



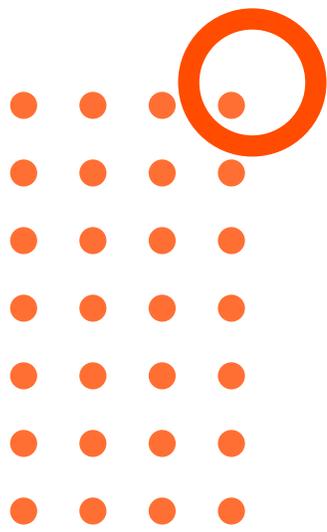
Online Ordering

ADVANCED SETTINGS GUIDE



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Introduction

Toast Online Ordering enables you to customize the look and settings of your online ordering site to build an engaging guest experience. This guide provides steps and Toast Tips on how to enhance your Toast Online Ordering website to maximize efficiency and engagement with your guests through online ordering.

Throttling Online Orders

Toast knows a day in the restaurant life is never the same and sometimes you experience surprise rushes or things get crazy during peak business hours. In these instances, you can use Toast's Throttling Tool to disable or put a hold on (snooze) orders coming in from your online ordering site.

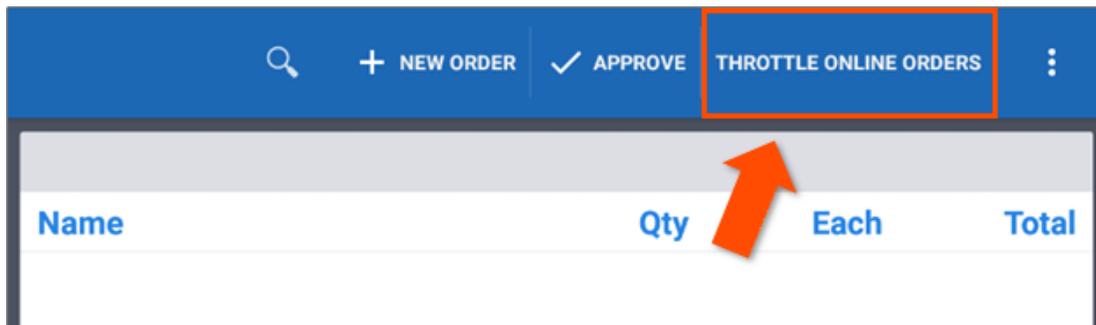
There are two ways to enable order throttling in Toast. Follow the steps below to enable order throttling from a device and from Toast's back-end.

Enable Throttling From a Device

1. From the **Main Menu Dashboard**, navigate to the *Pending Orders* screen.

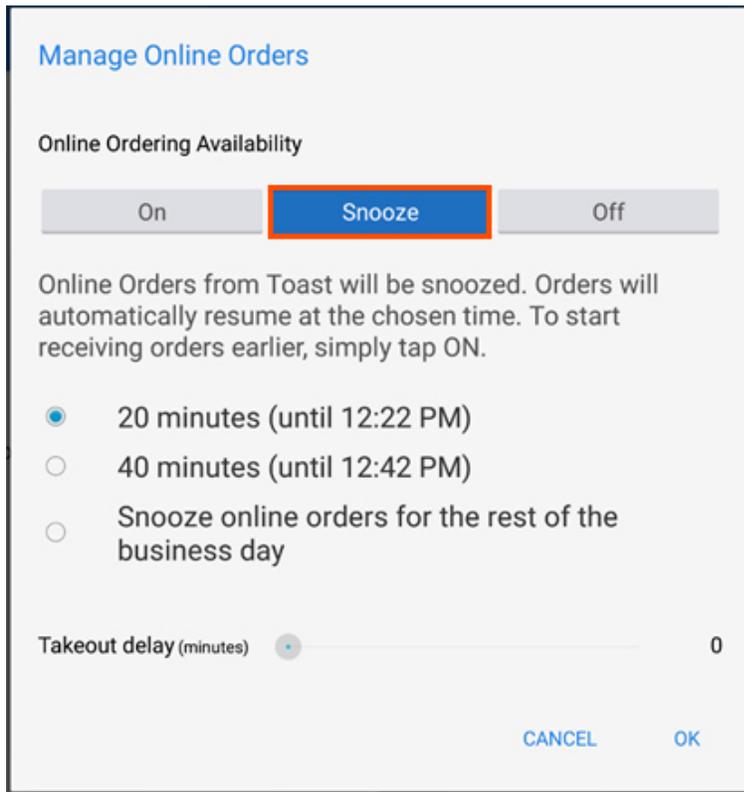


2. Select *Throttle Online Orders* in the upper right corner.



3. From here, select *On*, *Snooze* or *Off* to manage **Online Ordering Availability**.

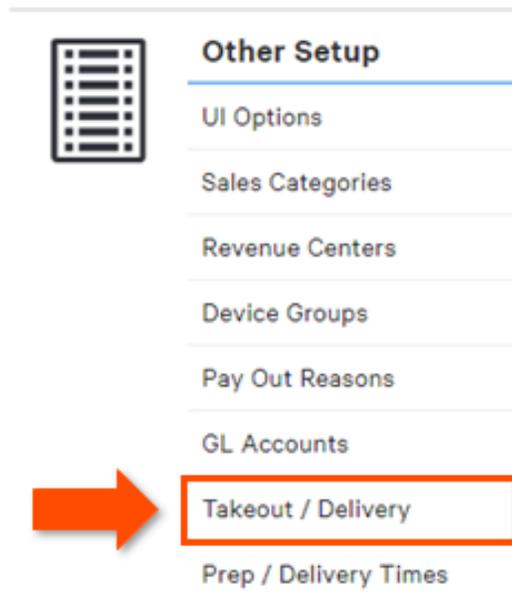




4. Select *OK*.

Enable Throttling from Toast's Back-End

1. In the Toast back-end, navigate to the **Other Setup** header and select *Takeout / Delivery*.



2. Navigate to the *Online Order Throttling* header. Select *On* and enter the Takeout order delay or Delivery order delay times.



Online Order Throttling

Add throttle delays to increase the quote time for orders when your restaurant gets busy. Must be an increment of 5 minutes.

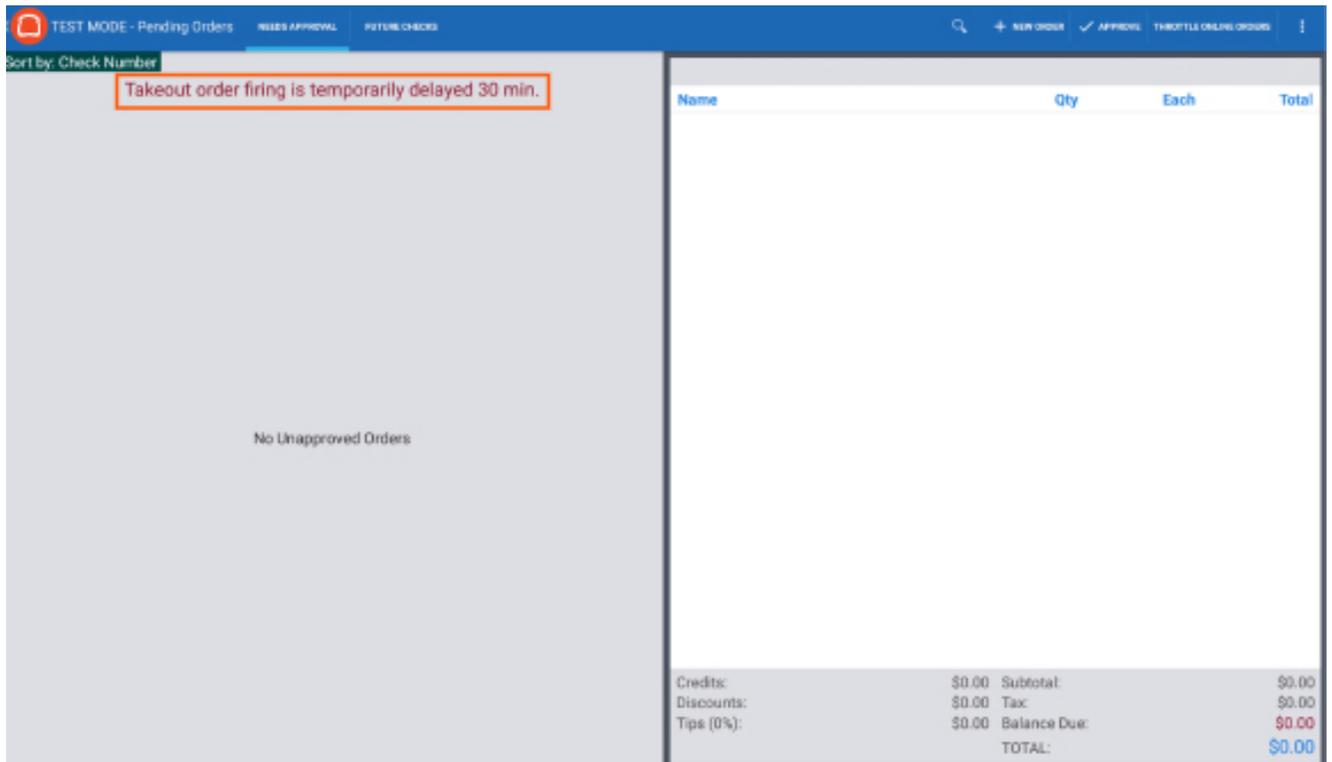
Throttle Orders On 
 Off

Takeout order delay minutes
Takeout orders will have a default quote time of **15 minutes**.

Delivery order delay minutes
Delivery orders will have a default quote time of **45 minutes**.

- When finished, select **Save** and **Publish Now** to finalize your changes.

What the Kitchen Sees



The screenshot shows a kitchen interface with a blue header. The header includes 'TEST MODE - Pending Orders', 'NEEDS APPROVAL', and 'PENDING CHECKS'. On the right, there are icons for '+ NEW ORDER', 'APPROVE', 'THROTTLE ONLINE ORDERS', and a menu icon. The main area is split into two panels. The left panel is grey and contains the text 'No Unapproved Orders'. A red-bordered box highlights a message: 'Takeout order firing is temporarily delayed 30 min.'. The right panel is white and contains a table with columns 'Name', 'Qty', 'Each', and 'Total'. At the bottom right, there is a summary table:

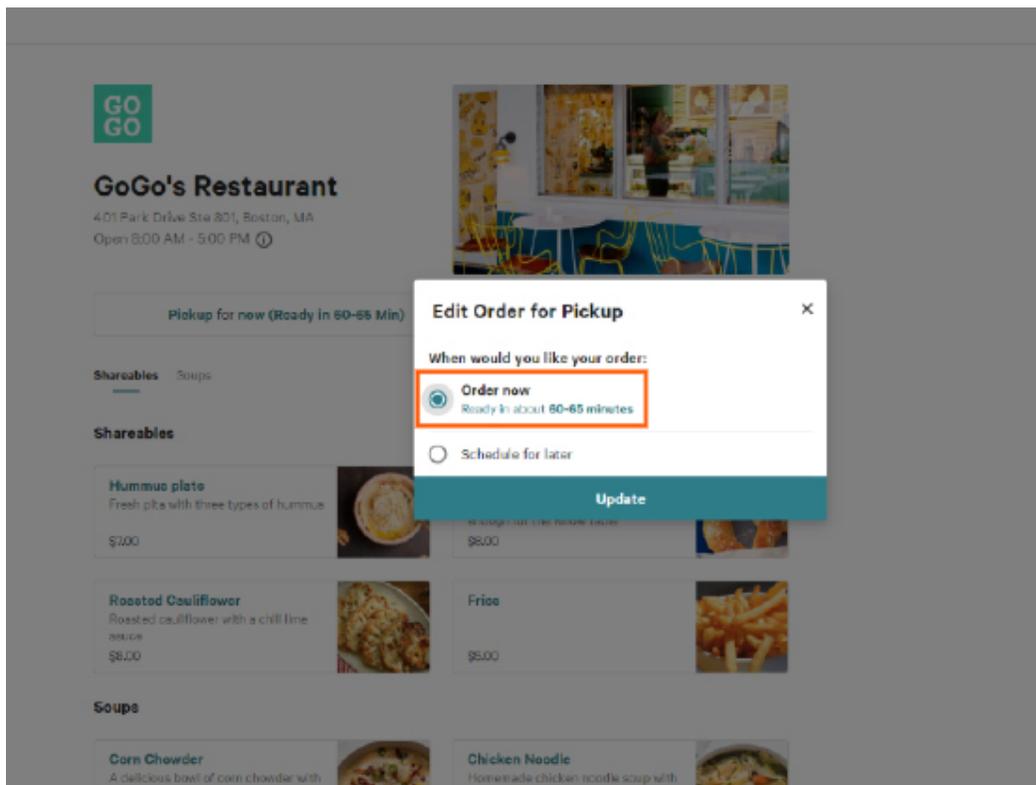
Name	Qty	Each	Total
Credits:		\$0.00	Subtotal \$0.00
Discounts:		\$0.00	Tax \$0.00
Tips (0%):		\$0.00	Balance Due: \$0.00
TOTAL:			\$0.00

What your Guests will See

Guests will see the first available time moved out to account for throttling. They won't see anything to indicate that throttling is in effect, or that the "restaurant is busy."

This is the guest screen with the first available time:





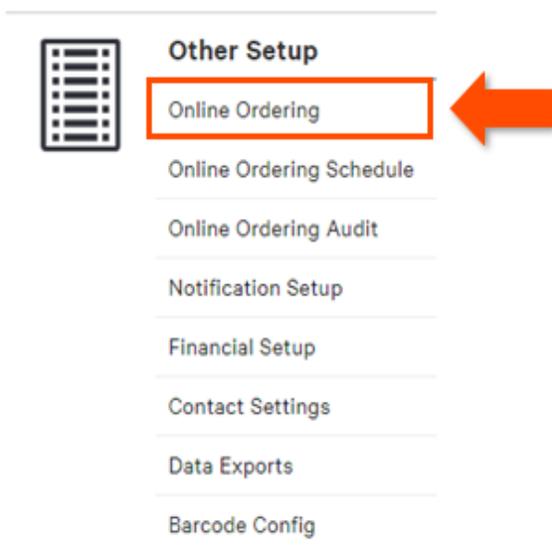
Placing Future Orders

If you would like to offer the ability for your guests to schedule orders for a future time or date, you will need to enable future order scheduling in Toast's back-end. This can be a great tool for guests who like to plan ahead and schedule a pick-up order for lunch or a breakfast sandwich the night before a busy workday.

When this feature is turned on, all future orders placed will fire to the kitchen using the designated prep time before the order's scheduled pick-up. For example, if an order is scheduled for 12:00pm and requires 30 minutes of prep, the order will fire to the kitchen at 11:30am.

To enable future order scheduling:

1. Navigate to the [Online Ordering](#) section under the **Other Setup** header in the Toast back-end.



- From here, locate the **Online Ordering Scheduling Settings** header and select *Yes, guests may schedule orders*. By default, your guests will be able to order ahead by 14 days.

Online Ordering Scheduling Settings

Enable Scheduling Controls whether guests can schedule orders online. For example, a guest may create an order at 4am that is to be delivered at 12 noon. An Order Auto-Firing device is required if enabled.

- Yes, guests may schedule orders
- No, all orders will be fulfilled as soon as possible

- A customized limit can be set by selecting the **Custom Date Range** option and entering the number of days you'd like your guests to be able to schedule orders out. For example, if you'd like to allow your guests to schedule orders up to a month in advance, you would enter 30 in the blank field.

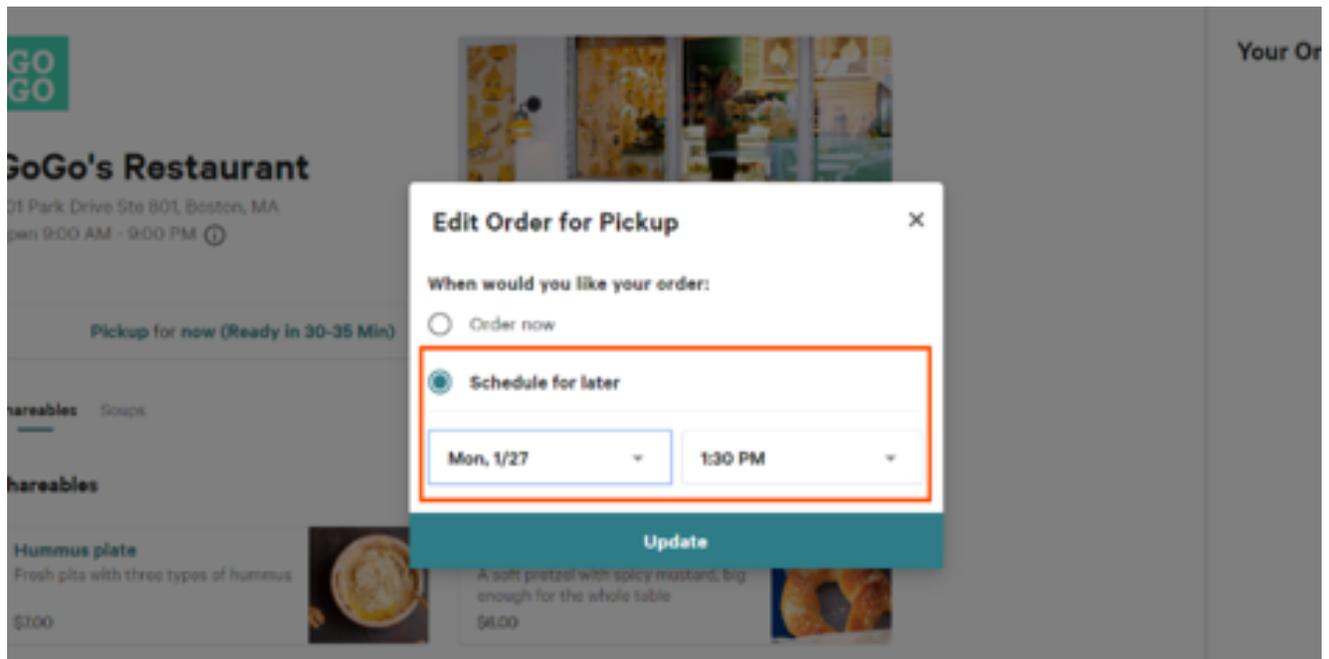
Max Future Scheduled Order Date (days) Allow guests to order ahead by either 14 days (default) or further out in the calendar year.

- Default Date Range
- Custom Date Range

30

This only affects online orders and is separate from your Max Future Scheduled Order Date set for POS, which is set to 365 days. View your [POS Scheduling Settings](#).

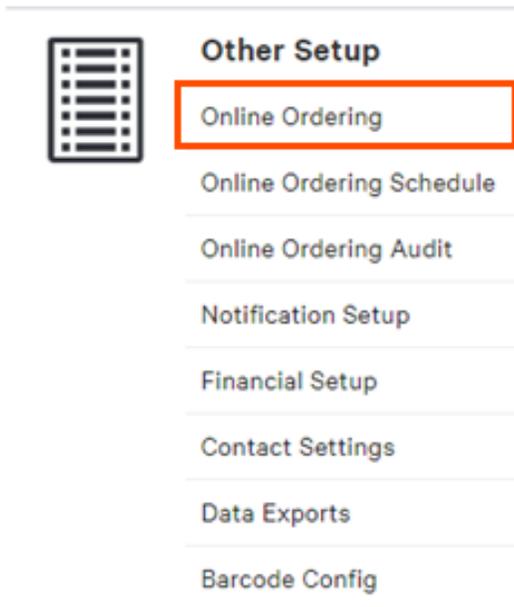
- After saving and publishing your changes, your guests will have the option to select **Schedule for Later** and choose the order date and time from the dropdown right on your Toast Online Ordering website.



Setting a Minimum Lead Time

This tool allows you to set the limit on how soon your restaurant will accept an online order. This feature is intended for restaurants who use Toast's Online Ordering for catering. For example, let's say your restaurant set the Delivery Minimum Lead Time to 6 hours. If a guest wants a delivery order at 4:00pm, the earliest they can place that order is 10:00am.

1. Navigate to the **Online Ordering** section under the **Other Setup** header in the Toast back-end.



2. Here, you can enter your desired lead time settings for online takeout orders in the text field for **Takeout Minimum Lead Time (hours)** and enter your desired lead time hours for online delivery in the text field for **Delivery Minimum Lead Time (hours)**.

Minimum Lead Time Settings

Takeout Minimum Lead Time (hours)	<input type="text" value="6"/>	Explicitly limit how soon you will accept a takeout order, in hours.
Delivery Minimum Lead Time (hours)	<input type="text" value="6"/>	Explicitly limit how soon you will accept a delivery order, in hours.

3. When finished, select **Save** and **Publish Now** to finalize your changes.

If **Prep Times** are set up, then they will be factored in when calculating first available Fulfillment Times. Fulfillment Time is the calculated time that the kitchen will fulfill (complete) a particular order.

For example, let's say the Takeout Minimum Lead Time for your restaurant is 6 hours, the order has a 30 minute Prep Time, and the restaurant opens at 9:00am. To calculate the Fulfillment Time, we'll add the Minimum Lead Time and the Prep Time, 6 hours + 30 minutes, resulting in the Fulfillment Time of 3:30pm. However, if the restaurant is closed then the order would automatically bump the fulfillment time to the next day.

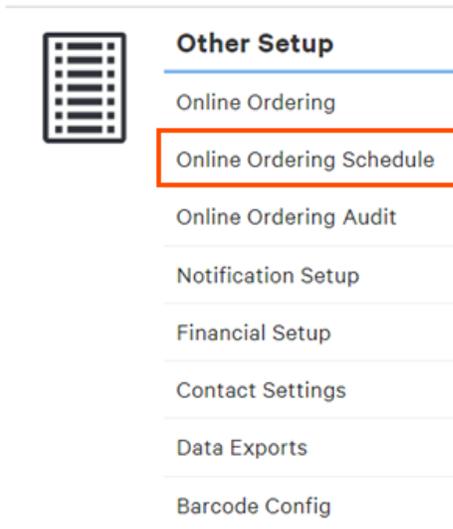


Adding a Schedule Override

When the restaurant is closed, it's important to deactivate online ordering for customers. In anticipation of holidays, scheduled maintenance or event rentals, you can schedule an online ordering "override" to temporarily disable online ordering for a specified amount of time.

To schedule an override:

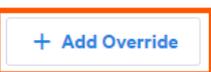
1. Navigate to the **Online Ordering Schedule** section under the **Other Setup** header of the Toast back-end.



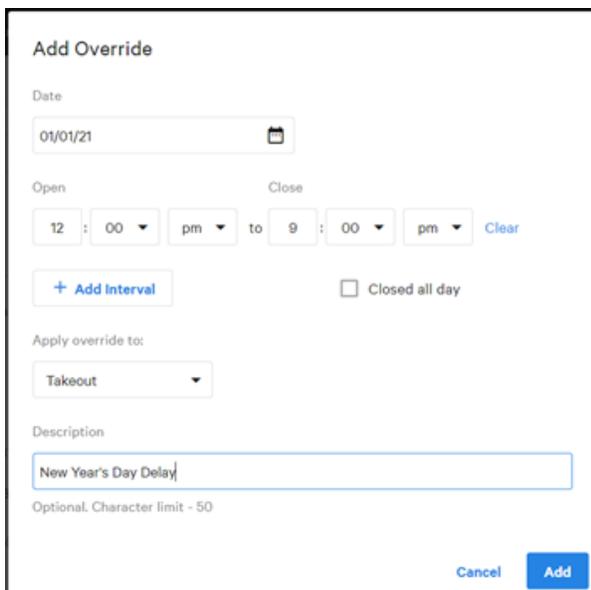
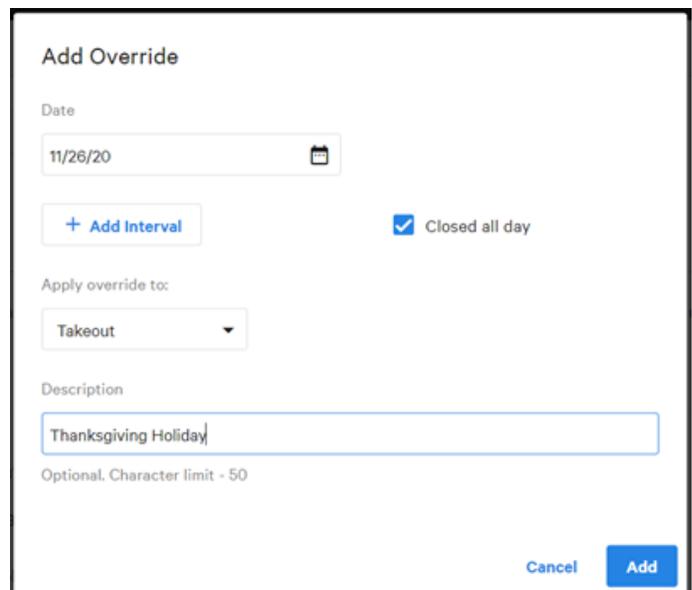
2. Under the **Schedule Overrides** header, select **+ Add Override**.

Schedule Overrides

Customize your hours on specific days for takeout and/or delivery. This will only affect online ordering. Hours must be in increments of 15 minutes.



3. Using the **Date** picker, select the day you wish to add an override to. Then, enter the alternative online ordering hours or select the checkbox next to **Closed all day**.

A screenshot of the 'Add Override' form. The 'Date' field is set to 01/01/21. The 'Open' time is 12:00 pm and the 'Close' time is 9:00 pm. The 'Apply override to' dropdown is set to 'Takeout'. The 'Description' field contains 'New Year's Day Delay'. There is a checkbox for 'Closed all day' which is unchecked. The 'Add Interval' button is visible. At the bottom, there are 'Cancel' and 'Add' buttons.A screenshot of the 'Add Override' form. The 'Date' field is set to 11/26/20. The 'Apply override to' dropdown is set to 'Takeout'. The 'Description' field contains 'Thanksgiving Holiday'. The 'Closed all day' checkbox is checked. The 'Add Interval' button is visible. At the bottom, there are 'Cancel' and 'Add' buttons.

- Under **Apply override to**, select the applicable dining option from the dropdown menu.

Add Override

Date
11/26/20

+ Add Interval Closed all day

Apply override to:
Select a dining option ▼
Takeout

Optional. Character limit - 50

Cancel Add

- Then, enter a note in the description field to remind you of the reason for the schedule change. This can include a holiday or event name and has a 50 character limit.

Add Override

Date
11/26/20

+ Add Interval Closed all day

Apply override to:
Takeout ▼

Description
Thanksgiving Holiday

Optional. Character limit - 50

Cancel Add

- Select **Add**.
- Select **Save** and **Publish Now** to finalize your changes.

Schedule Overrides

Customize your hours on specific days for takeout and/or delivery. This will only affect online ordering. Hours must be in increments of 15 minutes.

+ Add Override

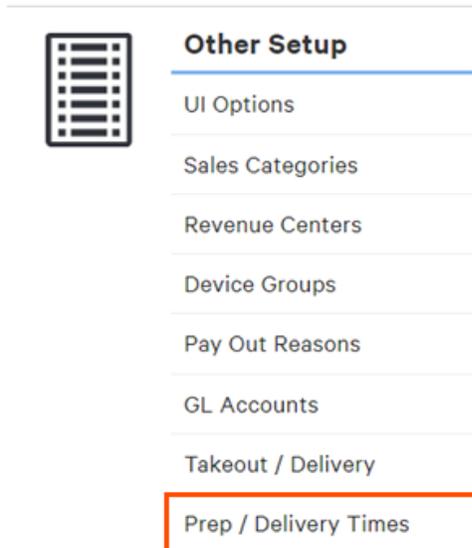
DATE	HOURS	DINING OPTION	DESCRIPTION	
11/26/2020	Closed all day	Takeout	Thanksgiving Holiday	Edit



If you need to edit a scheduled override, simply select *Edit* next to the date you wish to alter. If you wish to remove a scheduled override, select the trash can icon.

Setting Up Prep Times

Order Prep Time is the estimated time it will take to complete an order and is customizable to your restaurant. To change the default Prep Time settings, navigate to the *Prep / Delivery Times* section under the **Other Setup** header in the Toast back-end.



You will see three sections: POS Prep Time, Online Ordering/Order API Prep Time and Delivery Time.

- **POS Prep Time:** The time you set for *Default Prep Time (POS)* only affects the orders that are placed on your POS. The default Prep Time for this is 15 minutes.
- **Online Ordering/Order API Prep Time:** The time you set for *Default Prep Time (OO/API)* is added to the POS Prep Time when an online order is placed. This means, if you have your *Default Prep Time (POS)* set to 15 minutes and a *Default Prep Time (OO/API)* set to 30 minutes, when a customer takes an order they would see that their order will be ready in 45 minutes (30 minutes since it was ordered online + the 15 minutes the kitchen has to prep).

POS Prep Time

Set your preparation time for orders placed on the POS. Must be increments of 5 minutes.

Default Prep Time (POS): 15 minutes

Online Ordering/Order API Prep Time

Set your preparation time for Online Ordering/Order API. You can customize preparation times based on the price size of your order. Must be in increments of 5 minutes. To restrict Online Ordering orders over a certain price threshold, use Approval Rules.

Default Prep Time (OO/API): 15 minutes



You also have the ability to customize preparation times for online orders based on the price size by adding Prep Time Thresholds. To do this, you would select **+ Add Prep Time** and then add the price and prep time associated with that price. For example, you can set online orders that are \$50 or more to have a Prep Time of 30 minutes instead of the default 15 minutes.

Online Ordering/Order API Prep Time

Set your preparation time for Online Ordering/Order API. You can customize prep Ordering orders over a certain price threshold, use Approval Rules.

Default Prep Time (OO/API): minutes

[+ Add Prep Time](#)

MIN \$	MAX \$	PREP TIME
\$0.00	and up	time min <input type="text"/> <input type="text"/>

- **Delivery Time:** If your restaurant has Delivery enabled, you can set the delivery time for all delivery orders under the Delivery Time section. The default delivery time is 30 minutes. Note that the Delivery set time will also be added to the POS Prep Time.

Delivery Time

Set a delivery time for all delivery orders. This time will be added to the POS prep time.

Default Delivery Time: minutes

Online customers will receive an order confirmation page as well as an order confirmation email with the expected delivery or pick-up time.

Take Out (Online)

FirstName LastName 999-999-8818
testing@test1.com

Server: Toasty McToast 02/06/20 1:58 PM
Check #34 FirstName LastName
Expected: **Feb 6, 2:13 PM**

How was your visit?

👍👎

Chicken Sa-Te	\$6.95
Subtotal	\$6.95
Tax	\$0.48
Total	\$7.43

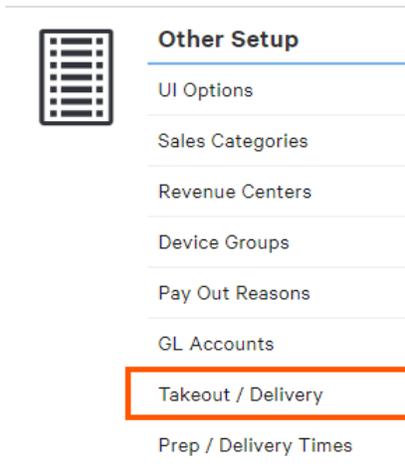


Customizing Delivery Settings

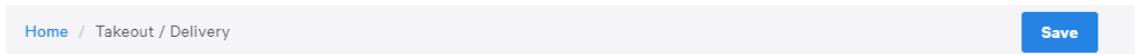
To offer delivery as an option for guests ordering online, follow the steps below to activate and customize your delivery settings.

Enabling Delivery

1. Select the *Takeout / Delivery* section under the **Other Setup** header in the Toast back-end.



2. Navigate to **Delivery Enabled?** and select *Enable Delivery*.



Takeout / Delivery

Delivery Enabled? Enable Delivery
 Disable Delivery

3. Next to **Billing Customer**, select a rule for collecting a guest's billing information.

Takeout / Delivery

Delivery Enabled? Enable Delivery
 Disable Delivery

Takeout Customer Information Prompt for takeout customer information (phone and name)
 Don't prompt

Billing Customer Billing customer information includes the name and phone of the person billed for the order. This configuration only applies to Delivery Orders and can differ from delivery customer information (name, phone, address to deliver to)

Billing customer information **always** matches delivery information
 Always Prompt for billing customer information **prior to** delivery information
 Always Prompt for billing customer information **after** delivery information



- **Billing customer information always matches delivery information** - Do NOT prompt for billing customer information when placing the order. Note that this is the default setting and will cover the majority of orders placed. Another option should be selected if you have customers that typically place orders to be delivered to someone else.
 - **Always Prompt for billing customer information prior to delivery information** - Prompt the guest to enter billing customer information BEFORE delivery information. Choose this option if you want to offer guests the ability to send delivery orders to a separate address.
 - **Always Prompt for billing customer information after delivery information** - Prompt the guest to enter billing customer information after delivery information. Choose this option if you want to offer guests the ability to send orders to a separate address.
4. Under **Receipt Printing**, you can choose which set of customer details, if any, you would like to print for both Takeout and Delivery receipts. Depending on your selection, staff will be prompted to enter this information in upon placing takeout and delivery orders. The guest's information will be saved to their customer profile.

Home / Takeout / Delivery Save

Receipt Printing

Takeout / Delivery Printer: Print On-Demand Only Receipt with takeout / delivery info will print here. [configure printers](#)

Override Digital Receipts? Yes (always print paper receipts for delivery checks) No (defer to tablet digital receipt configuration)

Print Guest Details - Takeout Include full guest details (name, phone number, email) Include guest's first name and last name initial only Don't include guest details

Print Guest Details - Delivery Include full guest details (name, phone number, address, email) Include guest's first name and last name initial only Don't include guest details

5. Be sure to **Save** and **Publish** your changes when finished.

Setting Delivery Fees

Additional fees can be set up for delivery by creating a service charge. This can help offset the cost of large delivery zones, food packaging and delivery equipment.

1. On the **Takeout / Delivery** settings page, navigate to the **Delivery Fee** section.
2. Select **Configure delivery service fees**.

Home / Takeout / Delivery Save

Delivery Fee

[Configure delivery service fees](#)

3. Select **+ Add** to create a new service charge.



Service Charges

Name	Type	Charge	Delivery	Tax Rate
No service charges				
<input type="button" value="+ Add"/> <input type="button" value="Order"/>		<input type="button" value="Show Archived"/>		

You can add any number of service charges and they can be optionally added to a check.

These charges are treated in two ways:

1. as gratuity to be paid to the server (or the driver on delivery orders), or
2. as non-gratuity assumed to be paid to the house and thus appearing in the restaurant's Net Sales amount.

Percentage based gratuity is calculated as a percentage of the pre-discount, pre/post-tax (configurable [here](#)) order amount .
These charges can be taxed and applicable taxes can be set in each service charge's details.

4. Here, you'll need to choose the following settings:

- **Name** - Name your service charge. Consider using "Delivery Fee" to distinguish between service charges.
- **Charge Type** - Choose Fixed Percent or Fixed Amount (dollar). Open Amount does not apply.
- **Charge Percent** - Enter a value for the charge. This is how much the delivery fee will be.
- **Apply After Amount Threshold** - Apply this fee if the pre-discount amount of the check is greater than or equal to this amount.
- **Assign to Check Owner (Gratuity)?** - Select **Yes** if the Delivery Fee will go to the driver. Select **No** if the Delivery Fee will go to the restaurant
- **Taxed?** - Check your state's tax laws to determine whether or not a Delivery Fee should be taxed.
- **Calculated on pre-discount or post-discount total?** - This setting determines if the threshold is calculated based on the pre-discount or post-discount total. By default, this setting is set to **Pre-discount Total**.
- **Delivery?** - Set to **Yes** so that the service charge is automatically assigned to Delivery orders.

Basic

Name

Charge Type Fixed Percent
 Fixed Amount
 Open Amount

Charge Percent %

Apply After Amount Threshold Apply this fee if the pre - discount amount of the check is greater than OR Equal to this amount.

Assign to check owner (Gratuity)? Yes, Assign the fee to the owner of the check.
 No, Assign the fee to the restaurant.

Taxed? Yes
 No

Calculated on pre-discount or post-discount total? Pre-discount Total
 Post-discount Total

Delivery? Yes
 No



- Then, enter a **Waive Fee Threshold** if you do not want the delivery fee applied to pre-discount checks greater than or equal to a certain value.

Delivery

Waive Fee Threshold

\$ 100.00

Waive this fee if the pre - discount amount of the check is greater than or equal to this amount (must be greater than \$0.00). If this amount is \$0.00, this fee will not be waived.

- Enter a **Delivery Distance Threshold** if you want this fee applied to checks equal to or beyond a certain delivery distance.

Delivery Distance
Threshold

5.0

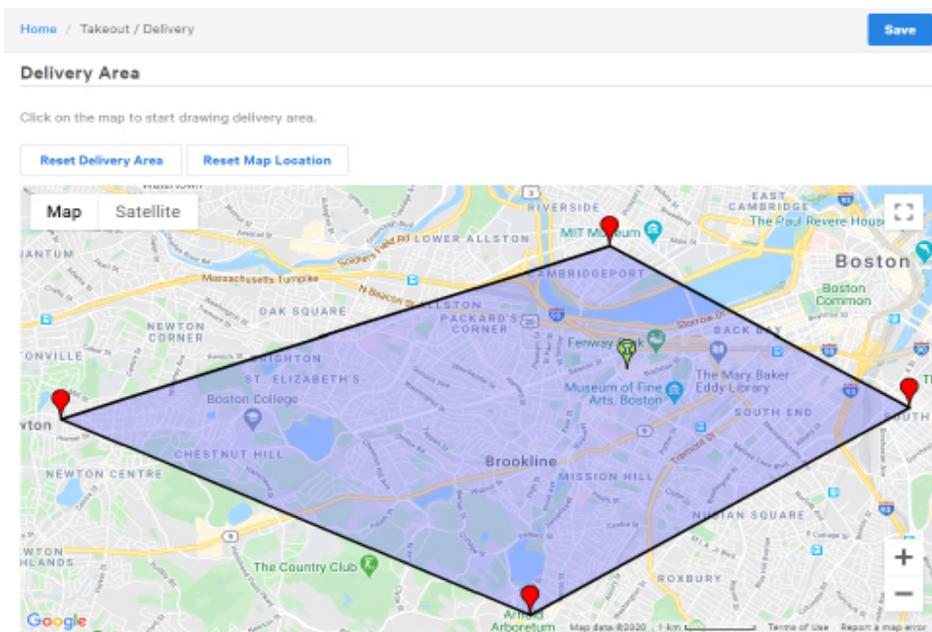
Only apply this fee if the delivery distance is greater than OR equal to this amount.

- When finished, be sure to **Save** and **Publish** your changes.

Delivery Area Settings

Use the built-in map feature to establish your maximum delivery distance from your restaurant. On the map, your restaurant is identified by a green pin.

- Select anywhere on the map to create a red pin, which is used to designate a delivery area limit.
- Add as many pins as needed by selecting other parts of the map. Select and drag existing pins to move them to new areas. Note: The territory within your delivery area will be highlighted in blue.



- Then, **Save** and **Publish** your changes.

When new delivery orders are placed in the restaurant or online, Toast will compare the set delivery area to the customer's address and automatically allow or deny the order from being placed.

Should you expand your delivery fleet or want to change your designated delivery area, select **Reset Delivery Area** and follow steps 1 - 3.

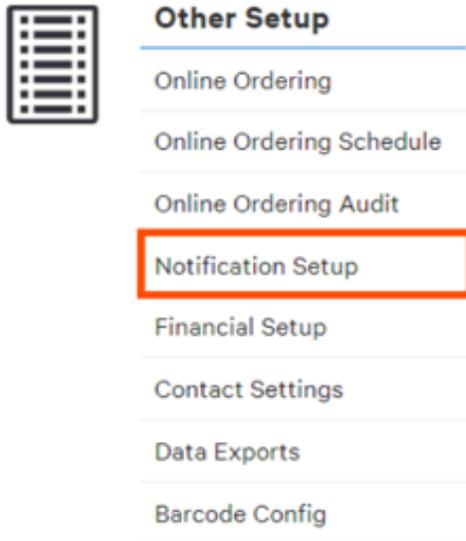


Online Ordering Notifications

Pop-up alert notifications can be set up to appear on your Toast device when a new online order is received. This is especially helpful for restaurants who require approval for online orders.

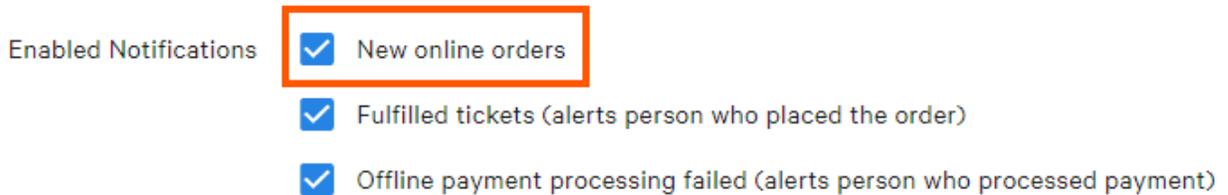
Notification Setup

1. To set up notifications for online ordering, select the **Notification Setup** section under the **Other Setup** header in the Toast back-end.



2. Under the Enabled Notification section, select **New online orders**.

Notification Setup



3. Then, **Save** and **Publish** your changes.

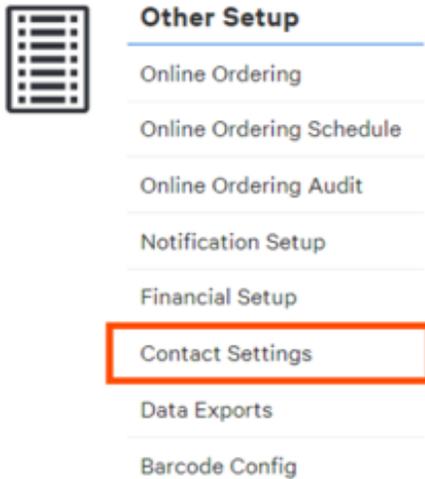
Once enabled, new online order notifications appear as a pop-up alert on your POS devices.



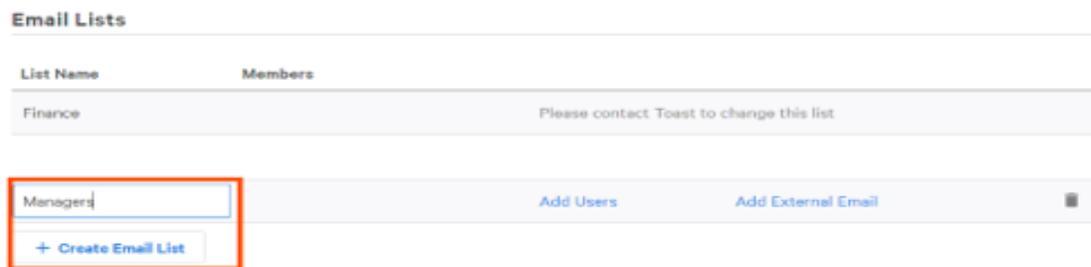
Receiving Email Notifications for Online Orders

To further ensure Online Orders are not overlooked or missed, you can create a contact group in Toast that can receive email notifications anytime an Online Order is placed.

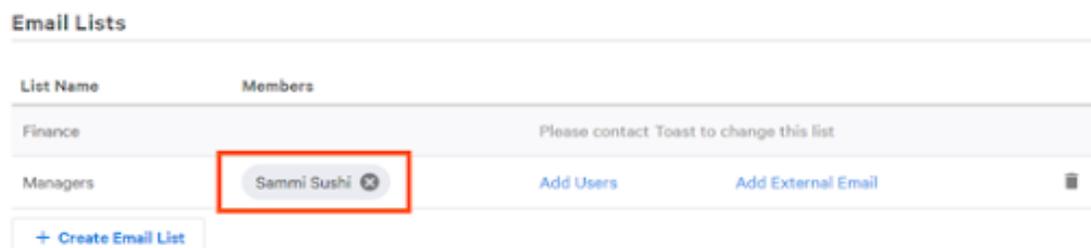
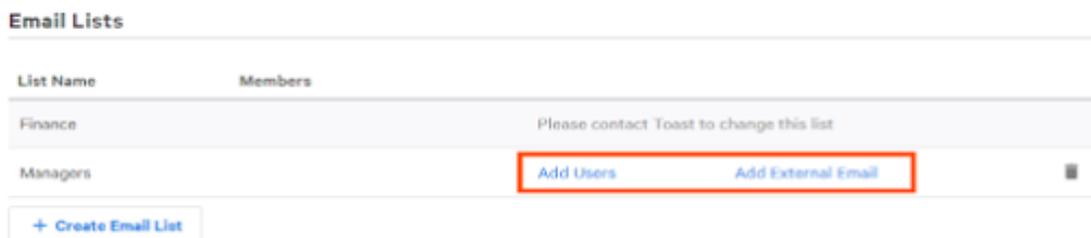
1. To set up Email Notifications for Online Orders, select **Contact Settings** under the **Other Setup** header in the Toast back-end.



2. Navigate to Email Lists and select +Create Email List. Then, name this email list. For example, you could name an email list "Managers."



3. Add existing users or external email addresses to the new contact list by selecting **Add Users** and/or **Add External Email**.



- Next, under the **Email Contact Settings** header, you can add the Email List to *Incoming Orders* and *Delivery Orders* by using the dropdown menu.

Email Contact Settings

Nightly Summary	<input type="text"/>	
Release Notes	<input type="text"/>	
Incoming Orders	Managers	Notification for new toast online orders.
Delivery Orders	No List Selected	Notification for new delivery orders.
	Finance	
Finance Emails	Managers	

- Then, **Save** and **Publish** your changes.

Once published, the members of this email list will receive notifications to their emails when online orders have been placed.

Customizing the Appearance of Your Online Ordering Menu

Making Imagery Visually Engaging

Once configuration is complete, it's time to make your site visually engaging. Here are some best practices to follow when choosing your images.

- Use high quality photos. Anything grainy or blurry will look unprofessional.



- Toast recommends using our specified dimensions closely when uploading any photo including your logo, background image and banner.
 - Restaurant Logo:** Square .PNG image at least 180px x 180px (1:1 aspect ratio)
 - Banner Image:** This .PNG image should be at least 1920px x 1080px (16:9 aspect ratio). The image below demonstrates the area (16:9) that will be visible in the new banner if a 9:1 image is used. Try to avoid overly busy patterns.



To upload your logo and banner image, navigate to **Restaurant Info** under the **Marketing** section of the Toast back-end and select **Choose Image**.

Restaurant Name	<input type="text" value="Blurred Limes"/>	Blurred Limes ⓘ 401 Park Dr Boston, MA 02210 123-456-7890 Activated View Public Page →
Location Name	<input type="text"/> <small>Optional. This is used externally to differentiate multiple locations; it should be a customer-friendly name, e.g. Neighborhood, Square, City, Hotel.</small>	
Location Code	<input type="text"/> <small>Optional. This is used internally to differentiate multiple locations; it is typically a 3 or 4 letter code.</small>	
Restaurant Logo	 Choose Image	
Banner Image	 Choose Image 	
Background Image	 Choose Image 	
Restaurant Description	<input type="text" value="Traditional Mexican recipes, reinvented"/> <small>This is what customers will see on Toast's website. Include messaging that you want to associate with your restaurant, such as information about the atmosphere and food.</small>	

To upload images for your menu items, select the item from **Advanced Properties** and navigate to the **Properties** section. Then, select **Choose Image**.

Properties

Description	<input type="text" value="Avocado, tomatoes, onions, garlic, cilantro, lime, kosher salt"/>
Calories	<input type="text" value="example *270*"/> <small>Please enter numeric caloric value of the item.</small>
Image	 Choose Image 

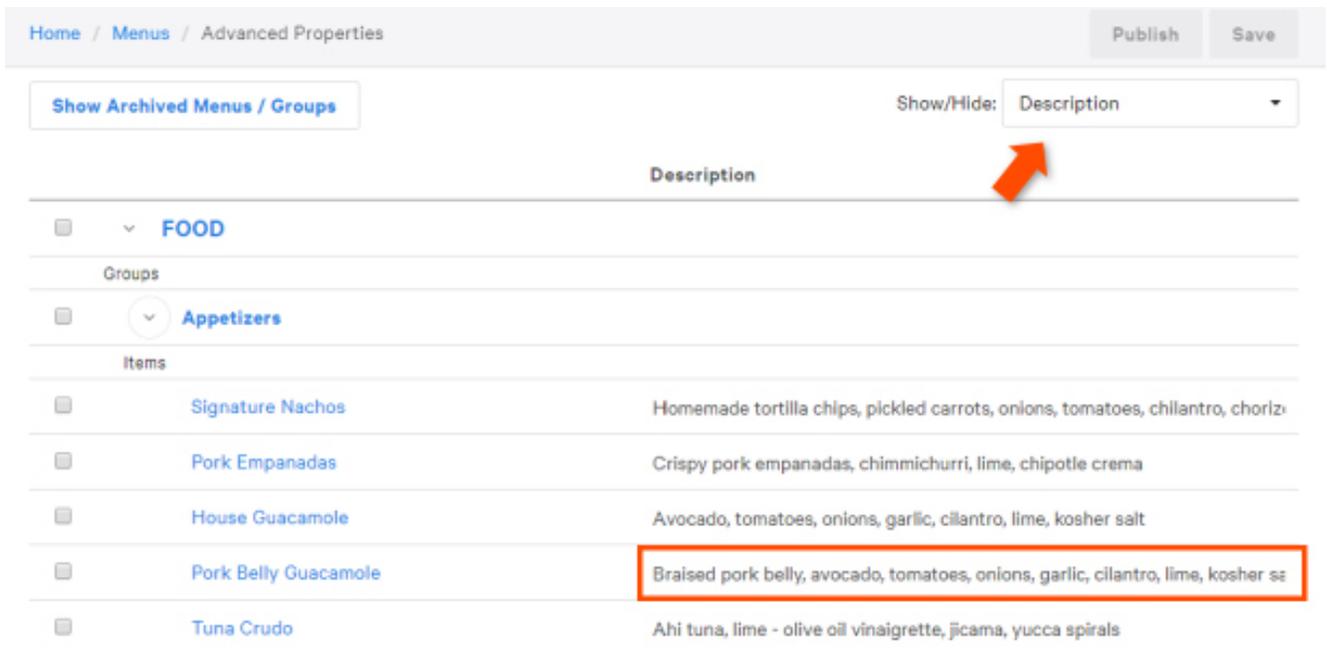
Menu item images should ideally be rectangular and 750px by 450px in size. After uploading your image, be sure to **Save** and **Publish** your changes.



Adding Dynamic Item Descriptions

You also have the option to add descriptions for your items. Use this space to tell your guests about the ingredients you use, possible allergens and which dishes are the most popular at your restaurant.

1. Using the Show/Hide dropdown in **Advanced Properties**, select the **Description** tool. Once this tool is selected, a checkmark will appear next to the name of the tool.
2. In the description field, type in the ingredients for each item. Feel free to highlight speciality ingredients with adjectives like “Homemade Challah Bread” or “Signature Vodka Sauce.” Allergy information can also be easily included by using abbreviations and parentheses.



Home / Menus / Advanced Properties Publish Save

Show Archived Menus / Groups Show/Hide: Description

Description

FOOD	
Groups	
Appetizers	
Items	
<input type="checkbox"/>	Signature Nachos Homemade tortilla chips, pickled carrots, onions, tomatoes, cilantro, chorizo
<input type="checkbox"/>	Pork Empanadas Crispy pork empanadas, chimichurri, lime, chipotle crema
<input type="checkbox"/>	House Guacamole Avocado, tomatoes, onions, garlic, cilantro, lime, kosher salt
<input type="checkbox"/>	Pork Belly Guacamole Braised pork belly, avocado, tomatoes, onions, garlic, cilantro, lime, kosher salt
<input type="checkbox"/>	Tuna Crudo Ahi tuna, lime - olive oil vinaigrette, jicama, yucca spirals

3. When finished, **Save** and **Publish** your changes.



We empower
the restaurant community
to delight guests
do what they love
and *thrive.*