



Toast Business Setup: What to Expect

Complete Toast Business Setup to get started on ToastWeb and begin your onboarding and installation

Login to Toast Web

Owner Authentication

Legal Validation

Connect Banking

Checklist Tasks

Your Tasks to Complete Business Setup

Pre-work

When you sign your contract, provide:

- Restaurant address
- Email address of the person who will login to Toast Web

Login to Toast Web

- An activation email with the subject "Activate Your Toast Account" is sent to this email address within 48 business hours of signing contract. Log in and get started!

Business Contacts

- Complete Business Contacts prompt (you can also add and update contacts later in Toast Web)

Add EIN (tax ID number)

- Add business EIN (Employer Identification Number) & legal name exactly as registered with the IRS
- Click "submit" to validate EIN and legal name

Add Business Information

- Verify information associated with your legal business entity

Identify Business Owners

- Validate name, SSN, and DOB of business owners with more than 25% stake

Connect Bank Account

- Connect the banking account you will use for software subscription fees; this account will also be used to deposit funds earned through credit card sales
- Search for your bank and log in using your bank's standard login criteria

Continue Setup Checklist

- Continue your onboarding and installation checklist, customized to your unique Toast Platform

Tips for Success

- If you haven't received your Activation Email after 3 business days, contact your Toast team (check spam folder!)
- If you have already set up a Toast Web login, sign in with the same credentials to see your new account

- Every field must be completed correctly to submit your information
- Have your IRS CP575 handy to double check that EIN and legal name match exactly with IRS registered information

- Every field must be completed to submit your information
- Double check your data entry: incorrect data entry is the most common cause of error messages!

- Have your standard bank login information on hand
- Don't see your bank? Use the "We can help" link to message your Toast team and get an ACH form

- Follow the checklist step-by-step onboarding and installation instructions