



Toast Quick Setup Guide

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Quick Restaurant Setup

This guide explains how to make the basic configuration of your Toast POS system match the workflow of your restaurant.

This guide does not cover menu configuration, reporting, or more complicated POS configuration. It will take approximately two hours to complete the procedures in this guide. If you need more help, see Toast Central [<https://central.toasttab.com/s/>].

Before getting started, make sure you can sign into the Toast administration back-end. If you need help signing in, get help at Toast Central [<https://central.toasttab.com/s/>].

The following sections provide more information about setting up your Toast restaurant.

- Marketing Setup (page 1)
- Kitchen and Dining Room Setup (page 3)
- Jobs and Employees Setup (page 7)
- Payments Setup (page 8)

Marketing Setup

Marketing setup configures the information about your restaurant that you share with restaurant guests

- Restaurant Info (page 2)
- Hours and Services (page 2)

- Receipts (page 3)

Restaurant Info

You can add the information about your restaurant that you want to send to guests on the **Marketing > Restaurant Info** page of the back-end.

All Toast restaurants have a Toast web page. You can find the web address of the Toast web page for your restaurant in the **Toast Tab Page** control on the **Restaurant Info** page. The information about your restaurant that you include in the restaurant info configuration section is shown on your Toast restaurant web page.

Enter the following restaurant information:

Restaurant Information

- **Restaurant Image** – The square image at the top of the page. The minimum size is 180 pixels in height and width.
- **Banner Image** – The banner image at the top (960 pixels wide minimum).
- **Restaurant Description** – A brief paragraph about the restaurant concept. Include messaging that you want associated with your business. For example, information about cuisine, atmosphere, etc.
- **Website URL** – The web address of your restaurant's web site.
- **Facebook Page URL** – The web address of your restaurant's Facebook™ page (Optional).
- **Twitter Account** – The web address of your restaurant's Twitter™ page (Optional).
- **Toast Tab Page** – The web address of your Toast restaurant web page. Your customers will see this when they visit the Toast online ordering page.

Hours and Services

You can add information about the days of the week and times of day that your restaurant is open, and what types of service, or meals, you offer on the **Marketing > Restaurant Hours / Services** page of the back-end.

In the **Services** section, add the meals that you offer (for example, lunch, dinner, or late night).

In the **Day Schedules** section, add your restaurant's hours of operation for each meal on each day type, for example weekdays and weekends. You can add more day types if you need to.

In the **Weekly Schedule** section, choose the days of the calendar week that match the day types that you configured in the **Day Schedules** section. For example, you might choose the weekend day type for **Sunday** and **Saturday**, and **Closed** for Mondays.

Receipts

You can customize the header and footer of the payment receipts for your restaurants on the **Marketing > Receipt Setup** page of the back-end. You can add your company logo, address, social media pages, or a fun message.

Kitchen and Dining Room Setup

Kitchen and dining room setup builds your floor plan and configures your restaurant workflow in the POS.

- Service Areas (page 3)
- Dining Room Tables (page 4)
- Courses (page 5)
- Prep Stations (page 5)
- Dining Options (page 6)
- Printers (page 6)

Service Areas

On the **Kitchen/Dining Room > Service Areas** page of the back-end, configure service areas for restaurants that provide table service. A service area represents a section of your physical restaurant space. If you plan to use table service mode, you must configure at least one service area. For large full service restaurants, service areas might include patios, bars, or private dining rooms.

For quick service restaurants, you can use quick order mode which does not require a service area.

If you do not have staff responsible for serving tables, you can skip the remainder of this section.

Once you create a service area, you can enter table layouts and configure service area settings (instructions in the section below). You also have the ability to filter Toast reports based on service area. For each service area, you will be able to select:

- **Primary?** – The primary service area is the default layout employees see when they sign into the Toast POS device.
- **Auto-apply Gratuity?** – Allows you to apply auto-gratuities or service charges based on the party size. For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Setup-Auto-Gratuity>].

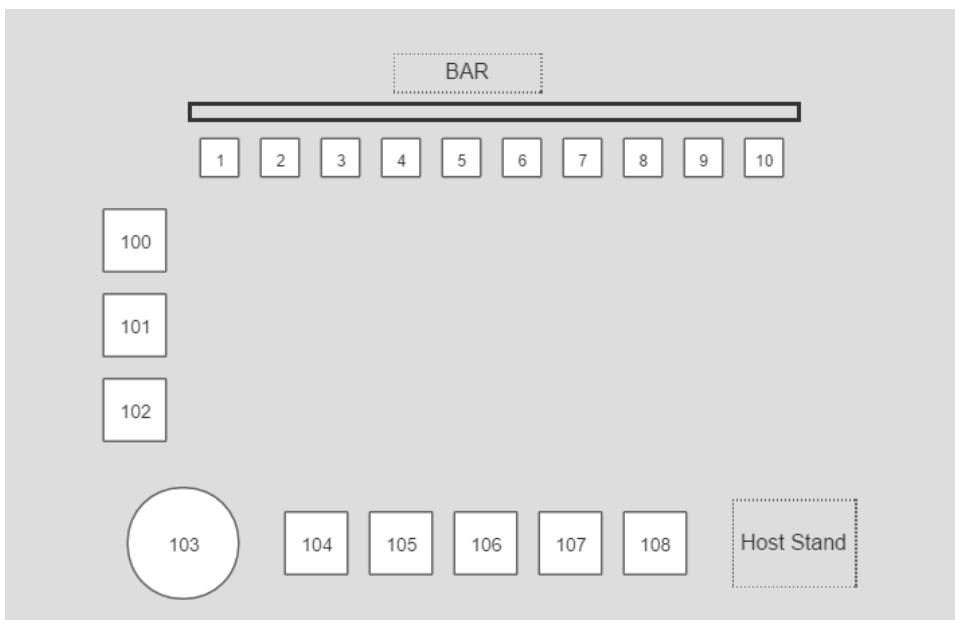
Dining Room Tables

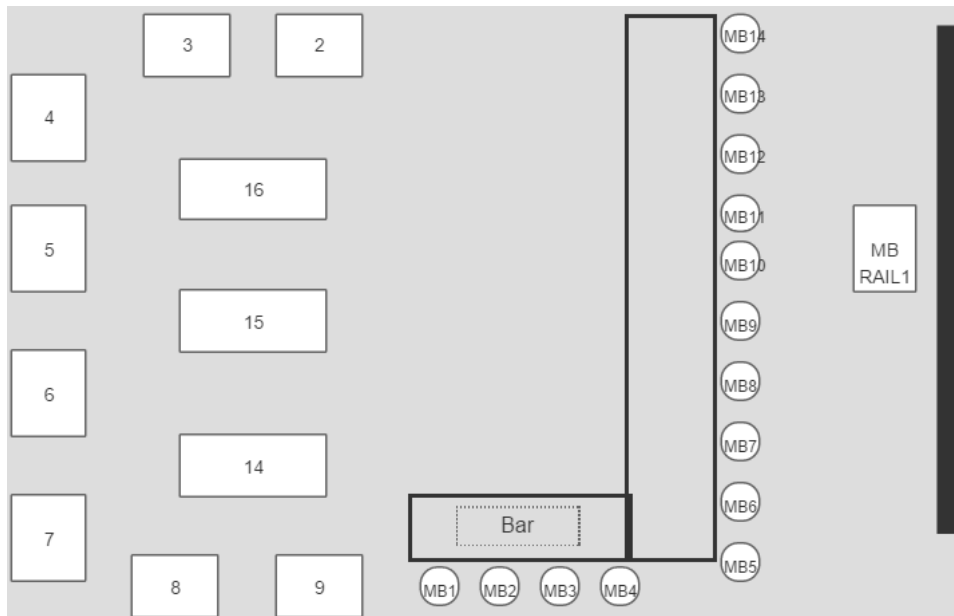
If you do not have staff responsible for serving tables, you can skip this section.

On the **Kitchen/Dining Room > Tables** page of the back-end, enter your table or bar layouts.

Configuring the layouts takes time, but it is essential for staff efficiency.

Here are some examples of table layouts:





Courses

On the **Kitchen/Dining Room > Courses** page of the back-end, configure courses to organize menu items and allow servers to select when items are fired to the kitchen.

You can also use courses to group menu items on kitchen receipts or on the KDS (Kitchen Display Screen), even if the servers are not controlling the flow of service. The nature of your restaurant operation (specifically, how you want the kitchen staff to receive orders) will determine how you configure courses in the POS.

If you do not have staff responsible for serving tables, you should delete any courses that are configured in the default restaurant setup.

For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Course-Firing-Options>].

Prep Stations

On the **Kitchen/Dining Room > Prep Stations** page of the back-end, configure the prep stations to direct menu items to specific ticket printers or KDS devices. Prep stations control which kitchen employees prepare specific menu items.

For example, if one kitchen station is responsible for salad preparation, you can configure a “salad” prep station and then assign all salad items on the menu to the “salad” prep

station. After you configure that workflow, each salad order will appear on KDS devices or print to the station that is setup to display salad orders.

Most restaurants have at least one prep station. There are certain businesses, like bakeries or food trucks, where there is no kitchen and therefore no need for a prep station.

For more detailed information about configuring prep stations, see this article at Toast Central [<https://central.toasttab.com/s/article/Kitchen-Setup-Overview-1492745817513>].

Dining Options

On the **Kitchen/Dining Room > Dining Options** page of the back-end, customize how guests purchase food from your restaurant. For example, dining options include takeout, online ordering, and delivery.

If you do not offer take-out, online ordering, or delivery to guests, you can omit those dining options, which will leave **Dine In** as the only option. You can then skip the rest of this section.

Dining options include:

- **Dine In** – Allows servers to directly enter orders.
- **Take Out** – Forces a server to enter a phone number and select or create a guest record before entering an order.
- **Delivery** – Forces a server to enter a phone number and select or create a guest record before entering an order. Since this is a delivery workflow, a guest's full address is required.

For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Dining-Options-1492794310377>].

Printers

On the **Kitchen/Dining Room > Printers** page of the back-end, enter information about the printers you will use at your restaurant. You add printer information for both payment receipt printers and kitchen printers.

Make sure you name the printers in a way that will make it easy to match printer configuration in the POS with the physical printers in your restaurant.

You include the IP address of a printer when you add its information. Printers are preconfigured with an IP address and that IP address is shown on a label attached to the printer.

For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Creating-a-New-Printer-1492786557918>].

Jobs and Employees Setup

Jobs and employees setup builds the job roles at your restaurant, assign each role permissions, and create users for your employees. After you create jobs and employees, you assign specific employees to jobs. The employees inherit the permissions for the jobs you assign. You can override the permissions for an employee if you need to.

- Jobs (page 7)
- Employees (page 8)

Jobs

On the **Labor > Jobs** page of the back-end, enter information about the types of jobs your restaurant employees do.

There are several default job types preconfigured for your restaurant, but if they do not match your restaurant workflow, you can update the job titles or delete them entirely. From there, you can add any other jobs you need.

Common job types include: cashier, server, bartender, hostess, busser, dishwasher, driver, prep cook, line cook, kitchen manager, FOH manager, bar manager, general manager, pastry chef, sous chef, and chef.

Consider the following questions when you deciding what jobs to create for your restaurant:

- Should employees in this job have different access permissions than other jobs in the restaurant?
- Do employees in this job have different standard pay rates from other jobs in the restaurant?

- Do you want labor reports to summarize hours and pay by this job type?

Employees

On the **Labor > Employees** page of the back-end, enter information about the people who work at your restaurant.

You can quickly enter and remove employees from the POS. When you add an employee, you assign that employee to one of the jobs you created (create jobs first for this reason). For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Adding-Employees>].

Payments Setup

Payments setup controls how the POS handles guest payments at your restaurant.

- Other Payment Options (page 8)
- Discounts (page 9)
- Void Reasons (page 9)
- Service Charges (page 9)
- Tax Rates (page 10)

Other Payment Options

On the **Payments > Other Payment Options** page of the back-end, add payment types that are not cash or credit cards.

Other payment options allow your restaurant to accept alternative payments that are not cash or credit cards. LevelUp™, or a non-cash option such as GrubHub™, are two examples of other payment options you might consider adding. Once you add a new payment option, you can configure it according to your workflow.

For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Other-Payment-Options-Types-1492810275982>].

Discounts

On the **Payments > Discounts** page of the back-end, add the discounts your restaurant offers for promotions and guest relations.

Your restaurant is preconfigured with the several commonly-used discounts. You can change the default discounts and add your own discounts. For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Discounts-2-0-Creating-Custom-Discounts>].

Void Reasons

On the **Payments > Void Reasons** page of the back-end, configure categorizations of the reasons that employees cancel or void orders. Void reasons explain why the order was canceled.

Example void reasons include:

- Server error
- Guest changed mind
- Guest canceled order

Service Charges

On the **Payments > Service Charges** page of the back-end, create the service charges that you apply at your restaurant, and choose whether the service charge is assigned to the check owner as a gratuity.

There are two ways of assigning the service charge amount:

- Assign the fee to the owner of the check, as a gratuity.
- Assign the fee to the restaurant.

For more information, see this article at Toast Central [<https://central.toasttab.com/s/article/Configuring-Service-Charges-1492800294511>].

Tax Rates

On the **Payments > Tax Rates** page of the back-end, configure the types of taxes that apply to sales at your restaurant, and their rates. You apply tax rates to menus, menu groups, or individual items.

Typically, you will need to configure two tax rates for your restaurant: state tax and local tax. Other types of taxes might apply to your restaurant. For example, additional tax rates might include: retail tax, county tax, or lodging tax. Before you begin using the POS for live restaurant sales, you must assign appropriate tax rates to each item.

Important Toast is not responsible for improperly configured tax rates.