\$ 4,551.81	
17.9	\$84,555.28	\$ 4,650.54	
Gratuities	Net sales	Contribution	Payout amount
18.3%	\$7,740.25	615.56	\$534.79
17.6%	\$5,169.25	\$406.70	\$362.78

9.1


You can only balance tips in the **daily payout** option. This is because it's usually to staff who have worked more than one shift in a day. To begin, click the pencil icon.



Total tips	Net	Contribution	In pocket
\$400.20	\$196.86	\$191.62	\$46.26
\$329.60	\$126.26	\$167.28	-\$41.02
\$70.60	\$70.60	\$24.34	\$46.26
\$43.72	-\$55.83	\$15.04	\$0.00
\$43.72	-\$55.83	\$15.04	-\$70.87

9.2

In the payout breakdown section for the **Day shift**, we can see that some staff have a negative payout balance.



Total in pocket: \$240.39						
	Gratuities	Net sales	Total tips	Net	Contribution	In pocket
Contributors	16.7%	\$2,395.25	\$400.20	\$196.86	\$191.62	\$46.26
	15.8%	\$2,091.00	\$329.60	\$126.26	\$167.28	-\$41.02
	23.2%	\$304.25	\$70.60	\$70.60	\$24.34	\$46.26
Contributors	16%	\$273.50	\$43.72	-\$55.83	\$15.04	\$0.00
	19%	\$273.50	\$43.72	-\$55.83	\$15.04	-\$70.87
Total payout amount:					\$ 240.39	
Unallocated amount:					\$ 0.00	

9.3

Erik earned **\$43.72** in tips but also received unrecorded cash, which caused his **Net** to be negative. When adding his **Net** and **Contribution**, he owes a total of **\$70.87** to the tip pool.

pool on Tuesday, March 09, 2023 for Night

Contributors

3 contributors

Total in pocket: \$344.94

	Gratuity	Net sales	Total tips	Net	Contribution	In pocket
Bartender: 2 contributors	17.8%	\$4,247.25	\$756.34	\$531.80	\$329.78	\$192.02
Alex Hall Bartender	16.3%	\$2,137.25	\$348.80	\$266.99	\$176.98	\$96.91
Shonda Charles Bartender	19.3%	\$2,110.00	\$407.54	\$264.81	\$168.80	\$96.01
Server: 1 contributors	19.5%	\$2,432.81	\$475.90	\$299.06	\$194.63	\$104.43
Erik Craig Bartender	19.5%	\$2,432.81	\$475.90	\$299.06	\$194.63	\$104.43

Total payout amount: \$ 296.45

Unallocated amount: \$ 0.00

9.4

For the Night shift, we can see Erik has a positive In pocket balance of \$104.43.

Share with

Contributors using the percentage system

Balance tips Modify tips Add direct tip-out View contributors

by Rules by Tip-out

	# of hours worked	\$ per hour	Tips
Server → Bar	19.5 hours	\$21.98	\$428.62
Bartender: 3 receivers	19.5 hours		

9.5

To correct negative balances at the end of the day, select “**Balance tips**”.

Note: This typically applies to employees who have worked more than one shift in a day.

Total tip pool payout amount: \$ 428.62

Unallocated pool: \$ 0.00

Unallocated amount: \$ 0.00

Server → Bar

Balance tips

Select a service and we will automatically deduct the owed amount from a contributor to balance out any tip discrepancies.

Service

Day

Cancel Submit

This rule is under a weekly service; you can view the full receiver list. For now, you can view what each contributor chipped in this rule as

9.6

This dropdown lets us select the other service we want to balance tips for. We're adjusting for the **Night shift**, so we want to balance it with the **Day shift**.

Balance tip updates

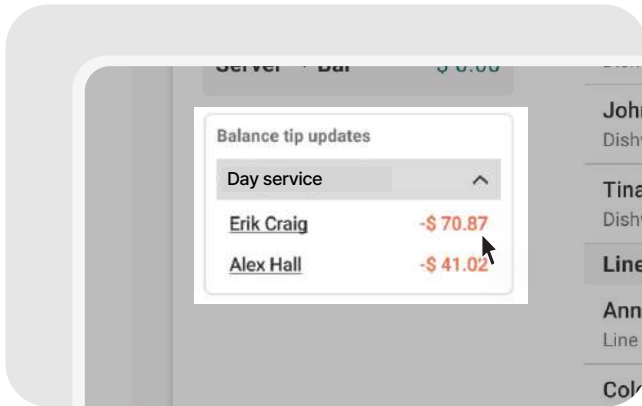
Day service

Erik Craig -\$ 70.87

Alex Hall -\$ 41.02

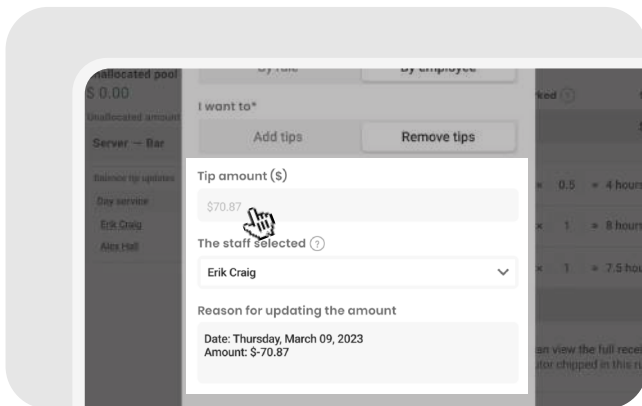
9.7

In the updates section, we can see we've adjusted the negative balance from the **Day shift**. Erik owed **\$70.87** from the Day shift, so that amount will be subtracted from his Night shift tips.



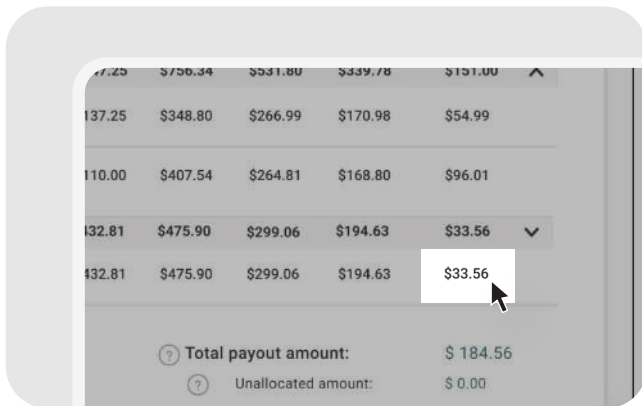
9.8

To see modified tip details, click on the name of the staff member.



9.9

We can see that \$70.87 was **removed** from Erik's tips from his Night shift, with an auto-generated note.



9.10

After balancing the tips, Erik now takes home **\$33.56** at the end of the day.

This is determine by:

Day tips (-\$70.87) + Night tips (\$104.43)
= \$33.56

Have questions? We're here for you.

Connect with us (yes, we're human too). Feel free to reach out to our Client Services team at clientservices@paidanyday.com

Email us