

# How to add and customize your auto gratuity and admin fees using the Sales Type option

## Overview

You can add and customize your auto gratuity and admin fee as unique line items on the sales screen and receipt using an admin fee and service charge products in Inventory and setting up for that in Options.

This will allow the receipts to list:

- Itemized receipt
- Subtotal
- % gratuity
- % admin fee
- % state sales tax
- Grand total

## Quick steps overview

1. [Create an inventory item for the service charge.](#)
2. [Set the Auto Gratuity.](#)
3. [Add the inventory item to the sales type for the service and administrative charges.](#)
4. [Sell the item using the Sales Type containing these new additional changes.](#)

## To create a new inventory for the service charge

1. Go to **Inventory**.
2. Click **New Product** to add a new charge item, for example, ADMINCHARGE.

***Note:** Make sure Track Inventory is set to No.*

| Products  | Products by Supplier  | Suppliers | Sales Rep | Purchase Orders | Gift Card             | Rain Check            | Packages      | Modifier Setup | Range Servant | PO Builder Wizard   |  |  |  |  |  |  |  |  |
|---|-----------------------|-----------|-----------|-----------------|-----------------------|-----------------------|---------------|----------------|---------------|---------------------|--|--|--|--|--|--|--|--|
| <b>Search &amp; Product List</b><br>Product: <input type="text" value="service"/> <input type="button" value="Go"/><br>Supplier: <input type="text" value="[All]"/> Category: <input type="text" value="[All]"/><br><input type="checkbox"/> Sort by age <input checked="" type="radio"/> Asc <input type="radio"/> Desc <input type="button" value="Show All"/><br><input type="checkbox"/> Show Discontinued Items<br><input type="checkbox"/> Exclude Not In Stock 0 - 3 of 3 items<br><table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Service chg (Taxab...</td> <td>Service chg (Taxable)</td> </tr> <tr> <td>SERVICECHARGE</td> <td>Gratuity</td> </tr> <tr> <td>ccfood5</td> <td>service fee/inhouse</td> </tr> </tbody> </table> |                       |           | Code      | Description     | Service chg (Taxab... | Service chg (Taxable) | SERVICECHARGE | Gratuity       | ccfood5       | service fee/inhouse | <b>Product Information</b><br>Product Setup   Order Info   Online   Tier Price   Advanced   Other   Item Modifiers   Notes<br>Item Type: <input type="text" value="Service Charge"/><br>Supplier: <input type="text" value="TEXAS STAR"/> <input type="button" value="..."/><br>Category: <input type="text" value="Service Charge"/><br>Season Code: <input type="text"/><br>Product Code: <input type="text" value="Service chg (Taxable)"/> <input type="button" value="Change Code"/><br>Description: <input type="text" value="Service chg (Taxable)"/><br>Catalog Cost: <input type="text" value="\$0.00"/><br>Tax Code: <input type="text" value="TEST"/> Catalog #: <input type="text"/><br><input type="checkbox"/> Tax Inclusive Price: <input type="text"/><br>Retail Price: <input type="text" value="\$0.00"/> Profit Margin: <input type="text" value="0.00%"/> ROI: <input type="text" value="0.00%"/><br>Suggested Price: <input type="text" value="0.00"/> Online Price: <input type="text" value="0.00"/><br>Track Inventory: <input type="text" value="No"/> <input type="checkbox"/> Zero Price B Price B: <input type="text" value="0.00"/> <input type="checkbox"/> Zero Price C Price C: <input type="text" value="0.00"/><br><input type="button" value="More Price"/> |  |  |  |  |  |  |  |
| Code  | Description           |           |           |                 |                       |                       |               |                |               |                     |  |  |  |  |  |  |  |  |
| Service chg (Taxab...   | Service chg (Taxable) |           |           |                 |                       |                       |               |                |               |                     |  |  |  |  |  |  |  |  |
| SERVICECHARGE   | Gratuity              |           |           |                 |                       |                       |               |                |               |                     |  |  |  |  |  |  |  |  |
| ccfood5   | service fee/inhouse   |           |           |                 |                       |                       |               |                |               |                     |  |  |  |  |  |  |  |  |

3. Select **Admin Charge** from the Item Type drop-down field.
4. Select **Save** below.
5. Next, repeat steps 2-4 above to add the service charge, for example, **Service Charge (Taxable)**, except select **Service Charge** from the **Item Type** drop-down field.

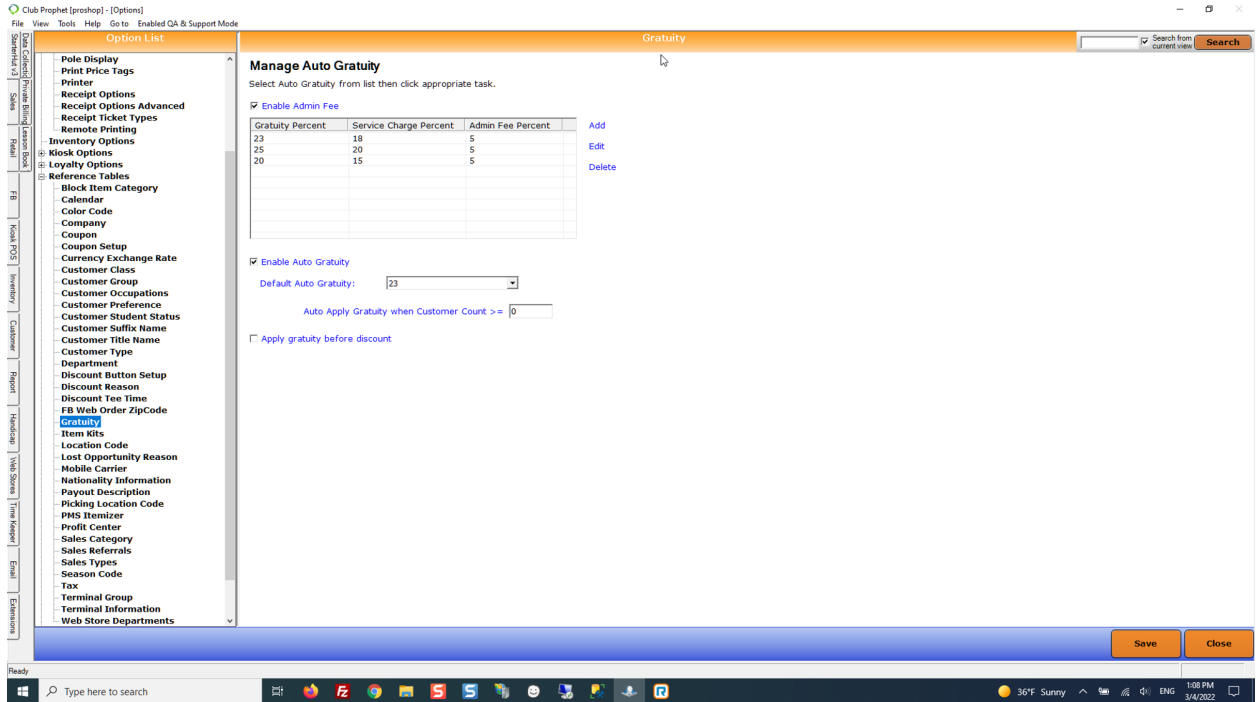
*Note: Both the Admin Charge and the Service Charge are hardcoded into the software.*

6. Select **Save** at the bottom of the screen.

*Note: Neither one of these charges needs a Retail Price since the charge is pulled from the Auto Gratuity set in the next section.*

## To set Auto Gratuity

1. Go to **Tools | Options | Reference Tables | Gratuity**. The Manage Auto Gratuity screen displays to the right.



2. Select the **Enable Admin Fee** checkbox.
3. Click **Add**. The Gratuity screen displays.

4. Enter the desired numbers as follows keeping in mind this hardcoded formula: Service Charge Percent field + Admin Fee Percent = (totals to be) the Gratuity Percent field.
  - a. Skip the **Gratuity Percent** field because it will be filled in based on the totals of the next two fields.
  - b. A percentage for the **Service Charge Percent** field.
  - c. A percentage for the **Admin Fee Percent** field. The Gratuity Percent field displays the total of the **Service Charge** and the **Admin Fee Percent** fields
5. Click **Save**.
6. Select the **Enable Auto Gratuity** checkbox.
7. Select the gratuity you want to default to from the **Default Auto Gratuity** drop-down.
8. If you want to apply this gratuity for a certain amount of customers, enter that number in the **Auto Apply Gratuity when Customer Count is =>** field.

9. Check the **Apply gratuity before discount** box if desired.
10. Select the **Save** button in the lower right corner of the screen.

## To set up for the fees and service charge in Sale Type

1. Go to **Tools | Options** [or press **F2**] if need be.
2. Select **Reference Table | Sales Types**. The Sales Type screen displays to the right.
3. Create a new Sales Type [See the help topic: [To set up the Sales Type in CPS](#)] or double-click one listed in the Sales Type table. The Edit Sales Type screen displays.
4. Select the **Service Charge/Gratuity by Sale Type** checkbox to trigger the Admin fees and Service charge in the next two steps.
5. In the Select Service Charge/Gratuity by Sale Type section, enter the inventory item exactly as the product code was set up in Inventory that you created into the Product Code field (see the above steps).
6. In the Select Admin Charge/Gratuity by Sale Type section, enter the into Product Code field, the product code.

***Note:** The percentages for the above are set in the Options | Reference Table | Gratuity. See step 4 above in the section above: [To set Auto Gratuity](#).*


7. Select **Update** at the bottom of this screen.
8. Select **Save** in the lower-right corner of the screen.

***Note:** To make sure your Sales Type button is visible on the Sales screen, go here in Options [F2]: **Sales Options | Sales | Buttons Visible Options | Show Sales Type** near the bottom of this section. Then select Save and Close.*

***BEST PRACTICE:** Shut down and restart the software.*

## To sell the item using the Sales Type containing the additional changes

1. Go to the Sales module.
2. Look up the products and add them to your sale.
3. At the bottom of the screen, select the Sale Type button. The label changes. If there is more than one Sale Type, continue to click the Sale Type button until you see the button labeled as the one you need to be able to charge the extra service charges. The extra charges will be listed in the sale.

Sold To: A Cash Account 

| Qty | Item                        | Price |
|-----|-----------------------------|-------|
| 1   | Fuller House Rita           | 5.00  |
| 1   | Margarita Rocks             | 6.00  |
| 1   | Service chg (Taxable) (18%) | 1.98  |
| 1   | Admin Charge (5%)           | 0.55  |

Sale

Return

Payout

Gift Card

BEVERAGES

SOUP/SALAD

BURGERS/SANDWICHES

ENTREES

KIDS

SIDES

DESERTS

START HOURS

BEER

WINE

LIQUOR

SPECIALTY DRINKS

BREAKFAST

APPETIZER

SPECIALS

CONFERENCE

Seat

Course

Hold

Fire

Fire All

Modifier

Edit Modifier

Special Notes

Fuller House Rita

bloody mary

cape cod

Hill Country Lemonade

Baileys Coffee

Chocolate Butterscotch

Margarita Rocks

Brunch Bloody mary

Cosmo

Hill Country Strawberry

Almond Mocha

Cafe Italiano

Top Shelf Margarita

Mimosa

long Is Tea

Martini

Butterscotch Bomb

Irish Kiss

Star Margarita

Brunch Mimosa

Screwdriver

Multi Alcohol

Texas Star Coffee

Mid Cities Silver Rita

marg special

White Russian

\$2.50 Margarita

Butterscotch Ice Cream

Star Grande Rita

El Jefe

Mango Margarita

Double Trouble

| Qty       | Batch Discount | Gratuity (23%) | Delete Item | Clear Sale |
|-----------|----------------|----------------|-------------|------------|
| Sub Total | \$13.53        | Tips           | \$0.00      |            |
| Tax       | \$0.30         | Tendered       | \$0.00      |            |
| Total     | \$13.83        | Payments       | \$0.00      |            |

Amount Due **\$13.83**

Save Tab

Discard Tab

Tax Exempt

Tips

Char a Tips

Sale Type: Banquets

F-Order

Label

Coupon

Call Number

Multiple Discount

Example printed receipt

**TEST GLOBAL Header**

Test smaller font GLOBAL

**Sales: 10642203040001**

Receipt - 3/4/2022 11:58:00 AM

**Cashier: andym**

**Sold To: A CASH ACCOUNT**

Item

-----

|                       |        |
|-----------------------|--------|
| 1 - Fuller House Rita | \$5.00 |
|-----------------------|--------|

|                     |        |
|---------------------|--------|
| 1 - Margarita Rocks | \$6.00 |
|---------------------|--------|

|           |         |
|-----------|---------|
| Subtotal: | \$11.00 |
|-----------|---------|

|               |        |
|---------------|--------|
| 18% Club Fee: | \$1.98 |
|---------------|--------|

|                  |        |
|------------------|--------|
| 5% Admin Charge: | \$0.55 |
|------------------|--------|

|          |        |
|----------|--------|
| Test One | \$0.12 |
|----------|--------|

|          |        |
|----------|--------|
| Test Two | \$0.10 |
|----------|--------|

|            |        |
|------------|--------|
| Test Three | \$0.08 |
|------------|--------|

|               |                |
|---------------|----------------|
| <b>Total:</b> | <b>\$13.83</b> |
|---------------|----------------|

|               |        |
|---------------|--------|
| Amt Tendered: | \$0.00 |
|---------------|--------|

|         |        |
|---------|--------|
| Change: | \$0.00 |
|---------|--------|

Paid \$13.83 Cash

Test Footer (Terminal)