

Getting started with Toast is exciting for your restaurant and some of the functionality will differ from your prior POS. We outlined a quick guide to help you get started!

Cash Management

Cash Management automatically tracks your restaurant's cash flow and the balance of your cash drawers. All calculations are performed automatically, eliminating the need for managers and servers to spend time counting and recounting cash.

How does it work? Cash Management logs all cash drawer activity. When logging into Cash Management, you will see all your cash drawers and corresponding printers. The padlock icon indicates if a cash drawer is locked; a manager or server at shift review must close out the cash drawer they are locked to prior to clocking out.

During a shift, the 'Cash In' function adds cash to the drawer; Similarly, the 'Cash Out' function subtracts from the balance of the cash drawer. There is the opportunity to include a reason that can be viewed in reports for cash in and out. Servers and Managers can see transactions in the 'Cash Drawer Report.' Managers can set a default daily starting balances in 'printer settings' and adjust as needed.

Once shift review is complete, the cash drawer can be closed. Managers can navigate to 'Manager Activities' > 'Cash Management' and select the drawer(s) to close, and 'Close Drawer.' The count includes the starting balance and counted money is entered into 'Cash Actual.' Manager confirms there are no unpaid checks, the only open drawer(s) are for the next shift, and all employees are clocked out. Print the report to complete cash management.

Learn More: Cash Management Guide, Cash Management Overview, Confirming Cash Drawer Close Amount

Shift Review

'Shift Review' is a comprehensive summary of the employees activities including orders, payments, tips and reporting data. Shift review can be enabled for full service and quick service restaurants. The shift review checklist is designed to support closing out the shift and can be set as required via UI Options. As part of shift review, Toast offers the ability to easily edit closed checks and the checklist helps reduce the need to go back and edit the 'Server Review Report.'

The shift review process and report can be customized based on the restaurant's needs through the Toast back-end. At quick service restaurants, cashiers assigned a cash drawer are required to complete shift review procedures.

To manage employee theft, there is an option to set the cash drawer up as a 'Blind Cash Management' where the user assigned to the cash drawer does not see expected cash amounts during and at the end of the shift. This is recommended for a cashier that closes the shift by counting the cash in the drawer and not knowing what the expected amount should be while being able to do other cash adjustments.

How does it work? 'Manager Activities > Shift Review' shows the shift reviews for all servers. As a server, go to 'My Account > Shift Review' to close out. The steps include:

1. Close unpaid and unclosed checks
2. Declare cash

3. Collect cash and Tip Out. For reporting accuracy, you'll need to mark your cash as being paid to the house and that you've been paid your Credit/Non-Cash Tips
4. If you are using Cash Drawer Lockdown, you'll be required to count and record the amount in the drawer. The drawer will need to be closed before completing Shift Review
5. Clock Out

Next, a manager, goes to 'Manager Activities> Shift Review' to close out. The steps include:
6. Ensure all shift reviews belonging to the shift are marked with the final green status indicator, 'Tips have been paid to employee'. If not closed, go back to employees to complete shift review.
7. Navigate to 'Cash Management > Cash Drawers'
8. Cash Drawer can be in the following states: "Active" (being used), "Open" (not in use, not being used), and "Closed" (balance entered into toast). Selecting a "New" drawer will replace the current active one and the prior one will need to be closed later.
9. Select "No Sale" to open the cash drawers needed to close, count the cash, enter into Toast, and close the active/open cash drawers.
10. Cash drawers can also be closed in the back-end from 'Sales Report > Cash Drawers'

Learn More: Close Out Training, End of Shift Review, Employee Shift Review, Bartender Shift Review

Advanced Tip Pooling

Toast does not offer formal tip pooling functionality; however there is a solution to share tips.

How does it work? Managers can set up options for tip pooling in the Toast back-end. Navigate to 'Other Set Up > UI Options > Shift Review.' Go to 'Sales Category Tip Percentages' and click the green box. Use the description field to define which jobs will receive a set percentage from a sales category (e.g. 3% of food goes to busers, 2% of alcohol goes to bartenders). When completing the shift review, this information will show up on the report with the amounts automatically calculated. At the end of the shift, each server will put total cash amounts due in envelopes for pooling and add a negative tip amount (setting must be enabled in the back-end) to account for amounts paid.

If tip pooling comes out of payroll, the manager can take the payroll export, run a formula in Excel to adjust for tip pooling, and upload the adjusted file to the payroll vendor.

Learn More: Share Tips

Split Checks

Toast's process for splitting checks is incredibly simple once you learn how to use it! The flexibility of the Android platform lets us build a simple and effective workflow.

How does it work? Splitting checks by item is simple. On any check, select the 'Split' button. The 'Split' screen shows all items on the check. To split by item, the options are:

- **Tap and Drop** - In Split mode, simply tap individual items and move to a new check
- **Split Button** - Tap this with an item selected to be prompted to divide the item by any number.
- **By Seat #** - If the server has designated seat numbers for each item, this will split the check by seats with one tap.
- **Done** - To complete changes and exit the 'Split' Screen

Learn More: Split Checks

Check Transfer

Checks can easily be transferred between servers on an individual basis or bulk transfer.

Toast's 'Bulk Check Management' allows servers to update multiple checks at a time. This is useful should you need to:

Change shifts quickly and send multiple paid and/or open checks to a new server

Close several paid checks at one time

Perform a bulk void of checks

How does it work? In the Toast back-end, 'Bulk Check Management' permissions are found in the Manager Access Permission section:

- **Bulk Transfer Checks** - Allows multiple checks to be selected and re-assigned to another server
- **Bulk Void Open Checks** - Allows multiple open checks to be selected and voided
- **Bulk Close Paid Checks** - Allows multiple paid checks to be selected and closed

To bulk transfer checks, navigate to the "Previous Checks" or "Payment" screen, and press and hold a "check" selection. The long hold will trigger the ability to select multiple checks or 'select all.' For quick access, in the upper right hand corner select 'void' or 'transfer checks.' For 'transfer checks,' clocked in employees will show up and the server can select a person to receive the checks and select 'yes' to confirm and complete the transfer.

Learn More: Transfer Checks, Interactive Check Transfer, Bulk Check Management.

Check Screen

Toast's payment terminal is more advanced with the the option to see open and closed checks, and filter views by server or bartender.

How does it work? In Toast, a server or manager can select 'Payment Terminal' mode, which will default to a view of all checks. The server can select the overflow menu in the top right corner and 'Advanced Filter' and choose the parameters

to sort by; options include, Check Number, Table Number, Recent/Oldest, Amount, Customer. They can be selected for Current User, Order Type, Dining Option. When you exit the 'Payment Terminal' and re-enter, the last sorted view remains.

[Learn More: Sorting Checks from the Payment Terminal](#)

Seat Numbers

Toast has the option to require seat numbers when entering orders, which leads to accuracy for every seat. Full service restaurants most often use seat numbers. When entering orders, select the menu item then assign a seat number.

Toast improves accuracy and can save time at checkout and by requiring seat numbers, a server will never spend extra time splitting checks.

How does it work? Seat numbers can be assigned to different guests at a table when using either Table Service Mode or Quick Order Mode. To enable this feature, Navigate to Toast's back-end, 'Other Set Up > UI Options > Order Screen > Seat Number and check the enabled box (and 'Required Box' if you'd like this option to be required). When entering menu items, the server will enter the item ordered, select the 'Seat Number' button, then hit the seat number (e.g. 1, 2, 3). The seat number will appear on printed kitchen tickets.

[Learn More: Seat Numbers](#)

Quick Service Screen

To ensure ease of setup and maintenance, Toast does not offer advanced quick service functionality. Table Service and Quick Service screens are the same; however, "quick service" restaurants can utilize 'Quick Order Mode.'

How does it work? In the Toast back-end, navigate to 'Kitchen/Dining Room > Service Areas > Quick Order Mode' and select 'Quick Order Mode.' This eliminates the need to set up table service areas and enable servers to take orders at the terminal.

Quick service restaurants have the ability to take a customer's cell phone number when they order and send a text message when the order is fulfilled. This eliminates the need to call out orders as they are ready.

[Learn More: Text Message when Order is Fulfilled](#)

86'ed Items

Toast offers the ability to mark items Out of Stock using Quick Edit Mode.

How does it work? Manager logs into Toast and presses and holds the menu button for the item that is out of stock to prompt 'Quick Edit Mode.' On the item, select the 'Inventory' drop down, 'Out of Stock', and 'Done.' Once an item is marked 86'ed, the item will be grayed out and unselectable with a zero in the corner.

[Learn More: 86'ed Items](#)

Gift Cards

Third Party Resellers: Toast is able to support selling gift card to third party resellers through integrations with Paytronix and Valuetec; these vendors integrate with Blackhawk Network.

Liabilities: Restaurants have the ability to sell electronic and physical gift cards and can import outstanding liabilities into Toast. Toast's gift card module cannot support gift card pooling and there is no option to send money to a centralized account or transfer liabilities between stores within the POS.

How does it work? Toast offers the [Gift Card Liabilities Report](#) which tracks gift card transactions in relation to the store that owns the cards liability versus the store that redeemed the amount. This report allows you to periodically audit how much each store owes the others based on liability amount versus redeemed amount. Managers can perform monthly reconciliation using the report.

[Learn More: Gift Card FAQs](#)

Kitchen Display Screens (KDS)

Hardware: Toast offers a variety of KDS touchscreen sizes to fit almost any space. Customers can take advantage of a smaller KDS in stations and a big screen for expo; each device can be mounted using standard VESA hardware creating more flexible options. The KDS is touchscreen and does not have the bump bars seen in legacy KDS. When installing KDS, it is important to determine if your staff can reach the touchscreen without the bump bar prior to installation.

[Learn More: KDS 2.0](#)

Individual Prep Station Fulfillment

Toast's default settings for individual prep station fulfillment are if a line cook at one prep station bumps an item off of the KDS, it will be bumped off of all other KDS displays. Toast offers a solution for kitchens that require items mapped to multiple prep stations to be fulfilled independently, without bumping the other prep station's ticket.

How does it work? In order for independent fulfillment to occur, different ingredients need to be mapped to separate stations. This can be done with default modifiers, use the following steps:

1. Navigate to the 'Menu Group' that contains the 'Menu Item' to be mapped
2. Create a 'Modifier Group' and name it something that employees will not interact with (e.g. do not use)
3. Set the 'Visibility' to 'Only Visible to Servers'
4. Create a 'Modifier' within the 'Modifier Group' and set the name to be the prep station that contains the ingredients (example: Sauté)
5. Select the "Default" checkbox to make it a default modifier
6. Set the 'Visibility' to "Hidden from Everyone"
7. Set the prep station for the Sauté Modifier option to the Sauté prep station via the Advanced Properties. As a result, when the Sauté Station fulfills their ticket, the other stations will see a checkmark next to 'Sauté,' indicating that the Sauté Station has completed their part of the item.

[Learn More: Prep Station Fulfillment, Customize Item/ Modifier Colors on KDS, Printed Tickets for Prep Station](#)

Course Firing

Toast's course firing is organized by course (e.g. appetizer, entree, dessert) and requires servers to send each course to the kitchen. Menu items are assigned a course and all items in the course are grouped together.

Additionally, Toast offers the option to select the 'Stay' button for each menu item being entered, which sends the other to the kitchen while staying on the table screen and items auto fire by creating individual kitchen tickets as they are entered.

Toast's 'Hold' button is used for items that are added to a check, but not ready to send to the kitchen. Servers use this if they are adding part of an order and would like to come back to make changes or add more items.

How does it work? When a server is ready to send an order to the kitchen, Toast asks which courses should be fired (e.g. appetizer, entree), the server selects the courses and sends; this process is manual for each course.

[Learn More: Course Firing Options](#)

Labor / Workforce Management

Toast's offers labor management tools including scheduling and access to comprehensive employee data (e.g. schedule, contact info) through optional partner integrations. Partner functionality includes: Break Management, HRIS, Overtime Management, Payroll, Reporting, Scheduling, Time Clock and Tips.

Labor Partners: Cohesion4Restaurants, Gratuity Solutions, KitchenSync, Dolce Software, Proliant, Peachworks, HotSchedules, 7shifts, Stratex and Crunchtime.

How does it work? By leveraging partner software, a restaurant can develop a schedule, import into Toast, and the system will enforce the schedule. Based on the schedule, servers will not be able to clock in early or out late without Manager permissions. This helps Managers track overtime as they have to approve servers clocking in/out outside of schedule.

Toast's reports offer metrics on workforce management:

- **Labor Report** - overview of hours worked, pay, tips, and time entries by employee.
- **Restaurant Summary** - overview of hours and pay based on the jobs added to the restaurant
- **Employee Summary** - breakdown of hours and pay for each employee; has the functionality to drill into time entries and labor related data, employee productivity, pooled tips, and hourly sales

[Learn More: Enforcing Scheduling/Time Clock Rules with Integration Partners, Labor Report Overview](#)

Take Out / Delivery

Take out and delivery are part of the Online Ordering Module. Managers can enable functionality for real-time and future orders. The 'Takeout Database' stores customer takeout data and enables detailed reporting specific to takeout.

How does it work? Online Ordering can be set up for Pick Up and Delivery online or via phone. Restaurants can set up delivery functionality and radius if they have the infrastructure to support delivery orders. Online Ordering integrates with the POS and orders are sent directly to the kitchen.

[Learn More: Configuring Takeout & Delivery, Online Ordering Set Up](#)

Menu Management

Toast's offers dynamic menu creation. Toast has the ability to simply update the menu in real-time with 'Quick Edit Mode' where you can add, order, rename and delete parts of your menu and all changes are published immediately via the cloud.

How does it work? To enter 'Quick Edit Mode' tap and hold any menu button and you will be based if you want to enter, select 'OK.' In 'Quick Edit Mode' you can add, delete, arrange, change price of items and modifiers, change button color, change name, and add SKU options. However, it does not offer the functionality to add, delete, or arrange new or existing menu groups, subgroups, and modifier groups.

[Learn More: Menu Overview, Menu Management, Quick Edit Mode](#)

Menu Modifiers

Toast offers the unique ability to apply menu modifiers to both a groups and individual items, which increases efficiency. In Toast, when a server finishes entering modifiers, the server needs to hit "done" to return to the main menu. Servers often require training to get used to the screen flow.

How does it work? 'Modifier Groups' contain 'Modifier Options' (e.g. Steak Temperature = Modifier Group; Rare, Medium, Well Done = Modifier Options). There are three levels when modifier groups can be applied: Group Level/Subgroup Level, which are parent Modifiers and Item Level, which enables changes to an item.

Modifiers are created in Toast's back-end and the restaurant can assign behavior to the modifier. For example, if you want the server to always ask the customer how they want their steak cooked you can select a 'Required' modifier to force the server to make a selection before moving to the next screen. Additional options include 'Optional Force Show,' which prompts the server to view the Modifier Group, but does not force a choice and 'Optional,' which does not pop up when the item is selected but is easily accessed as needed.

Learn More: Menu Modifiers and Groups

Recurring Menu Specials/ Happy Hour Menu

Menu items are either available or not available. For recurring day of the week specials customers can create specific specials as modifier groups. For Happy Hour specials customers can build a specific menu.

How does it work? Building a happy hour menu that duplicates the items offered and prices them as menu specific is the easiest way to support happy hour specials. To build this menu, create a new menu called 'Happy Hour' and copy the menu groups of items that should be offered and priced differently. Once copied enter the price editor and convert the appropriate menu groups to 'Menu-Specific Pricing.' Leveraging the 'Increase By' or 'Decrease By' fields the price can be changed by a dollar amount or percentage. To decrease a price enter as a negative value (e.g. -\$1.00, -20%). Lastly, in the advanced properties change the time and availability of the menu.

The original menu will remain available and servers will need to be trained to ring in the 'Happy Hour Menu' during the happy hour time period.

Learn More: Happy Hour Menus, Menu Copying, Price Editor

Discounts/Comps

Discounts, or Comps, function differently in Toast; you have the ability to configure discounts that allow an employee or manager to discount both items and checks based on percentages or dollar amounts.

Four Discount Types: Fixed, Combo, BOGO, and Open.

Discount reasons track how and why custom discounts are being used. There is an option to select permission levels and require a manager approval for specific discounts. Discounts can be configured to be available during specific dates and times.

How does it work?

- **Fixed Discount** - Deduct a specific dollar amount or percentage from an item or a check.
- **Combo Discount** - Customers can purchase items or groups of items at a specific price. With Combo Discounts require building the 'Combo Group.' Single-item combos can discount certain items/checks to a specific dollar value.

- **BOGO Discounts** - Customers can be offered a free item from one or many items purchased. To set up, choose if the eligible items can be any menu item or only specific items. After selecting the items needed to be bought, select which items a customer can get. Once you select your buy and get items you can set the value of the get in currency or percentage.
- **Open Discounts** - Users can deduct any dollar amount or percentage from a check; often requires manager approval.

Learn More: Creating Custom Discounts, Discount Reasons to Custom Discounts, Fixed Discounts, Combo Discount, BOGO Discounts, Open Discounts, Discount Availability

Reporting

With Toast, access your reports from any internet-connected device at any time, from anywhere. The data can be filtered and exported; however, Toast custom reports and filters cannot be saved or easily printed.

How does it work? The reporting and analytics platform offer real-time data and reporting. Key reports include the 'Sales Summary Report' which is a snapshot report of the restaurant's sales, menu, labor, deposits and operations and 'Labor Report' which provides vital information on all labor related items including hours worked, pay, tips and time entries.

The analytics platform provides the ability to run historical reports, and analyze trends over sales and menu data. Within the analytics platform there are location vs. location comparative reports and labor data. The 'Sales Analytics' report provides key sales metrics, a breakdown of sales by day, day of the week and time of day, payment types and sales categories.

Learn More: Sales Report, Labor Report, Analytics Platform, Sales Analytics

Key Terms to Know

Toast	Definition
Toast Groups	Sub Menu
Order Modes	Dining Options
Comping	Discounts
Shift Review	Server Check Out
Gratuities	Service Charges
House	Petty cash (not in cash drawer)
Pay Out	Cash Out
Cash Drop	Move cash from drawer to house

What you won't find in Toast...

Toast offers many benefits; however there are a few features Toast does not offer as a result of its focus on cloud software, ease of use, lower price points and strong customer service.

- Employee Comp Cards
- Cashier Screen
- KDS Recipe Display
- KDS Recall Last Ticket, Recall Ticket by List
- VIP / Rush Orders
- Property Management System
- Payment Extensibility Tool

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