Online Ordering

SETUP GUIDE

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Introduction

With built-in online ordering, Toast enables you to have an online ordering website that matches your brand while tightly integrating with your kitchen operations for maximum efficiency. In order to customize your online ordering site to meet your restaurant's needs, you'll need to make some changes to your menu, device configurations and online ordering settings in Toast's back-end. This guide will walk you through each required setting and the effect it will have on your online ordering website. By following these best practices before publishing your website, you and your guests will be sure to have a seamless experience.

Developing Your Online Ordering Menu

We want to make sure it's easy for guests to navigate your menu both online and on the Toast Takeout App. Check out these tips for ideal online menu structure.

Tip 1: Customize Item Availability Online

Menus, groups, items, modifier groups, and modifier options that are visible on your POS can be hidden from your online ordering menu by selecting *POS Only* visibility in Advanced Properties.
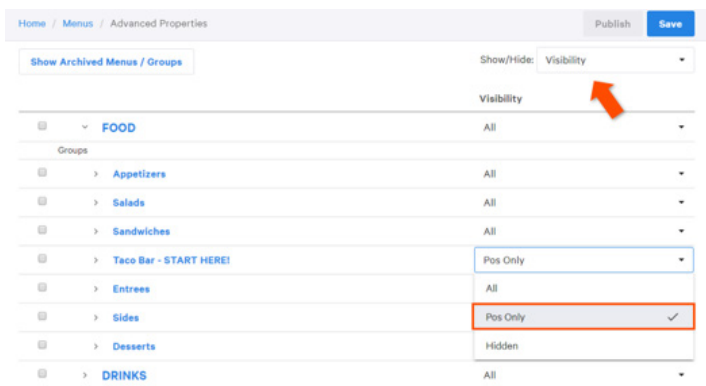
Note that there is no online ordering only visibility setting. If you'd like any menu item to be visible only on your online ordering site, we suggest putting it at the end of the list so it will appear last on the POS. We also recommend training your staff to not use the online ordering only buttons. You can set the POS name to say "---" or "Online Only" and color it dark gray.

Tip 2: Progress your menu gradually through a clear hierarchy

Don't present every item at once. We recommend using a three-step menu hierarchy: Menu -> Group -> Item.

3
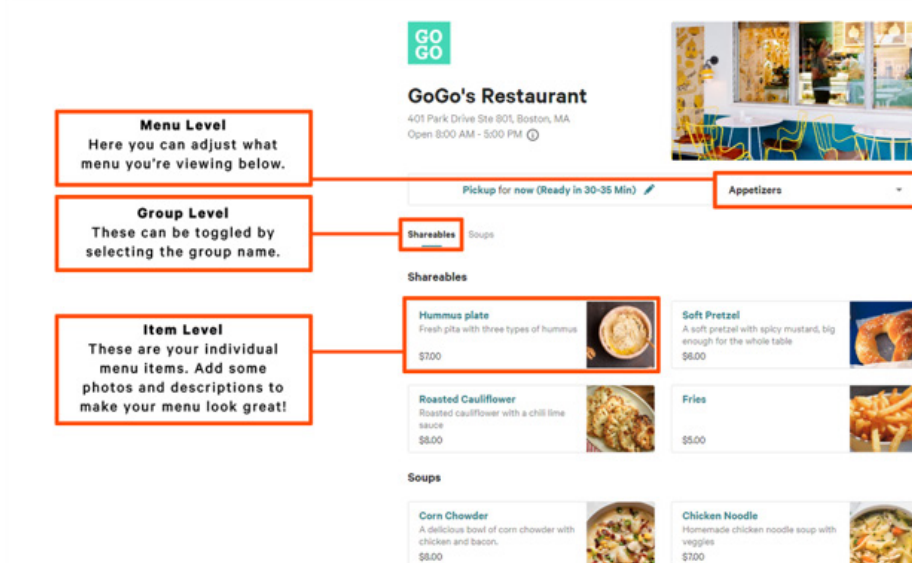
If you are unable to use the three-step menu hierarchy for your operation, consider creating a separate menu labeled "Carry Out" or "To Go" with the above structure for Online Ordering.

Optional: Upload high quality images and enter item-level descriptions

Once your menu is optimized for online ordering, consider adding images and descriptions to items to further entice your guests.

Avoid using any poor quality pictures in your menu. Additionally, keep your pictures consistent. Maintain a similar zoom distance, as well as similar brightness and color schemes.

Adding a description for every item, with the exception of basic drinks and sides, will help guests familiarize themselves with your fare and identify possible allergens.

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.

Setting Up an Auto-Firing Device

To receive online orders, you need to set one device in your restaurant that will fire online orders to the kitchen. We call this an "auto-firing" device and you can't receive online orders until it's configured. This setting must be enabled on the device itself and should only be enabled on one device per location. To enable Order Auto-Firing:

1. Select the Toast logo in the top-left corner on the device screen.

2. Select *Device Setup* under the *Setup* section.

Setup		
Menu	Tables	Labor
Disable Test Mode	Other Setup	Device Setup

3. Locate and select the *Order Auto-Firing* option.

4. Select *Yes,* then *Continue.*

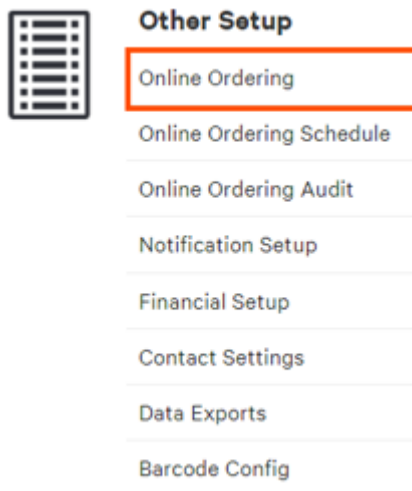Order Auto-Firing is now enabled on this device!

Selecting Your Online Ordering Settings

Now that your menu has been optimized for your online ordering page and Order Auto-Firing has been enabled on one device at your restaurant location, it's time to turn online ordering on! The following few sections will walk you through how to toggle online ordering, set up approval mode, direct online orders to a designated server and select the dining options and payment methods you would like to offer.

These settings are managed in Toast's back-end and we recommend completing these steps for your restaurant while going through this guide simultaneously.

Turning On Online Ordering

1. In Toast's back-end, navigate to *Online Ordering* in the *Other Setup* section.

Other Setup

Online Ordering

Online Ordering Schedule

Online Ordering Audit

Notification Setup

Financial Setup

Contact Settings

Data Exports

Barcode Config

2. Next, select *Accept online orders* and *Save* your changes.

Toggle Online Ordering

Accept Online Orders
- Accept online orders
- Snooze online orders temporarily
- Don't accept online orders
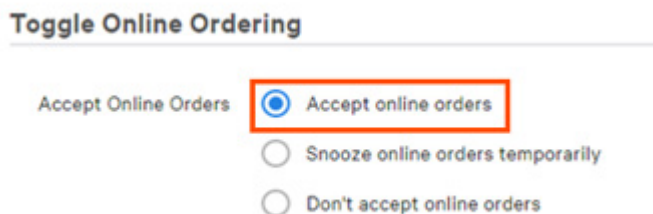
Online Ordering is now enabled and your guests will be able to submit orders.

Setting an Approval Method

From the *Online Ordering* page, navigate to the *Approval* section. This is where you set the behavior for incoming online orders and how they are received at your location. There are three approval method options: *Approve manually, Send orders directly to kitchen,* or *Use rules*.

Option 1: Approve manually

This pushes all incoming orders into the Pending Orders screen. All orders will need to be manually approved by an employee within five minutes from when the order was placed. Guests that have their orders approved will be sent an email notification with their order summary. If the order is not approved within that time, your guest will be notified that their order has not been approved and instructed to contact the restaurant for further details.

To access the Pending Orders screen, navigate to the *Device Menu* and select *Pending Orders*.

All orders that require employee approval will appear under the *Needs Approval* tab and once highlighted, will need to be approved by selecting *Approve*.

Option 2: Send orders to kitchen

If your online orders don't need to be approved by an employee, they can be sent to the kitchen printer as soon as the customer places the order. To do this, only one device must be configured to auto-fire these orders.

Note that orders cannot be manually rejected in this configuration. If for any reason an order cannot be fulfilled, we suggest that you reach out to the guest to make appropriate arrangements.

Option 3: Use rules

This setting uses preset rules to determine if an online order should be sent directly to the kitchen, requires order approval through the Pending Orders screen or if it needs to be automatically rejected.

You can choose to enable the following rules:

- **Cash Threshold**: Online cash orders over the specified trigger amount can be set to require manual approval or set to be automatically rejected. Useful for locations that don't allow their delivery drivers to carry more than a specific amount of cash during their shift.

- **Credit Minimum**: Online credit card orders under the specified trigger amount can be set to require manual approval or set to be automatically rejected. This option may be useful for locations that do not accept small online orders paid with credit cards.

- **Delivery Minimum**: Use to automatically prevent any online delivery orders from being placed unless they reach a minimum total. Applies to all cash and credit card orders, can be used alone or with the other two options.

- **Total Amount:** This can be used for orders whose post-tax total are at or above this specific amount.

In the following example, if an online order comes through your Toast online ordering website that is less than $5, it will automatically be rejected.

Approval Rules

Use rules to determine if orders should be sent directly to the kitchen. Enabled rules are evaluated in this order: Reject and then Approval Required.

Enable	Rule Type	Enforcement	Trigger Amount	
☐	Cash Threshold	Approval Needed ▾	$ 0.00	Cash orders at or greater than this amount.
☑	Credit Minimum	Reject ▾	$ 5.00	Credit orders under this amount.
☐	Total Amount	Approval Needed ▾	$ 0.00	Orders whose post-tax total at or greater than this amount

Set Dining Options

This section allows you to set up your dining option behavior for online orders. In the example below, we want to make sure the online *Take Out* function is assigned to the Take Out dining option, and the online *Delivery* function is assigned to the Delivery dining option.

Dining Options

Takeout Option   Take Out ▾

Guest Communication: Take Out

You can select to provide instructions to your guest on how to collect their food when they arrive to your restaurant. This message will be seen on the order confirmation page and in the digital receipt.

○ Add instructions
◉ No instructions

Delivery Option   Delivery ▾

Guest Communication: Delivery

You can select to provide instructions to your guest for delivery orders. This message will be seen on the order confirmation page and in the digital receipt.

○ Add instructions
◉ No instructions

You also have the option to add a customized message to your guest by selecting *Add Instructions*.

- A sample takeout message could be: "Thank you for your order! Please look for your order at the left hand counter."

- A sample delivery message could be: "Thank you for your order! We will call you when your order is outside your door."

Once set up, the custom messaging will appear on the guest's Order confirmation screen and E-Receipt.

Server Selection

All orders have a designated server used to manage tips. Some restaurants create a virtual server such as "Online Ordering Server" so that all online ordering tips can be pooled or shared easily.

- **Assigned by Auto-Firing Tablet** If online orders do not require approval, select *Assigned by Auto-Firing Tablet* in the drop-down menu. Your orders will automatically be sent to the correct printer.

  If this option is selected, the check will always be assigned to the last employee to enter their passcode and sign into the order auto-firing device. It's important to know that the orders will be assigned to the last employee to enter their passcode on the auto-firing device, even if that employee is now clocked out.

- **Assign Online Order Server** For cases where online orders require approval, assign a server using the dropdown menu. We suggest setting up a generic "Online Ordering" employee to be used specifically for Online Orders and select them as the Online Order Server. This will automatically assign this server to all online orders, regardless of who logs into the auto-firing device.

Assigning a Revenue Center

Orders placed through your online ordering platform can be mapped to a new or existing revenue center. This is useful if you'd like any orders placed through your online ordering platform to be reported independently from other areas of revenue generation. SBecause revenue centers help you segment your sources of revenue in the restaurant, we recommend you create a revenue center called "Online Ordering".

1. To do this, navigate to *Other Setup* in Toasts back-end and select *Revenue Centers*.
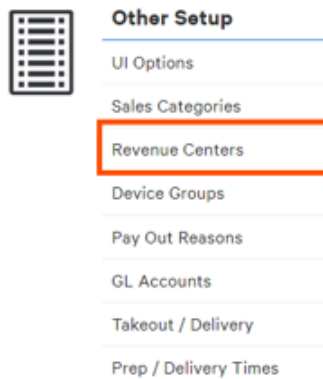
2. Select *+Add* to create the revenue center and name it "Online Ordering".

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

Now that we have created the Online Ordering revenue center, you can map online orders to it.

1. To do this, navigate to *Other Setup* and select *Online Ordering*.

2. Scroll to the *Revenue Center* section and select *Online Ordering* from the Revenue Center Mapping drop down menu.

In your sales reports, all online orders will appear in the revenue center designated for online orders.

Online orders can also be mapped to existing revenue centers. For example, if you already have a revenue center for takeout/ delivery orders and you'd like online ordering to be within that revenue center, you can do so by mapping your online orders to it as well.

Set Payment Methods

Select whether customers can pay in-store and/or online, and what forms of payment they can use for each dining option.

Then, decide whether guests ordering online are allowed to add tips to an order when paying with a credit card.
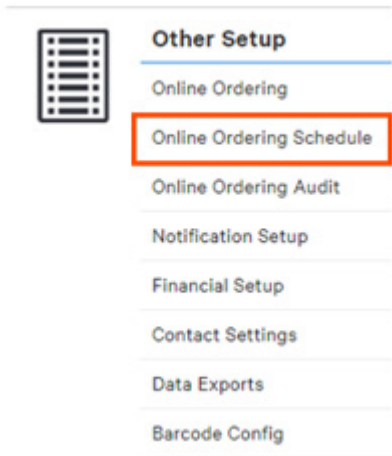

Entering Your Online Ordering Hours

You'll also need to set your online ordering hours for your restaurant. In some cases, your online ordering hours may be the same as your restaurant hours. Or, maybe you offer online ordering at certain times or on specific days. Keep in mind that hours can only be set in 15 minute increments.

Setting up the hours for Online Ordering is different than setting up the hours for your restaurant. Toast recommends reviewing your restaurant hours before setting your Online Ordering hours to ensure times align properly.

1. In Toast's back-end, navigate to the *Other Setup* section and select *Online Ordering Schedule*. Your existing restaurant hours will automatically migrate over, setting the same hours for Online Ordering, by default.

2. In the *Online Ordering Hours* section, select *Edit* for the day you'd like to change. We recommend you stop taking Online Orders 1-2 hours prior to close in order to ensure order fulfillment. Select *Delivery* or *Takeout* to set the hours for each option.
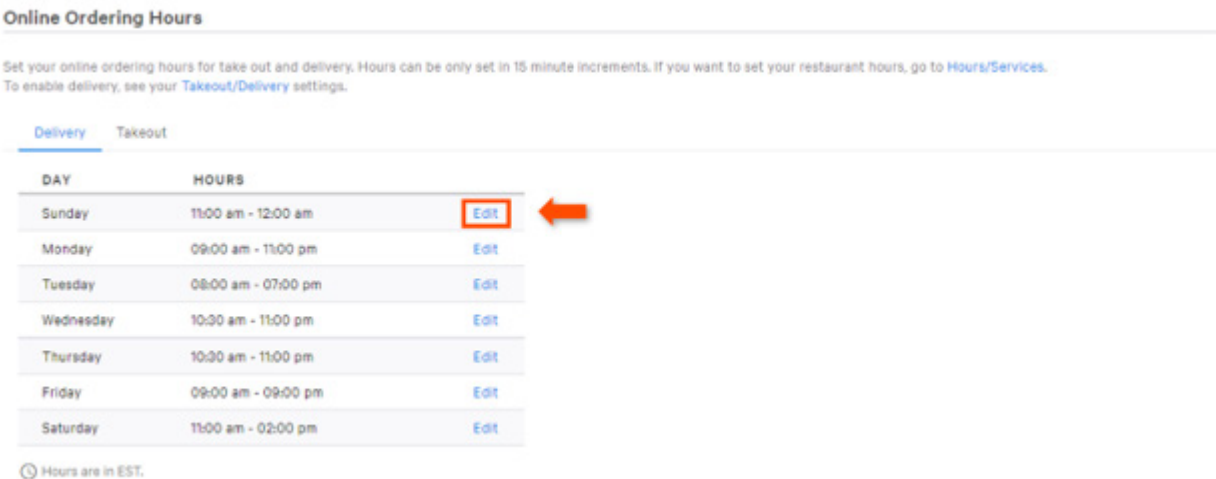
3. Enter the Open and Close times for online ordering.

4. If online ordering spans multiple meal shifts, you can add intervals of time by selecting +Add Interval. Use the dropdown menus to select minutes and the time of day.

Edit Takeout Hours for: Sundays

Open   Close

10 : 30 ▾   am ▾   to   10 : 00 ▾   pm ▾   Clear

+ Add Interval   ☐ Closed all day

Apply hours to:

(Su) (Mo) (Tu) (We) (Th) (Fr) (Sa)

Cancel   **Update**

For example, the image below is showing a restaurant whose Online Orders on Sundays are available from 10:00am - 12:00pm, but **not** available from 12:00 - 12:30, and then available again at 12:30pm - 10:00pm.

Adding time intervals is useful if you want to ensure employees have a break for lunch, etc.

Edit Takeout Hours for: Sundays

Open   Close

10 : 00 ▾   am ▾   to   12 : 00 ▾   pm ▾   Clear

12 : 30 ▾   am ▾   to   10 : 00 ▾   pm ▾   Clear 🗑

+ Add Interval   ☐ Closed all day

Apply hours to:

(Su) (Mo) (Tu) (We) (Th) (Fr) (Sa)

Cancel   **Update**

5. To apply the same hours to other days of the week, select the day(s) under *Apply hours to,* for any applicable days.

Edit Takeout Hours for: Sundays

Open   Close

10 : 00 ▾   am ▾   to   12 : 00 ▾   pm ▾   Clear

12 : 30 ▾   am ▾   to   10 : 00 ▾   pm ▾   Clear 🗑

+ Add Interval   ☐ Closed all day
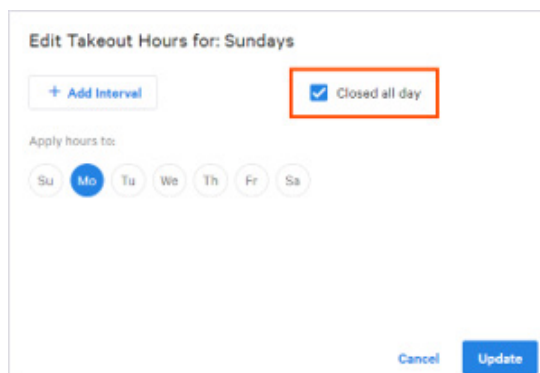
Apply hours to:

(Su) (Mo) (Tu) (We) (Th) (Fr) (Sa)

Cancel   **Update**

6. Schedules can also be edited to include days that you are closed by selecting the *Closed all day* box.
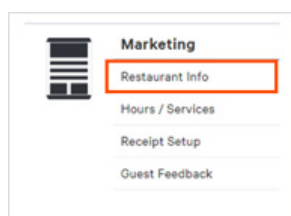

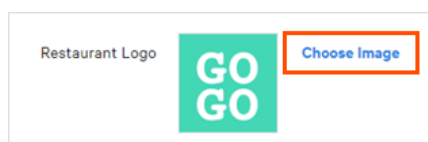7. Make sure to select *Update* to save your changes.

Customizing and Sharing Your Online Ordering Page

Now it's time to add your finishing touches to your online ordering website and share it with your guests! Follow the guidelines below to add a restaurant logo and create your Toast Tab Page URL.
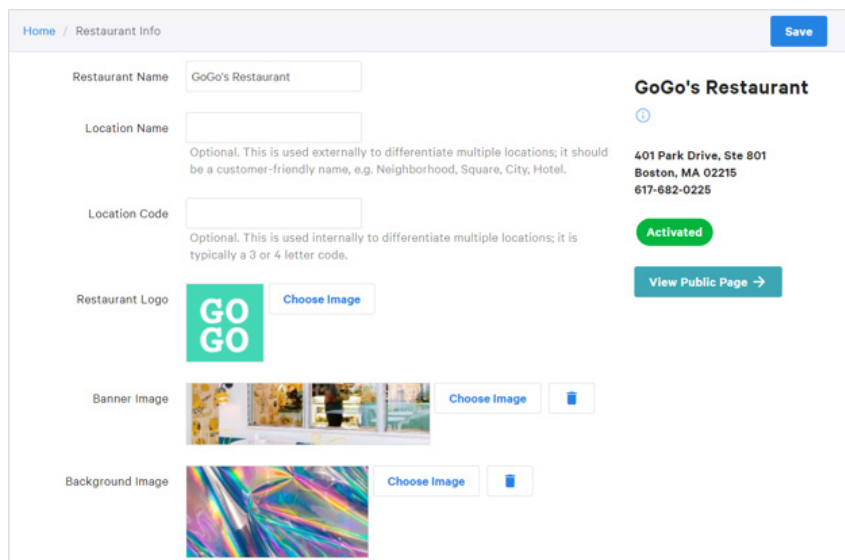
1. In Toast's back-end, navigate to the *Marketing* section and select *Restaurant Info.*

2. Locate *Restaurant Logo* and select *Choose Image.* For best results, we recommend using a square .PNG file that is at least 180px by 180px in size.

3. Under *Banner Image,* select *Choose Image* to upload a banner image for your website. We recommend uploading a rectangular .PNG file that is at least 1920px by 1080px in size.

4. Then, scroll down to *Toast Tab Page* and enter a custom URL for your restaurant. We recommend using your restaurant name here.

Toast Tab Page   http://toasttab.com/   gogos-drive-in

5. When finished, be sure to *Save* and *Publish* your changes. Then, select *View Public Page* to see your Online Ordering site in action!

Now that you've set up your online ordering page, feature your online ordering link prominently on your restaurant's website and social media pages. For button templates and other examples of online ordering buttons, check out this article. You are well on your way to becoming a Toast Online Ordering expert!

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