



**MBR Management Corp.**

# **Compensation Deferment Driver Checkout Changes**

**August 2020**

Watch the Video

[https://www.youtube.com/watch?v=9KD\\_WYmHa38](https://www.youtube.com/watch?v=9KD_WYmHa38)



# DCO Screen Changes

The screenshot displays the 'Team Member Checkout' window. At the top, there is a navigation bar with icons for Close, Orders, Cash Drops, Counts, Coupons, Manager, Reassign, Print, Time Clock, Shift (up), and Shift (down). Below this, the 'Shift Reconciliation' tab is active, showing a shift for 5/1/2020 from 9:30 AM to 3:45 PM, with 10.88 hours this week and \$0.00 in cash tips. A 'Checkout' button is visible. The main area is divided into two sections: 'Shift Reconciliation' on the left and 'Summary' on the right. The 'Shift Reconciliation' section lists various items with their amounts, including 'Electronic Tips' (\$40.78) and 'Cash Reimbursed Now' (\$0.00). The 'Summary' section shows a total reimbursement of \$26.46 and deferred tips amount of \$26.46. Red boxes and numbers 1, 2, and 3 highlight specific areas: 1 points to 'Electronic Tips', 2 points to 'Cash Reimbursed Now', and 3 points to the 'Total Reimbursement' and 'Deferred Tips Amount' in the summary.

Shift Reconciliation	
Bank/Till	\$20.00
Order Total	\$223.63 +
Prepaid Amounts	\$0.00 -
Electronic Payments	\$264.41 -
1 Electronic Tips	\$40.78 +
Cash Drops	\$0.00 -
Amount to Collect	\$20.00 =
Collected	\$0.00 +
Over/Even/Under	-\$20.00 =
Mileage Total	\$5.68
Device Total	\$0.00
2 Cash Reimbursed Now	\$0.00

Summary	
Orders	4
Delivery Orders	4
Cash Drops	0
Credit Cards	4
Trade Receivables	0
Gift Cards	0
Checks	0
Total Reimbursement	\$26.46
Deferred Tips Amount	\$26.46
Deferred Mileage Amount	\$0.00

1 - Electronic Tips (Credit Card and Gift Card) added back into Shift Reconciliation for proper deferment.

2 - This button is used to override the deferment of tips and/or mileage

3 - Reimbursement/Deferment Summary section

# DCO - Collected Amount

The screenshot displays the 'Team Member Checkout' window. At the top, there is a toolbar with icons for Close, Orders, Cash Drops, Counts, Coupons, Manager, Reassign, Print, Time Clock, and Shift (up and down arrows). Below the toolbar, the 'Shift Reconciliation' tab is active, showing 'Shift 1 of 1'. The main area contains input fields for Time In (5/1/2020 9:30 AM), Time Out, Hours, and Checkout Time. To the right, it shows Hours This Day (3.45), Hours This Week (10.88), and Cash Tips (\$0.00). A 'Checkout' button is also present. Below this, there are two summary tables. The left table, titled 'Shift Reconciliation', lists various financial items with their amounts and signs. The right table, titled 'Summary', lists items like Orders, Delivery Orders, Cash Drops, Credit Cards, Trade Receivables, Gift Cards, and Checks, along with their counts. At the bottom of the summary table, 'Total Reimbursement' is \$26.46, 'Deferred Tips Amount' is \$26.46, and 'Deferred Mileage Amount' is \$0.00. A red box highlights the 'Deferred Tips Amount' and 'Deferred Mileage Amount' rows.

Shift Reconciliation	
Bank/Till	\$20.00
Order Total	\$223.63 +
Prepaid Amounts	\$0.00 -
Electronic Payments	\$264.41 -
Electronic Tips	\$40.78 +
Cash Drops	\$0.00 -
Amount to Collect	\$20.00 =
Collected	\$0.00 +
Over/Even/Under	-\$20.00 =
Mileage Total	\$5.68
Device Total	\$0.00
Cash Reimbursed Now	\$0.00

Summary	
Orders	4
Delivery Orders	4
Cash Drops	0
Credit Cards	4
Trade Receivables	0
Gift Cards	0
Checks	0
Total Reimbursement	\$26.46
Deferred Tips Amount	\$26.46
Deferred Mileage Amount	\$0.00

Biggest Change: You **MUST** tell Pulse you collected money from the driver.

In the example above, the driver is owed \$40.78 in Electronic Tips and \$5.68 in Mileage, yet Pulse is only deferring \$26.46 in tips and \$0.00 in Mileage. This is because the driver still owes the store \$20.00. Pulse has deducted this \$20.00 first from Deferred Mileage and secondly from Deferred Tips.

# DCO - Proper Deferment

The screenshot displays the 'Team Member Checkout' application window. The title bar reads 'Team Member Checkout'. Below the title bar is a toolbar with icons for Close, Orders, Cash Drops, Counts, Coupons, Manager, Reassign, Print, Time Clock, Shift (up arrow), and Shift (down arrow). The main interface is divided into several sections:

- Shift Reconciliation**: Shows 'Shift 1 of 1'. Fields include Time In (5/1/2020 9:30 AM), Time Out, Hours, Checkout Time, Hours This Day (3.47), Hours This Week (10.90), and Cash Tips (\$0.00). A 'Checkout' button is present.
- Shift Reconciliation**: A detailed list of transactions:
  - Bank/Till: \$20.00
  - Order Total: \$223.63 +
  - Prepaid Amounts: \$0.00 -
  - Electronic Payments: \$264.41 -
  - Electronic Tips: \$40.78 +
  - Cash Drops: \$0.00 -
  - Amount to Collect: \$20.00 =
  - Collected: \$20.00 +
  - Over/Even/Under: \$0.00
  - Mileage Total: \$5.68
  - Device Total: \$0.00
  - Cash Reimbursed Now: \$0.00
- Summary**: A table showing counts and amounts for various categories:
  - Orders: 4
  - Delivery Orders: 4
  - Cash Drops: 0
  - Credit Cards: 4
  - Trade Receivables: 0
  - Gift Cards: 0
  - Checks: 0
  - Total Reimbursement: \$46.46
  - Deferred Tips Amount: \$40.78
  - Deferred Mileage Amount: \$5.68

After telling Pulse you have collected the money owed, the Deferred Tips and Deferred Mileage numbers are reflected correctly.

**NEVER** leave an Over/Even/Under number negative unless the driver really didn't have enough money to give you. Doing so will result in a reduction of Deferred Tips and/or Mileage.

# DCO - Overriding Deferment

The screenshot displays the 'Team Member Checkout' software interface. At the top, there is a toolbar with icons for Close, Orders, Cash Drops, Counts, Coupons, Manager, Reassign, Print, Time Clock, and Shift. Below the toolbar, the main window is titled 'Shift Reconciliation' and shows details for 'Shift 1 of 1' on 5/1/2020. The interface includes fields for Time In (9:30 AM), Time Out, Hours, and Checkout Time. It also displays 'Hours This Day' (3.52) and 'Hours This Week' (10.95). A 'Cash Tips' field is set to \$0.00. A 'Checkout' button is visible. The main area is divided into two sections: 'Shift Reconciliation' on the left and 'Summary' on the right. The 'Shift Reconciliation' section shows a list of items with their respective amounts, including Bank/Till (\$20.00), Order Total (\$223.63), Prepaid Amounts (\$0.00), Electronic Payments (\$264.41), Electronic Tips (\$40.78), Cash Drops (\$0.00), and Amount to Collect (\$20.00). It also shows 'Collected' (\$20.00) and 'Over/Even/Under' (\$0.00). The 'Summary' section shows a list of items with their respective amounts, including Orders (4), Delivery Orders (4), Cash Drops (0), Credit Cards (4), Trade Receivables (0), Gift Cards (0), and Checks (0). It also shows 'Total Reimbursement' (\$46.46), 'Deferred Tips Amount' (\$40.78), and 'Deferred Mileage Amount' (\$5.68). A 'Cash Reimbursed Now' dialog box is open in the foreground, with a red arrow pointing to it. The dialog box has a title bar and a close button. It contains two input fields: 'Applied to Electronic Tips' with a value of \$10.00 and 'Applied to Mileage Total' with a value of \$5.68. There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

Shift Reconciliation	
Bank/Till	\$20.00
Order Total	\$223.63 +
Prepaid Amounts	\$0.00 -
Electronic Payments	\$264.41 -
Electronic Tips	\$40.78 +
Cash Drops	\$0.00 -
Amount to Collect	\$20.00 =
Collected	\$20.00 +
Over/Even/Under	\$0.00 =
Mileage Total	\$5.68
Device Total	\$0.00
Cash Reimbursed Now	\$0.00

Summary	
Orders	4
Delivery Orders	4
Cash Drops	0
Credit Cards	4
Trade Receivables	0
Gift Cards	0
Checks	0
Total Reimbursement	\$46.46
Deferred Tips Amount	\$40.78
Deferred Mileage Amount	\$5.68

The Cash Reimbursed Now button allows you to override the deferment of tips and/or mileage. Simply click the button and enter the amounts you wish to override. You can override any amount up to the amount owed for each category. You can even do partial overrides.

# DCO - Overriding Deferment

**Team Member Checkout**

Close Orders Cash Drops Counts Coupons Manager Reassign Print Time Clock Shift Shift

**Shift Reconciliation** Delivery Reimbursement Important Dates Compensation

Shift 1 of 1

Time In **5/1/2020 9:30 AM**  
Time Out  
Hours  
Checkout Time

Hours This Day **3.53**  
Hours This Week **10.96**  
Cash Tips **\$0.00**

Checkout

**Shift Reconciliation**

Bank/Till	\$20.00
Order Total	\$223.63 +
Prepaid Amounts	\$0.00 -
Electronic Payments	\$264.41 -
Electronic Tips	\$40.78 +
Cash Drops	\$0.00 -
Amount to Collect	\$20.00 =
Collected	\$20.00 +
Over/Even/Under	\$0.00 =
Mileage Total	\$5.68
Device Total	\$0.00
Cash Reimbursed Now	\$15.68

**Summary** Credit Cards Checks Coupons

Orders	4
Delivery Orders	4
Cash Drops	0
Credit Cards	4
Trade Receivables	0
Gift Cards	0
Checks	0
Total Reimbursement	\$46.46
Deferred Tips Amount	\$30.78
Deferred Mileage Amount	\$0.00

This is the resulting screen for the previous example. Here we have told the system we are paying \$5.68 in mileage now and an additional \$10.00 in electronic tips. The result is a Mileage Deferment of \$0.00 and a Electronic Tip Deferment of \$30.78.

# DCO - Final Thoughts

The screenshot displays the 'Team Member Checkout' software interface. At the top, there is a toolbar with icons for Close, Orders, Cash Drops, Counts, Coupons, Manager, Reassign, Print, Time Clock, and Shift (up and down arrows). Below the toolbar, the main window is divided into several sections:

- Shift Reconciliation**: Shows Time In (5/1/2020 9:30 AM), Time Out, Hours, and Checkout Time. It also displays Hours This Day (3.47), Hours This Week (10.90), and Cash Tips (\$0.00).
- Summary**: A table showing various transaction types and their counts: Orders (4), Delivery Orders (4), Cash Drops (0), Credit Cards (4), Trade Receivables (0), Gift Cards (0), and Checks (0). It also shows Total Reimbursement (\$46.46), Deferred Tips Amount (\$40.78), and Deferred Mileage Amount (\$5.68).
- Reconciliation Table**: A table listing various items and their amounts, with some values highlighted in red boxes:

Item	Amount
Bank/Till	\$20.00
Order Total	\$223.63 +
Prepaid Amounts	\$0.00 -
Electronic Payments	\$264.41 -
Electronic Tips	\$40.78 +
Cash Drops	\$0.00 -
Amount to Collect	\$20.00 =
Collected	\$20.00 +
Over/Even/Under	\$0.00
Mileage Total	\$5.68
Device Total	\$0.00
Cash Reimbursed Now	\$0.00

The Driver Checkout procedure changes are not major, but they do require attention. If you always follow these steps, you should have no issues:

1. Correctly record that you have collected money from the driver
2. Ensure Deferred Tips amount equals Electronic Tips amount
3. Ensure Deferred Mileage amount equals Mileage Total