



# Product Guide



# Table of Contents

Click to jump to each content section

## Manager

[Find Checks](#)  
[Issue Refund](#)  
[Transfer Gift Card](#)  
[Import Gift Cards](#)  
[Archive Test Orders](#)  
[Manager Log](#)  
[Send Notifications](#)  
[Publish Configuration\\*](#)

## Labor

[Jobs](#)  
- [Create New Job](#)  
- [Permissions Overview](#)  
- [Quick Add Jobs](#)  
[Employees](#)  
- [Invite New User](#)  
- [Create New User](#)  
- [Quick Add Users](#)

## Marketing

[Restaurant Info](#)  
[Hours/Services](#)  
[Receipt Setup](#)  
[Rewards Program](#)

## Kitchen/Dining Room

[Kitchen Setup](#)  
[Service Areas](#)  
[Tables](#)  
[Courses\\*](#)  
[Prep Stations\\*](#)  
[Dining Options\\*](#)  
[Printers\\*](#)

## Payments

[Payment Options](#)  
[Other Payment Options\\*](#)  
[House Accounts](#)  
[Discounts\\*](#)  
[Void Reasons\\*](#)  
[Service Charges](#)  
[Tax Rates](#)

## Other Setup

[UI Options](#)  
[Sales Categories](#)  
[Revenue Centers](#)  
[Device Groups](#)  
[Pay Out Reasons\\*](#)  
[GL Accounts\\*](#)  
[Takeout/Delivery](#)  
[Online Ordering](#)

## Other Setup

[Manager Log Setup](#)  
[Notification Setup](#)  
[Restaurant Groups](#)  
[Financial Setup](#)  
[Contact Settings](#)  
[Data Exports](#)  
[Barcode Config](#)  
[Kiosk Setup](#)

## Additional Information

[2-Factor Authentication](#)  
[Master Menu Management](#)

Note: Sections marked with asterisks (\*) display distinct interfaces for multi-location organizations that have enabled Master Menu Management (MMM)



# Manager

Setting Name:	Find Checks
Location:	Manager/Find Checks
Description:	The Find Check function allows a user to find both open and closed checks using various different search options.
Example:	See below

Checks can be searched by Check Number, Check ID, Customer Information and Credit Card Last 4 Digits:

Find by Check Number

Find by ID

Find by Customer Info

Find by Credit Card

Advanced searches can also be performed to find checks in a specific date range or dollar amount, and can be filtered by employee:

Check Amount

\$  to \$

Employee

All Employees ▼

Check Date Range (start)

May 2016								
←	Su	Mo	Tu	We	Th	Fr	Sa	→
	24	25	26	27	28	29	30	
	1	2	3	4	5	6	7	
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	
	22	23	24	25	26	27	28	
	29	30	31	1	2	3	4	

Check Date Range (end)

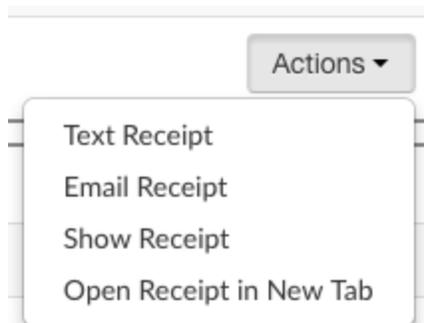
May 2016								
←	Su	Mo	Tu	We	Th	Fr	Sa	→
	24	25	26	27	28	29	30	
	1	2	3	4	5	6	7	
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	
	22	23	24	25	26	27	28	
	29	30	31	1	2	3	4	



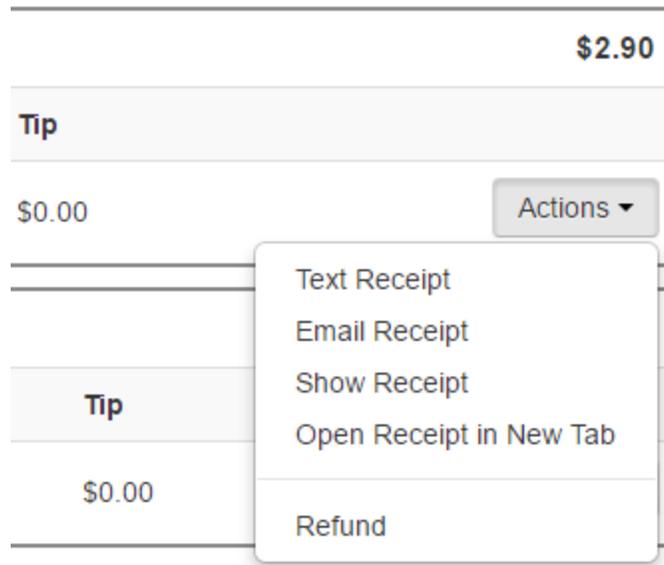
The search result will display details on one or more checks. Details on these checks can be viewed by selecting the check number:

#31 (Closed)	Selecting the check number opens additional details	5/18/2016 11:03 AM	\$10.90
Payment Type	Info	Subtotal	Tip
Cash	\$10.90 tendered	\$10.90	\$0.00
			Actions ▾

The following actions are also possible on closed checks:



In addition, credit card orders that have been batched from previous days can also be refunded using the Refund Payment function, which is available here:



Payment Details

<b>ID</b>	[REDACTED]
<b>Time</b>	5/20/2016 2:26 PM EDT
<b>Type</b>	Credit
<b>Subtotal Paid</b>	\$1.65
<b>Tip Paid</b>	\$0.00
<b>Total Paid</b>	\$1.65
<b>Card Number</b>	[REDACTED]
<b>Auth Code</b>	[REDACTED]
<b>Signature</b>	Paper Receipt

Refunded Subtotal  Cannot be greater than original subtotal

Refunded Tip  Cannot be greater than original tip amount

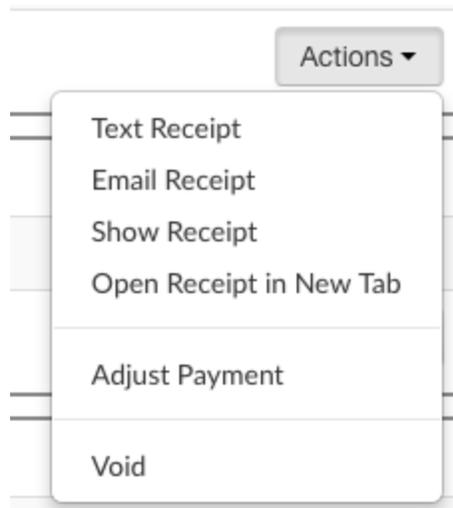
Total Refund **\$1.65**

Reason for Refund

[Process Refund](#)



If done on the same day, Adjust Payment and Void can also be performed:



Setting Name:	Issue Refund
Location:	Manager/Issue Refund
Description:	The Issue Refund function allows a user to issue an unlinked refund. An unlinked refund is for issuing refunds not directly tied to a previous credit card payment.
Example:	<p>A customer calls a restaurant and mentions to the manager that he/she visited the restaurant a week ago and did not receive good service. The manager is unable to find the check using the Find Checks function and determines that the check cannot be found. The manager decides to refund the cost of the meal but the initial payment has already been processed and the funds have settled. The manager asks the customer for his/her credit card information and uses the Issue refund function to refund the cost of the meal.</p> <p>Note that Issue Refund is also used in cases where the refund is processed on a card different from the original card used to process a payment.</p>

To issue a refund, enter the Refund Amount, Card Number, Card Expiration Date, Card Security Code and Reason For Refund. Then, select the Issue Refund button:

Refund Amount

Card Number

Card Expiration

Card Security Code

Reason for Refund

*This page is for issuing refunds **not** tied to a previous credit card payment. It is usually easier to use Find Checks and refund a previous payment. This may cause previous day's data to change. Please note that a confirmation email will be sent for each refund issued here and an audit log is kept.*



Setting Name:	Transfer Gift Card
Location:	Manager/Transfer Gift Card
Description:	The Transfer Gift Card function allows a user to transfer a balance from one gift card to another or combine a balance of two cards into one.  (Gift Cards constitute a Toast Add-on module)
Example:	A customer visits a restaurant and mentions that the magnetic stripe on his gift card does not work anymore. The cashier calls for the manager. The manager takes the old card, transfers the balance to a brand new card and give the new card back to the customer.

## Transfer Gift / Rewards Card

---

This will transfer the balance, points, and email registration from the old card to the new card

Old Card Number

Old Card Action

- Transfer balance to new card and deactivate
- Combine with new card

New Card Number

Next



Setting Name:	Import Gift Cards
Location:	Manager/Import Gift Cards
Description:	The Import Gift Cards function allows a user to import existing gift cards with balances and/or new gift cards so that they can be used with Toast  (Gift Cards are a Toast Add-on module)
Example:	See below

The import file should contain only two columns with no headers. The first column should contain the full gift card number and the second column should contain the card's cash balance. Please do not include any non-alphanumeric characters (@#\$\$%^&\*, etc).

This file **must** be in a **CSV file format**. No other file types like .xls, .xlsx, .xml, .doc will be accepted.

If the gift card file contains additional information such as Customer Name, Address, Phone, Email, City, State, Zip, Email, the Toast Support/Services team should be involved as it requires a more complicated import process.

In order to import gift card data, select the "Choose File" button and select the .csv file. Make sure that the "Active Card" checkbox is checked if active cards (cards with balances) are being imported. Finally, enter the user's email address, and select Validate:

Active cards  Active Cards are cards with existing cash balances. Check this box if this file contains cards with balance.

Upload CSV  No file chosen

Confirmation Email  The confirmation email will be sent to this address.



Setting Name:	Archive Test Orders
Location:	Manager/Archive Test Orders
Description:	<p>The Archive Test Orders function allows a user to delete a check that was tendered using Cash from the Toast system.</p> <p>This function is intended to allow users to delete a check that was entered into Toast by accident or during training.</p>
Example:	<p>The restaurant just hired a new cashier. The cashier is using the POS and rings in 1000 x Chicken Sandwiches by mistake. Not knowing what to do next, the cashier closes the check as a Cash transaction. The manager can use the Archive Test Orders function to remove the order with the 1000 Chicken Sandwiches from the POS.</p>

Please be advised that archiving a check will permanently remove it from the Toast system. If the payment was taken in a cash drawer, archiving the order will **not** update the drawer balance.

To use this function, choose the correct date and employee, and update the report. Click on the checkbox to select the checks that need to be archived and finally press the Archive button.

View 📄 Archive Test Orders ▼ for Today ▼ for All Employees ▼

Archive **Selected 1 orders.**

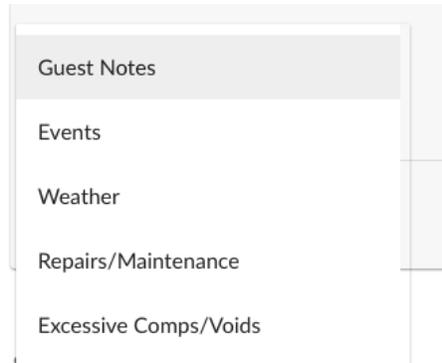
25 ▼ orders per page

Select All	Order #
<input checked="" type="checkbox"/>	31
<input type="checkbox"/>	30

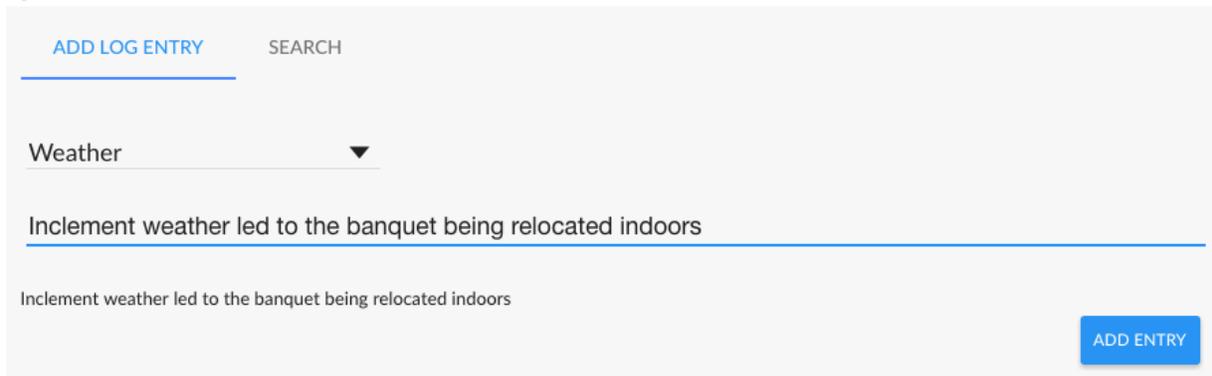


Setting Name:	Manager Log
Location:	Manager/Manager Log
Description:	The Manager log function allows a manager to add entries into a log book
Example:	See below

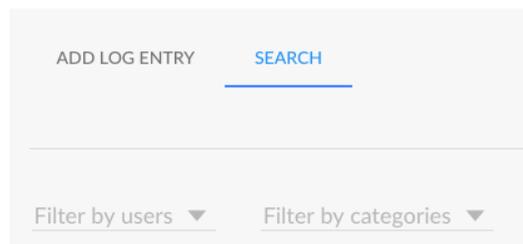
A manager can enter a log by first selecting a category from the dropdown:



And then typing in a note on the line below. Once complete, selecting Add Entry will save the entry in the logbook:



Previous entries can be looked up using the search function, which can be further filtered by users or by categories:



The Previous Day button allows a manager to quickly access entries made the previous day



Setting Name:	Send Notifications
Location:	Manager/Send Notifications
Description:	<p>The Send Notification functions allows a user to send messages to the POS stations and tablets. Messages can be sent to all devices in a restaurant or filtered by Device Type and/or Job Type.</p> <p>The messages will appear on the Toast devices when a user clocks in and/or enters his/her PIN to access the POS.</p>
Example:	A restaurant wants to make sure that all the employees are aware of the special of the day. The manager can send a notification to all the devices with a message that explains the special of the day. This message will appear on the POS screen when an employee punches in or enter his/her PIN to access the POS.

## New Notification

Restaurant(s)

Device Type(s)  optional

Job(s)  optional

Message



Setting Name:	Publish Config
Location:	Manager/Publish Config
Description:	<p>The Publish Config functions allows a user to publish any changes/updates made to the Toast system and configuration.</p> <p>Anytime changes are made to the Toast system e.g. a menu item is added, price of an item is changed, a receipt property is changed, these changes have to be published in order to be effective on the POS stations and tablets.</p> <p>The Publish Config function also keeps an audit trail of all the users who have made changes to the system.</p> <p>There are two types of publishes that are logged: Full and Quick Edit.</p> <p>A Full publish is done when a change is made on the Toast Admin Website and a Quick Edit publish is done when a change is made using the Quick Edit feature on the POS stations or tablets.</p>
Example:	See below

Publish Changes
Changes are ready to be published

Previous Config Changes Showing 1 through 20 of 6559 
[Previous](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[Next](#)

Date	Publisher	Type
5/18/2016 11:30 AM EDT	Kevin Sullivan	Quick Edit
5/18/2016 11:03 AM EDT	Jacleen Casinelli	Quick Edit
5/18/2016 9:33 AM EDT	Derek Domino	Quick Edit
5/17/2016 5:53 PM EDT	David Quinones	Full

Selecting the Publish Changes at the button will publish changes after a system edit is performed.

If a multi-location restaurant organization is using Master Menu Management (MMM), the interface looks as follows. Notice that changes can be published selectively at specific restaurants using a Publish button located to the right:

Publish Selected Restaurants
Changes are ready to be published

<input checked="" type="checkbox"/>	Location	Last Published	
<input checked="" type="checkbox"/>	Toast Bar & Lounge	5/19/16 11:20 AM EDT	<span style="border: 2px solid orange; background-color: #D9E1F2; padding: 2px 10px; border-radius: 3px;">Publish</span>

Previous Config Changes Showing 1 through 20 of 6631 
[Previous](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[Next](#)

Location	Date	Publisher	Type
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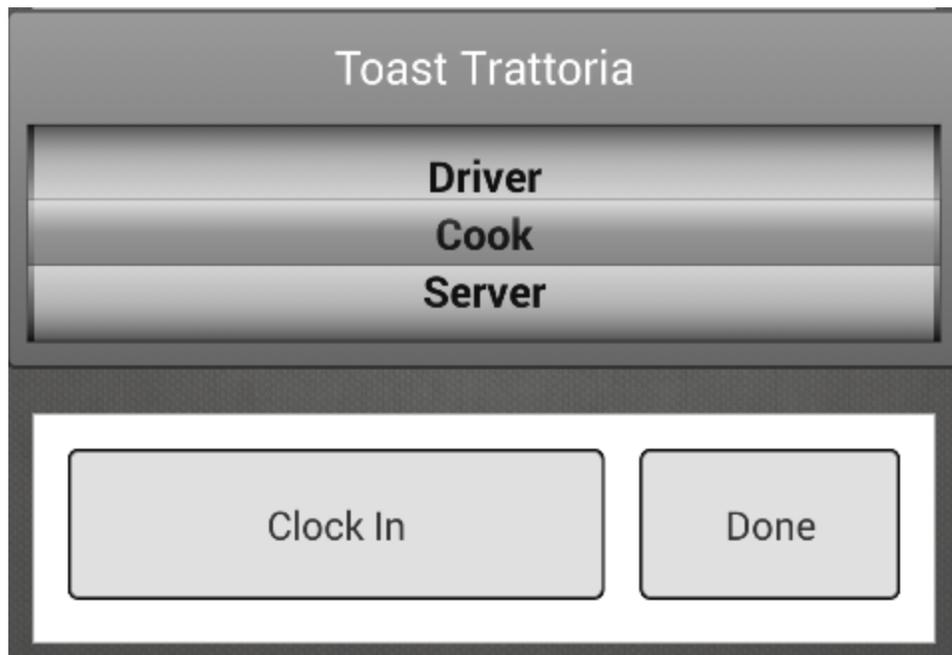


# Labor

Setting Name:	Jobs
Location:	Labor/Jobs
Description:	The Jobs function allows a user to configure jobs for employees at a restaurant (i.e. what they clock in as). Examples include Busser, Cook, Driver, Server, Manager, etc.
Example:	There are many possible scenarios, read below for additional information

## Front-End:

Immediately after entering the passcode, the jobs that have been configured for that user are shown as follows:



There are two ways to create a job  
[Create a New Job](#) and [Quick Add Jobs](#)

## Jobs

+ Add Job ▾

Create New Job

Quick Add Jobs

### Create New Job allows a user to build a new job from scratch

There are two parts to this process:

#### 1) Configuring the 7 core job settings

- a) Job Title
- b) Job Code
- c) Pay Basis (hourly or salary)
- d) Default Pay
- e) Tipped
  - i) Determines if the user is required to enter cash tips at closing as a part of their Shift Review
- f) Cashier
  - i) Determines if the user has access to a cash drawer
- g) Driver
  - i) Determines if the user can be dispatched to perform deliveries

#### 2) Configuring user permissions

Permissions are settings that determine whether or not users have access to various functionality in the system. There are four main buckets of permissions:

- a) POS Access
  - i) The most basic access, appropriate for servers, bartenders, and any users taking orders from customers
- b) Manager
  - i) Appropriate for restaurant managers, who need to approve discounts, adjust rewards and gift card settings, approve voids and refunds, control shift reviews, end of day closeout, and cash drawer balances, among others
- c) Restaurant Admin
  - i) Appropriate for restaurant administrators who need access to the Toast Admin Website for reports, the ability to edit menus, restaurant information, as well as job and employee configurations
- d) Account Admin
  - i) Appropriate for accountants, owners, and others who need access to the restaurant's financial data



## So what are some examples of permissions for certain jobs?

**Bussers, Expeditors, Cooks** - No permissions necessary - these users only need to clock in and clock out. In other words, nothing needs to be checked under Default User Permissions:

Default User Permissions

Permission	Enabled?
POS Access	<input checked="" type="checkbox"/>
Table Service	<input checked="" type="checkbox"/>
Quick Order	<input checked="" type="checkbox"/>
Ticket Display Screen	<input checked="" type="checkbox"/>
Payment Terminal	<input checked="" type="checkbox"/>
Delivery	<input checked="" type="checkbox"/>
Pending Orders	<input checked="" type="checkbox"/>
Cash Drawer Access	<input checked="" type="checkbox"/>
View Other Users's Orders	<input checked="" type="checkbox"/>
Edit Other User's Orders	<input checked="" type="checkbox"/>
Add / Update Service Charges	<input checked="" type="checkbox"/>
My Reports 	<input checked="" type="checkbox"/>
Shift Review Sales Data 	<input checked="" type="checkbox"/>
No Sale	<input checked="" type="checkbox"/>
Key in Credit Cards	<input checked="" type="checkbox"/>
Offline Credit Cards	<input checked="" type="checkbox"/>
Change Table	<input checked="" type="checkbox"/>
Change Server	<input checked="" type="checkbox"/>

**Dummy Account for Kitchen Display**- Toast recommends creating a dummy user and enabling the Ticket Display Screen permission to ensure that any KDSs on site are not reset with users clocking in or out.

Default User Permissions

Permission	Enabled?
POS Access	<input checked="" type="checkbox"/>
Table Service	<input type="checkbox"/>
Quick Order	<input type="checkbox"/>
Ticket Display Screen	<input checked="" type="checkbox"/>
Payment Terminal	<input type="checkbox"/>



**Server/Bartender** - Depending on the restaurant, ensure that the core job settings are configured correctly for tipped and cashier:

Tipped?	<input checked="" type="checkbox"/> Yes. This employee must enter cash tips at closing.
	<input checked="" type="checkbox"/> No tips need to be entered at closing.
Cashier?	<input checked="" type="checkbox"/> Yes
	<input checked="" type="checkbox"/> No

Keep in mind that anyone configured as a cashier will be forced to select a cash drawer upon clocking in if the following setting (under UI Options -> Shift Review/Closeout) is set to required:

Cash Drawer Lockdown	Required Cash Drawer Lockdown must also grant Cashiers permissions for Cash Drawer Access and Cash Management (Blind or Full)
	<input checked="" type="checkbox"/> Required - anyone clocked into a CASHIER job will be required to lock the drawer
	<input checked="" type="checkbox"/> Optional

These users should have all permissions enabled under POS Access (which can easily be done by selecting the check icon next to POS Access). Be sure to review each permission before enabling:

POS Access	<input checked="" type="checkbox"/>
------------	-------------------------------------

**Manager** - Depending on the restaurant, these users may need to have all permissions enabled under POS Access as well as Manager. Be sure to review each permission before enabling:

POS Access	<input checked="" type="checkbox"/>
Manager	<input checked="" type="checkbox"/>

**Administrator** - Depending on the restaurant, these users may need to have all permissions enabled under POS Access, Manager, and Restaurant Admin. Be sure to review each permission before enabling:

POS Access	<input checked="" type="checkbox"/>
Manager	<input checked="" type="checkbox"/>
Restaurant Admin	<input checked="" type="checkbox"/>



**Accountant/Owner** - Depending on the restaurant, these users should have all permissions enabled under Account Admin:



## Permissions Overview

### POS Access

Permission	Description
Table Service	Allows user to access Table Service mode For checks assigned to a table
Quick Order	Allows user to access Quick Order mode For checks not assigned to a table Often used in bars or for take-out orders
Ticket Display Screen	Allows user to access Ticket Display Screen Also referred to as Kitchen Display Screen
Payment Terminal	Allows user to access Payment Terminal mode Displays all checks for easy access for payments
Delivery	Allows user to access Delivery mode Utilized for dispatching and fulfilling delivery orders
Pending Orders	Allows user to access Pending Orders mode, which shows future (scheduled) and pending (awaiting approval) orders
Cash Drawer Access	Allows user access to the cash drawer, assuming cash drawer is not locked down to another user No cash drawer access results in cash tender being "Cash In Hand"
View Other Users' Orders	Grants user access to view other users' orders If not enabled, user is limited to viewing his/her own orders
Edit Other User's Orders	Allows user to edit (add items, void, discount, etc) other users' orders Requires "View Other Users' Orders" permission



Add/Update Service Charges	Allows user to add or update service charges (such as delivery or gratuity) to a check
My Reports	Allows user access to his/her individual sales report and time entries report, both on the Toast app and the Toast Admin Website
Shift Review Sales Data	Allows user to view their detailed sales and payments data during the shift review process
No Sale	Allows user to perform a "No Sale" (open the cash drawer without taking a cash payment)
Key In Credit Cards	Allows user to manually key in credit cards (in the event a card is not swiping properly)
Offline Credit Cards	Allows user to take credit card payments during offline periods (when authorization isn't guaranteed until internet connectivity is restored)
Change Table	Allows user to change a check's table assignment
Change Server	Allows user to change a check's server assignment (if they aren't allowed to edit other users' checks, they may still change ownership of their own checks to another server)



## Manager

Permission	Description
Discounts	Allows user to apply discounts to items and checks (A discount may also be set to "Any User", which allows users without this permission to still apply them)
Transfer/Rewards Adjustment	Allows user to transfer rewards balances between different rewards accounts and make rewards balance adjustments to rewards accounts
Gift Cards Adjustment	Allows user to make gift card balance adjustments
Void Items/Orders	Allows user to void items or orders
Void/Refund Payments	Allows user to void credit card payments or refund cash payments from the same day prior to batching
Unlinked Refunds	Allows user to process an unlinked refund (may be regarded as a payout to a user) "Unlinked" refers to a refund not associated to a previous check <u>On Toast Admin Website:</u> Manager -> Issue Refunds
Edit Sent Items	Allows user to edit items that have already been sent to the kitchen or bar
Other Payment Types	Allows user to process other types of payments (not credit card or cash), such as payments through checks, GrubHub, or gift cards not tracked through Toast POS
Shift Review	Allows user to view every other users' shift review Not to be confused with the individual shift review which is accessible independent of a user permission <u>On Toast app:</u> Manager Activities -> Shift Review
Negative Declared Tips	Allows user to declare a negative cash tip



	Used in instances where a server may have negative tips after adjusting for tip shares or tip pools
Edit Time Entries	Allows user to access and edit other users' time entries <u>On Toast app</u> : Manager Activities -> Time Cards
Close Out Day	Allows user to 1) view any unpaid or unclosed checks restaurant-wide, 2) view users still clocked-in, 3) view any open drawers 4) batch out credit card payments, and 5) print out Z-reports <u>On Toast app</u> : Manager Activities -> Close Out Day
Cash Management (Blind)	Allows user to access "Manager Activities - Cash Management" Will <b>not</b> display the current balance of the drawers <u>On Toast app</u> : Manager Activities-> Cash Management
Cash Management (Full)	Allows user to access "Manager Activities - Cash Management" <b>Does</b> display the current balance of the drawers <u>On Toast app</u> : Manager Activities-> Cash Management
Cash Drawer Lockdown (Override)	Allows user to access a cash drawer even if it is assigned to a different user
Large Cash Over/Under	Allows user to input or approve a large cash over/under while closing out a drawer (Threshold set in UI Options -> Closeout Over/Under Max)
Adjust Cash Drawer Start Balance	Allows user to adjust the starting balance of a cash drawer <u>On Toast app</u> : Manager Activities -> Cash Management
Pay Out	Allows user ability to perform a payout from the Toast app <u>On Toast app</u> : Manager Activities -> Pay Out



Find Checks	<p>Allows user to access the Find Checks feature both on the Toast app and the Toast Admin Website</p> <p>Looks up historical checks from previous days and grants user ability to process refunds on those checks</p>
Register Swipe Cards	<p>Allows user access to register swipe cards for employees</p> <p><u>On Toast app</u>: Manager Activities -&gt; Register Swipe Cards</p>
Open Items	Allows user to add open items to a check
Log Book	<p>Allows user to access the Log Book on the Toast Admin Website</p> <p>This feature must be enabled by a Toast support specialist</p>
Send Notifications	Allows user to send notifications to employees through the Toast Admin Website



## Restaurant Admin

Permission	Description
Sales Reports	Allows user to access the sales reports both on the Toast app and the Toast Admin Website
Menu Reports/Menusphere	Allows user to access the menu reports both on the Toast app and the Toast Admin Website, and the Menusphere inventory module on the latter
Labor Reports	Allows user to access the labor reports both on the Toast app and the Toast Admin Website
Gift/Rewards Card Reports	Allows user to access the gift / rewards card reports on the Toast Admin Website
Quick Edit Menu	Allows user to access the quick edit mode on the Toast app to make menu changes
Edit Full Menu	Allows user to access the full menu editor on the Toast Admin Website to make menu changes
Tables	Allows user to access the table editor on the Toast Admin Website to change and modify the table layouts for service areas
Marketing Info	Allows user to access the Marketing section on the Toast Admin Website ("Restaurant Info," "Hours / Services," "Receipt Setup," and "Rewards Program")
Employee Info	Allows user to access and edit employee information <u>On Toast Admin Website:</u> Labor -> Employees
Employee Jobs & Wages	Allows user to set jobs and wages for employees
POS Setup	Allows user to access on the Toast Admin Website: "Kitchen Setup," "Service Areas," "Courses," "Prep Stations," "Dining Options," "Printers," "Payment Options," "Other Payment Options," "Discounts," "Void Reasons," "Service Charges," "Tax Rates," "UI Options," "Sales Categories," "Revenue Centers," "GL Accounts," "Takeout / Delivery," "Online Ordering," "Notification Setup," and "Restaurant Groups"



House Accounts	Allows user to access house accounts on the Toast Admin Website This grants the user permission to create new accounts, edit existing accounts, create invoices, and balance house accounts
Edit Historical Data	Enables the user to edit certain historical information including time entries for previous shifts Labor Reports must also be enabled as a user permission
Customer Reports	Allows user to access the customer reports on the Toast Admin Website

### Account Admin

Permission	Description
Financial Accounts	Allows user to access the financial accounts configured with Toast
User Permissions	Allows user to edit employee user permissions
Data Export Config	Allows user to access Other Setup -> Data Exports tool on the Toast Admin Website
Franchise Fees	Allows user to set up franchise fees on the Toast Admin Website



Quick Add Jobs allows a user to build multiple jobs and rapidly configure only the 7 core job settings for each one:

Job Title	Job Code	Pay Basis	Default Pay	Tipped?	Cashier?	Driver?	
<input type="text" value="Job Title"/>	<input type="text" value="Job Code"/>	hourly ▾	\$ Default Pay	✓	✓	✓	🗑️
<input type="text" value="Job Title"/>	<input type="text" value="Job Code"/>	hourly ▾	\$ Default Pay	✓	✓	✓	🗑️
<input type="text" value="Job Title"/>	<input type="text" value="Job Code"/>	hourly ▾	\$ Default Pay	✓	✓	✓	🗑️

Once the jobs are created, they will appear under Jobs, and the appropriate permissions have to be set just as is the case when a new job is created

## Jobs

Job Title	Job Code	Pay Basis	Default Pay
Cook		salary	\$30,000.00
Manager	Click into each job to configure permissions		\$15.00
Driver		hourly	\$12.00
Server		hourly	\$7.50
Cashier		hourly	\$10.00

### A note on overriding permissions:

Toast best practices dictate that permissions always be configured at the job level. When a new employee joins a restaurant, assigning them the appropriate job automatically affords them the permissions that are configured with that job.

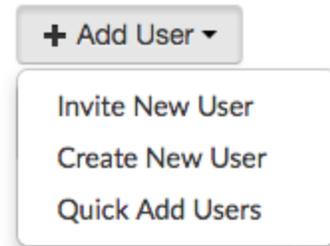
An admin can always override the specific permissions an employee inherits from the job assigned. Overrides should always be done at the employee level. More information on this can be found in the section below.



Setting Name:	Employees
Location:	Labor/Employees
Description:	The Employees function allows a user to configure employee profiles for individuals who work the restaurant
Example:	There are many possible scenarios, read below for additional information

There are three ways to create an employee:

- [Invite New User](#)
- [Create New User](#)
- [Quick Add Users](#)



## Invite New User

This allows a user to email a new employee an invitation, which includes a link for that person to configure his or her settings on the Toast Admin Website. As a result, this option should only be used to create employees who should have access to the Toast Admin Website.

The first setting to configure is the email address, which is required:

### How it works...

An invitation will be sent to the given email address. The user will be able to log in to this website to enter their user information and will be assigned the job and permissions specified below.

Email \*

Employee ID  This is the id for external systems (like payroll).



The next setting to configure is the job. This employee will inherit the permissions from the job that is selected:

**Jobs** Select each job applicable to this user. [Hide Wages](#)

Job Title	Default Wage	Wage Override
<input type="checkbox"/> Cook	\$ 30,000.00	\$
<input checked="" type="checkbox"/> Manager	\$ 15.00	\$
<input type="checkbox"/> Driver	\$ 12.00	\$
<input type="checkbox"/> Server	\$ 7.50	\$
<input type="checkbox"/> Cashier	\$ 10.00	\$

[Edit Jobs](#)

Once the job is selected, the user can scroll down and choose which permissions should be overridden, if any, for this specific employee. Checking/unchecking the green checkmark enables/disables the selected permission. This is how it would look:

Open Items	<input type="button" value="Inherit"/> <input checked="" type="button" value="Override"/>	<input checked="" type="checkbox"/>
<b>Select Override to override an inherited permission</b>		
Open Items	<input type="button" value="Inherit"/> <input type="button" value="Override"/>	<input checked="" type="checkbox"/>
<b>Then uncheck the check mark to deactivate this permission for this employee</b>		
Open Items	<input type="button" value="Inherit"/> <input type="button" value="Override"/>	<input type="checkbox"/>
<b>This permission has been overridden successfully and is deactivated for this employee</b>		

Employees that are invited will appear here under the Invited Employees tab

[Home](#) / Employees

[+ Add User](#)

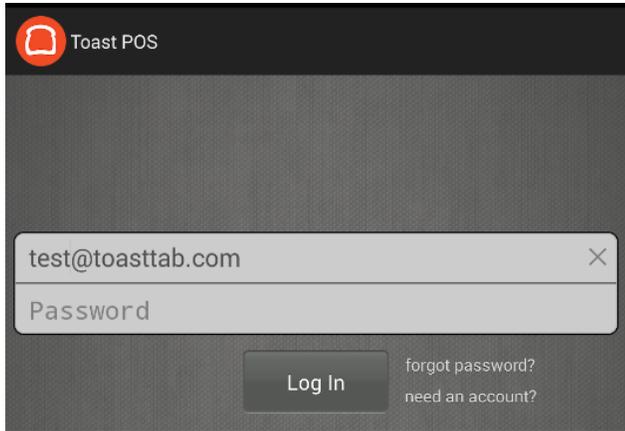
[Active Employees](#) [Invited Employees](#)



## A Note On The Two Types of Toast Users:

There are two kinds of users in Toast:

- Those with password and passcode access



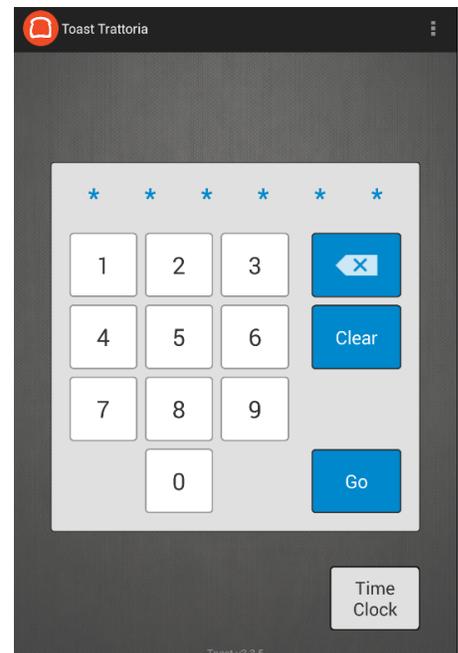
Passwords are entered on the main login screen to enter the POS.

Toast best practice dictates that all employees who require access to the POS get set up with individual email and password combinations. Unlike in legacy POS systems, having a username and password to log in with does not automatically give a user access to the Toast Admin website. Access to this website is controlled by the permissions configured to the job that a user is set up with.

In some cases, restaurants opt to create a generic user, sharing a common email address and password among staff. This generic user should be linked to a job with limited permissions to prevent access to the Toast Admin website. Having a generic user is helpful someone logs out by mistake, so that another staff member can log back into the POS.

- Those with just passcode access

Passcodes are entered here, when an employee is about to clock-in or access the POS:



## Create New User

A new employee is created in two parts, which are organized by tab:

- 1) Configure the information on the Basic tab, which entails filling out the following information:

Basic Jobs and Permissions

---

Email \*  **The email field is required, but you can enter a dummy email address if the user does not need to log into the system**

First Name \*  **First Name is a required field**

Last Name \*  **Last Name is a required field**

Employee ID  This is the id for external systems (like payroll).

User should have login capabilities

Password  Minimum of 7 characters, must include at least 1 number  
Password strength:

Confirm Password

Passcode \*  Must be numeric and 1-8 digits - this is used to log in to the Toast POS app  
**Passcode is required, as it is needed for anyone to log into the Toast POS app**

Photo    
 No image

- 2) Configure the jobs and permission on the second tab:

Home / Employees / Create User

Basic Jobs and Permissions

This process is identical to what is described above [under configuring a job](#) for the “Invite a New Employee” walkthrough



## Quick Add Users

Quick Add users enables a user to create multiple employees at once. No passwords are generated for them.

If an employee does not need access to the Toast Admin Website, a dummy email address may be entered in the email field. If an employee does need access to the Toast Admin Website, entering a correct email address will generate an email notification, and the employee can use the “forgot your password” link to set a unique password

Toast best practices dictate that permissions always be configured at the job level, so it is recommended to keep all of the access checkboxes shown below unchecked. As long as a job is assigned to each user, permissions will be inherited automatically.

Access: T = Table Service, Q = Quick Order, Tk = Ticket Screen, M = Manager, \$ = Cash Drawer Access

These two fields should be completed for all employees

Email	First Name	Last Name	ID	Access	Job	Passcode
<input type="text" value="Email"/>	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="ID"/>	<input type="checkbox"/> T <input type="checkbox"/> Q <input type="checkbox"/> Tk <input type="checkbox"/> M <input type="checkbox"/> \$	<input type="text" value="- Select -"/>	<input type="text" value="Passcode"/> 

+ Add row

These checkboxes should be left unchecked

The passcode is the numeric key that employees must enter to clock into the POS



# Marketing

Setting Name:	Restaurant Info
Location:	Marketing/Restaurant Info
Description:	The Restaurant Info function allows a user to modify various text-entry fields to describe a restaurant, including restaurant name (which appears on customer receipts), URLs, and images. This information shows up on the public webpage configured for every Toast restaurant by default
Example:	The restaurant has undergone a name change and has also modified its logo

Home / Restaurant Info Save

Restaurant Name  This is the name that appears on the customer receipt

Location Name

Optional. This is used externally to differentiate multiple locations; it should be a customer-friendly name, e.g. Neighborhood, Square, City, Hotel.

Location Code

Optional. This is used internally to differentiate multiple locations; it is typically a 3 or 4 letter code.

Restaurant Image 

This should be a square image at least 180px on a side.

Banner Image 

Optional. This should be at least 960px wide.

Background Image 

Optional. This should be at least 1000px wide.

## Toast Bar & Lounge

**i**

1064 10th st  
hermosa beach, CA 92054  
415-297-2450  
<http://pos.toasttab.com>

Activated

[View Public Page →](#)

Click here to see the public website



Additional settings are configured below:

Restaurant Description

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.

Website Url	<input type="text" value="http://pos.toasttab.com"/>
Facebook Page Url	<input type="text" value="https://www.facebook.com/"/>
Twitter Account	<input type="text" value="http://twitter.com/"/> <input type="text" value="Toast-inc"/>
Toast Tab Page	<input type="text" value="http://toasttab.com/"/> <input type="text" value="cals"/>

**Restaurant can customize URLs and social media accounts**

eGift Card Image

Optional. This image replaces the Restaurant Image on the eGift Card. This should be a square image at least 180px on a side.

This is how this information is presented on the front-end to customers visiting the restaurant's page:



Setting Name:	Hours/Services
Location:	Marketing/Hours/Services
Description:	The Hours/Services function allows a user to edit the daily and weekly schedules for the restaurant, including configuring services (lunch, dinner, etc.)
Example:	The restaurant has changed its lunch hours and is closed on Mondays moving forward

## Services

[Home](#) / [Restaurant Hours](#) / [Services](#) Save

Saved successfully ×

### Services

Order Name

0	Lunch	
1	Dinner	

Ensure that Lunch is ordered before dinner, it is the opposite by default

+ Add Row

## Day Schedules

Easily configure hours for each service and designate different schedules (weekends, weekdays, etc.)

### Day Schedules

For example, you may wish to set up two different schedules called 'Weekday' and 'Weekend' that have the appropriate hours for your restaurant. You can create as many or as few as you need.

Schedule Name		Service	Available?	Hours	
Weekends		Lunch	✔	11:00 AM - 4:00 PM	 Edit
		Dinner	✔	4:00 PM - 12:00 AM	 Edit
Weekdays		Lunch	✔	10:30 AM - 4:00 PM	 Edit
		Dinner	✔	4:00 PM - 11:00 PM	 Edit

+ Add Row

## Weekly Schedules

Check or uncheck the green checkmarks to designate on what days the restaurant is closed and on what days the schedules that have been configured previously apply:



## Weekly Schedule

---

Schedule	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Closed	✓	✓	✓	✓	✓	✓	✓
Weekdays	✓	✓	✓	✓	✓	✓	✓
Weekends	✓	✓	✓	✓	✓	✓	✓



Setting Name:	Receipt Setup
Location:	Marketing/Receipt Setup
Description:	The Receipt Setup function allows a user to customize what appears on printed receipts for customers. Header, footer, logo, and a host of other information such as font size can be configured in this section
Example:	The restaurant would now like to add a suggested tip amount on receipts and change the font size from normal to large

### Advanced:

#### Free Modifiers

- Show free modifiers on Dine-In receipts
- Don't show

- Recommendation is **Don't show** (to declutter receipt)

#### Service Charges Font

- Large Font
- Normal Font

- Recommendation is **Normal Font** (Large Font is very large)

#### Print Payments

- Show all completed payments on printed receipts
- Don't show \*

- Recommendation is **Don't show**. Other [payment types](#) treated as a "discount" will still print on the receipt

#### Itemize Receipts

- Always itemize Quick Order receipts
- Don't itemize Quick Order receipts

- Recommendation is **Always Itemize Quick Order receipts**

#### Hide Modifier Prices

- Yes - Include price of modifiers in the price of the main item
- No - Show price of each modifier separately

- Recommendation is **No - Show price of each modifier separately**

#### Display Tip Line

- Show tip line on credit card receipts
- Don't show

- Recommendation is **Show tip line on credit card receipts**



Check ID Barcode

Show barcode of check id on receipts

Don't show

- Recommendation is **Don't show**
  - Note that Check ID refers to the check the customer receives, not an identification check (i.e. verifying if someone is of age to consume alcohol, etc.)
- Some accounting software can scan in checks using barcodes

Combine items on receipts

Yes

No

- Recommendation is **Yes**. This helps readability and declutters the receipt

Print Suggested Tip Amounts on Merchant Copy

Yes

No

- No recommendation, as this this setting is restaurant-specific
  - The tip percentages to be suggested are configured in UI Options

Display Charity Tip Line

Yes

No

- No recommendation, as this setting is restaurant-specific
  - Enabling this setting will show a blank line on the receipt for the customer to write in an amount to donate to charity



Setting Name:	Rewards Program
Location:	Marketing/Rewards Program
Description:	The Rewards Program function allows a restaurant to configure how it manages this Toast add-on module, including conversion and accrual rates as well as customization around Birthday Rewards program.
Example:	The restaurant would like to allow guests to redeem birthday rewards at any point during the birthday month instead of just the day itself.

### Rewards Program and Rewards Program Description

Enabled?

Yes  
 No

- Recommendation is **Yes** if the restaurant wishes to activate the Rewards Program add-on module

Conversion Rate 1 point is redeemable for

Accrual Rate 1 point is earned for every

Accrual Target Points cannot be redeemed until they meet or exceed this value

Signup Bonus How many points to award as a signup bonus. Use 0 to disable.

Rewards Program Name If not specified, defaults to '[Restaurant Name] Rewards'



Description

- Show a custom description
- Show the default description

Default Description As a member of Toast Rewards, you will earn 1 point for every \$1 you spend and receive a \$5 discount for every 50 points you redeem.

Additional Description

- No recommendation, as these settings are restaurant-specific
  - Note that the description fields will only appear if Digital Receipts are enabled
  - This is how the description appears on the front-end after a user decides to sign up for a restaurant's Reward Program

### Toast Rewards

---

Email:

As a member of Toast Rewards, you will earn 1 point for every \$1 you spend, and receive a \$5 discount for every 50 points you redeem.

If you're already in the rewards program, just enter your email and we'll look up your account.

### Birthday Rewards

Enabled?

- Yes
- No

- Recommendation is **Yes** if the restaurant wishes to activate birthday rewards as a feature within the Rewards Program add-on module



Birthday Bonus	<input type="text" value="\$ 0.00"/>
Redemption Limits	<input checked="" type="checkbox"/> Birthday Only <input type="checkbox"/> Birthday Month <input type="checkbox"/> Custom Dates
Description	<input type="checkbox"/> Show a custom description <input checked="" type="checkbox"/> Show the default description
Default Description	When you sign up for our birthday rewards, we will place one \$0 discount on your card. If you come in on your birthday, we will automatically apply it to your check.

- No recommendation, as these settings are restaurant-specific

### Additional Setup

Rewards accounts can be looked up by name and email. Other payment types can be excluded from the rewards program from [Payment Options](#).

Certain parts of the menu can be excluded from the rewards program. See [Advanced Properties](#).



# Kitchen/Dining Room

Setting Name:	Kitchen Setup
Location:	Kitchen/Dining Room/Kitchen Setup (requires password re-entry)
Description:	Kitchen Setup allows a user to configure how the kitchen tickets and KDS screens should behave.
Example:	See below

## Course Firing

Course Firing	<input type="checkbox"/> Disable course firing
	<input checked="" type="checkbox"/> Send all courses to kitchen immediately, followed by a 'fired' notification when each course is fired by waitstaff
	<input type="checkbox"/> Don't send courses to kitchen until each course is fired by waitstaff

Modifier Course Firing Applies to modifiers with a different course from its menu item's course

	<input type="checkbox"/> Fire modifier to its configured course
	<input checked="" type="checkbox"/> Do not fire modifiers separately

There are five sections that can be configured:

- Disable course firing
  - Fires all items to the kitchen at the same time. The menu items will still be grouped by Courses if they have been created and assigned to menu items
- Send all courses to kitchen immediately, followed by a 'fired' notification when each course is fired by waitstaff
  - This setting will print the whole ticket to the kitchen when the send button is first pressed. Later on, when the send button is pressed again to notify kitchen to start a new course, a small ticket will print that says the course name and "Fired"

This setting is useful in a kitchen that wants to know a table's order for the entire meal beforehand
- Don't send courses to kitchen until each course is fired by waitstaff
  - This setting will only print a ticket with items from the relevant course that is fired. No fire notifications are printed

This setting is useful in a kitchen that wants to focus on the tickets as they are needed
- Modifiers generally inherit the same Course from the parent item they are modifying. It is



however possible to assign a different Course to a modifier

- The Modifier Course Firing setting allows a user to chose whether to fire modifiers (with different Course than the parent item) to its configured course or to not fire modifiers separately

## Expediter

Expediter Printer(s) No printers have been set up in Toast. [configure printers](#)

Printing Mode

- Always print expediter tickets
- Only print expediter tickets when Toast is in offline mode

Two-Level Fulfillment Allow for 2 expediter screens. Fulfilling an order on the first expediter screen only visually changes tickets shown on the second expediter screen. The second expediter screen is responsible for final order fulfillment.

Yes, allow a second expediter screen which will be responsible for final order fulfillment

No, only a single expediter screen is allowed

- Toast has a built in Expediter printer function. Some or all of the prep stations can be setup to print/display automatically to a predefined expediter printer
  - Expediter Printer(s) - This is where the printer is defined. All configured printers will be displayed and the user can choose one or more printer to act as the Expediter Printer(s)
- The Expediter Printing Mode can be setup to either always print an expediter ticket or only print an expediter ticket when Toast is in Offline Mode.
- Generally, when using Kitchen Display Systems (KDS), one KDS screen is setup as an Expediter display
  - This Two Level Fulfillment setting allows a user to use two expediter screens. Fulfilling an order on the first expediter screen only visually changes tickets shown on the second expediter screen. The second expediter screen is responsible for final order fulfillment

## Printed Tickets

The Printed Tickets section allows a user to change various setting on how printed tickets look:



Print Customer Name Bolded on Expediter Tickets

Yes, print customer name bolded on top of expediter tickets

No

Print Customer Details

Yes, include full customer details for takeout and delivery orders (name, address, etc)

No

Print Default Dining Option

Specify "Yes" to print the dining option on the ticket even if it is the default, currently 'None'

Yes

No

- Print Customer Name Bolded on Expediter Tickets will print the customer name in large font on top of expediter tickets
- Print Customer Details setting will enable or disable printing full customer (name, address, etc) for takeout and delivery orders
- Print Default Dining Option setting will enable or disable printing the dining option on the ticket if it is the default

Print Default Modifiers Black

Specify "Yes" to print default modifiers black instead of red when printing in Vertical Mode and Show Default Modifiers is "Yes"

Yes

No

Print Ticket Changes

Specify whether you would like to have ticket item modifications and/or voids sent to kitchen printers

Print changes and voids

Print changes only

Print voids only

Don't print changes and voids

Print Tickets for Every Item in an Order

Specify whether you would like to print individual tickets for every item in an order

Yes, print separate tickets for individual items and include prep station tickets

Yes, print separate tickets for individual items without prep station tickets

No, don't print individual tickets

- Print Default Modifiers Black setting will print default modifiers black instead of red when modifier printing is in Vertical Mode and Show Default Modifiers is set to "Yes"
- Print Ticket Changes setting allows a user to have ticket item modifications and/or voids sent to kitchen printers. There are four options - Print changes and voids; Print changes only; Print voids only or Don't print voids and changes
- Print Tickets for Every Item in an Order setting allows a user to specify whether to print individual tickets for every item in an order
- The next two settings allow a user to set the header and footer spacing for kitchen tickets:



Header Spacing  Configure ticket header spacing value. Default is '5'

Footer Spacing  Configure ticket footer spacing value. Default is '0'

### Ticket Screens

The Ticket Screens section allows a user to change various setting on how KDS screens display order tickets:

Warning Colors Change ticket colors at different time thresholds

Enabled  
 Disabled

	Enabled?	Threshold (minutes)	Color
Level 1	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	
Level 2	<input checked="" type="checkbox"/>	<input type="text" value="2"/>	
Level 3	<input checked="" type="checkbox"/>	<input type="text" value="3"/>	
Level 4	<input checked="" type="checkbox"/>	<input type="text" value="4"/>	

- Warning Colors are used to change ticket colors at different time thresholds. When enabled, a user can setup up to four levels of time thresholds and corresponding colors

Print On Demand  Enable kitchen staff to print tickets or takeout / delivery receipts from the ticket display screen  
 Disable printing from the ticket display screen

Flash Changes  Flash changes (new tickets, fired courses, etc) until acknowledged by kitchen staff  
 Don't flash changes

- Print On Demand setting allows a user to print kitchen tickets or takeout / delivery receipts from the ticket display screen
- Flash Changes setting will make new tickets, fired courses, etc flash until acknowledged by kitchen staff

The last three settings configure ticket settings for other stations, item fulfillment, and course status visibility:



Other Stations	<input checked="" type="checkbox"/> For each ticket, list other stations working on that ticket
	<input type="checkbox"/> Do not list other stations working on each ticket
Fulfill Items	<input checked="" type="checkbox"/> Enable individual item fulfillment
	<input type="checkbox"/> Disable individual item fulfillment
Hide Course Status	<input checked="" type="checkbox"/> Yes, hide the status of previous courses on kitchen tickets
	<input type="checkbox"/> No, show the status of previous courses on kitchen tickets

- No recommendation, as these settings are restaurant-specific

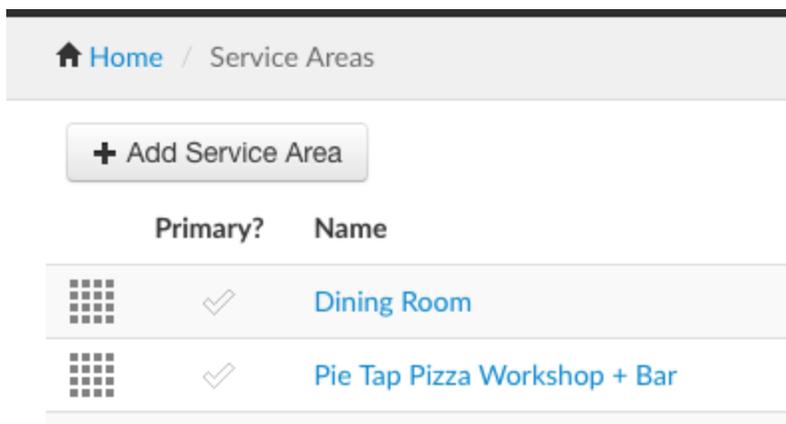
### Kitchen Names

Kitchen Names setting allows a user to change the default words that print on kitchen tickets. This is very useful for kitchens that may need to speak a different language than English



Setting Name:	Service Areas
Location:	Kitchen/Dining Room/Service Areas
Description:	The Service Areas setting allow a user to create and configure service areas (sometimes also called dining areas)
Example:	See below

Creating a service area is very simple. A user can create a new one by selecting the “Add Service Area” button:



### Basic

Name

Primary?  Yes, this is the primary service area  
 No, this is not the primary service area

Revenue Center

[Edit Tables](#)

- The service area can be setup as the primary service area. Only one service area can be primary
- A revenue center for the service area can also be configured here



## Auto-applied Gratuity

Auto-apply Gratuity?  Yes  No

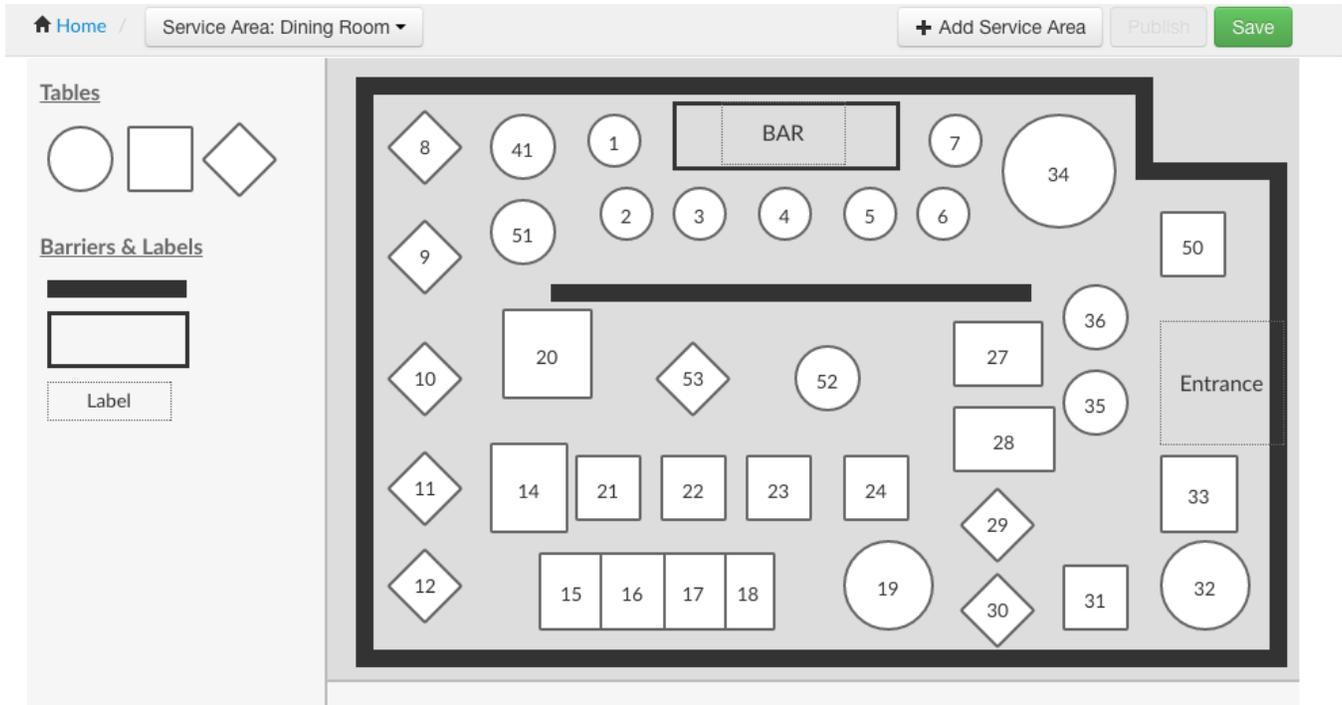
Gratuity

Minimum Party Size  Gratuity is applied for parties of this size or greater

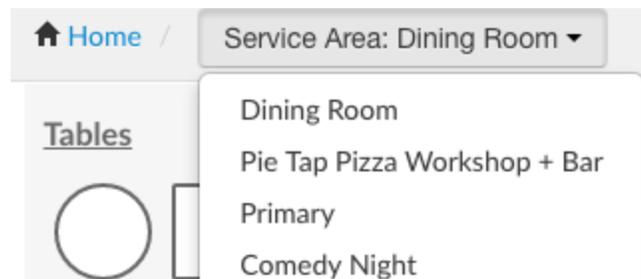
- Auto-apply Gratuity can be enabled or disabled. User will have to choose the auto-gratuity percentage and minimum party size



Setting Name:	Tables
Location:	Kitchen/Dining Room/Tables
Description:	The Tables section allows a user to create the restaurant table layout to be used on Toast
Example:	See below



- To create a table layout, first select the appropriate Service Area from the dropdown in the top-left corner



- Then drag the tables from the left to the service area and drop it in place
  - There are three types of tables that can be used - round, square and diamond
  - In addition to tables, lines, rectangles and labels can also be dragged into the service area.
- The tables can be numbered according to the numbering standard the restaurant uses.
- The size, width and height of the tables, lines, rectangles and labels can be adjusted as well



Setting Name:	Courses
Location:	Kitchen/Dining Room/Courses (requires password re-entry)
Description:	The Courses setting allows a user to define the courses that are going to be used in the restaurant.
Example:	See below

By default, the following courses are preconfigured on Toast - Drinks, Appetizers, Entree, Dessert.

A course can be added by simply pressing the “Add” button. The order of the courses can also be setup by pressing the “Order” button:

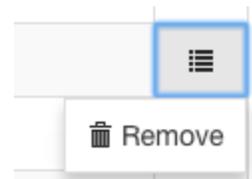
### Courses

Course Name
Appetizers
Entrees
Drinks
Dessert
Course 1
Course 2
Course 3
Course 4

+ Add Order

Please note that the courses defined here have to be mapped to menu groups and/or items for it to be effective.

A course can be removed by selecting the icon on the far right and choosing Remove:



If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

### Courses

Number	Course Name	Target	Owner	
67105406	Appetizers	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105408	Entrees	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105410	Drinks	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105412	Dessert	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105414	Course 1	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105416	Course 2	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105418	Course 3	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
67105420	Course 4	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰

+ Add

Order

[Show Archived](#)



Setting Name:	Prep Stations
Location:	Kitchen/Dining Room/Prep Stations
Description:	The Prep Stations section allows a user to create prep stations. Prep stations are used by Toast to route menu items to the kitchen printers
Example:	See below

A prep station has four properties: 1) Station Name, 2) Send to Expediter, 3) Ticket Printer, 4) Always Print Tickets

Station Name	Send to Expediter ⓘ	Ticket Printer	Always Print Tickets ⓘ	
Appetizers/Entree	<input checked="" type="checkbox"/>	None ▼	<input type="checkbox"/>	☰
Pool Hall	<input type="checkbox"/>	None ▼	<input type="checkbox"/>	☰
Drinks	<input type="checkbox"/>	None ▼	<input checked="" type="checkbox"/>	☰
Soup	<input checked="" type="checkbox"/>	None ▼	<input type="checkbox"/>	☰
No Print	<input type="checkbox"/>	None ▼	<input type="checkbox"/>	☰
Food	<input type="checkbox"/>	None ▼	<input checked="" type="checkbox"/>	☰

[+ Add](#) [Order](#) [configure printers](#)

- The Station Name is the name of the prep station. Menu groups, subgroups and menu items have to be mapped to prep stations for printing to work properly
- When the Send To Expediter option is checked for a prep station, the items that are mapped to the particular prep station are not only sent to the assigned printer but also the expeditor printer
- The Ticket Printer property allows the user to map the prep station to a physical printer. This printer can be either an impact kitchen printer or a thermal receipt printer
  - More than one prep station can be assigned to the same physical printer. Please note that each prep station will have a paper cut at the end of the printout
- If Always Print Tickets is checked, tickets will automatically be printed when there are items routed to the prep station. If not checked, tickets will only be printed in offline mode

*Please note that items that are not assigned a prep station will print on every printer by default. **This is different from most mainstream POS systems.** It is best practice to always create a prep station called "NO PRINT" with no physical printer assigned and assign it to any menu groups, subgroups and/or menu items that do not need to print*



If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

### Prep Stations

Number	Station Name	Send to Expediter 	Ticket Printer	Always Print Tickets 	Target	Owner	
15854385	Appetizers/Entree		None ▾		Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	
15855417	Pool Hall		None ▾		Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	
15855472	Drinks		None ▾		Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	
92932874	Soup		None ▾		Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	
92932876	No Print		None ▾		Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	
105067087	Food		None ▾		Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	

[+ Add](#) [Order](#) [configure printers](#)

[Show Archived](#)



Setting Name:	Dining Options
Location:	Kitchen/Dining Room/Dining Options
Description:	The Dining Options define the various types of order types a user can use to place an order on Toast
Example:	<p>A restaurant has a lot of customers call in their lunch orders. The management wants to track how many orders are called in everyday and compare it to how many orders are ordered as take out. Furthermore, the restaurant wants to save customer information and order history.</p> <p>Create a new Dining Option named "Phone In" and assign it the property "Take Out" , check "Future" and do not check "Default"</p> <p>The newly created dining option will be accessible through the order screen, which is found by entering Table Service or Quick Order modes</p>

## Dining Options

Name	Behavior	Future ⓘ	Default	
Take Out	Take Out ▼	✓	✓	☰
Dine In	Dine In ▼	✓	✓	☰
Pick Up	Take Out ▼	✓	✓	☰

A user can create an many Dining Options as required e.g. Eat In, To Go, Phone In, Delivery, Catering etc. Three Dining Options - Dine In, Take Out and Delivery are available by default on Toast.

Each Dining Option has to be assigned a Behavior and can be configured with an additional two properties - Future and Default.

There are three available Behaviors:

- Dine In - Standard order flow - order, send and/or pay
- Take Out - This behavior will prompt for a customer name and phone number to be entered before an order is placed. Toast will keep track of the customer information and order history allowing previous orders to be re-ordered with a click of a button
- Delivery - This behavior will prompt for a customer name, phone number and address to be entered before an order is placed. Toast will keep track of the customer information and order history allowing previous orders to be re-ordered with a click of a button



If the “Future” property is checked, the corresponding dining option will require orders to be scheduled for a future date/time. This is useful for phone orders and/or catering orders.

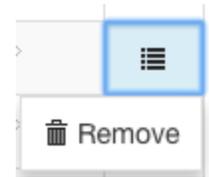
The “Default” property will make sure that the particular Dining Option is preselected when a user logs into Toast

- Only one Dining Option can be selected as default
- This property will be set on all the devices in the restaurant but can be overridden by using a device specific default Dining Option

A new dining option can be added by simply pressing the “Add” button. The order of the dining options can also be setup by pressing the “Order” button:



A dining option can be removed by selecting the icon on the far right and choosing Remove:



*Toast's Sales Report tracks net sales and number of orders for all dining options. You can locate this information by tapping on Sales Report from the main Toast POS dashboard.*

*Note that any order from Toast POS that is not automatically assigned to your default dining option or manually assigned to an alternative option will appear on the report as under "NONE"*

If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

**Dining Options**

Number	Name	Behavior	Future ⓘ	Default	Target	Owner	
14734425	Dine In	Dine In ▾	✓	✓	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
14735658	Pick Up	Take Out ▾	✓	✓	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
14735659	Delivery	Delivery ▾	✓	✓	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
130848868	Grubhub	Delivery ▾	✓	✓	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰



Setting Name:	Printers
Location:	Kitchen/Dining Room/Printers
Description:	The Printers setting allows a user to define and configure physical printers on Toast
Example:	See below

Toast uses the following IP printers:

- Epson T88V
- Epson T20
- Epson U220
- Epson U220 Chinese
- Epson L90

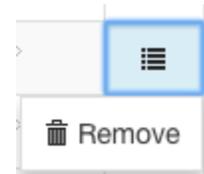
In addition to the printers above, the following thermal IP printers are also supported:

- Star TSP650
- Star TSP100

To add a new physical printer, simply press the “Add” button. The order of the printers can also be setup by pressing the “Order” button:



A printer can be removed by selecting the icon on the far right and choosing Remove:



The following properties need to be configured to successfully add a printer:

Name

- Name: Enter the name of the printer being configured. The best practice here is to use a descriptive name and add the last three digits of the printer’s IP address in parenthesis e.g. Kitchen Printer (169)



Model

- Epson T88V
- Epson T20
- Epson U220
- Epson U220 - Chinese
- Epson L90
- Star TSP650
- Star TSP100

- Model: Select the model of the printer that is being configured

IP Address

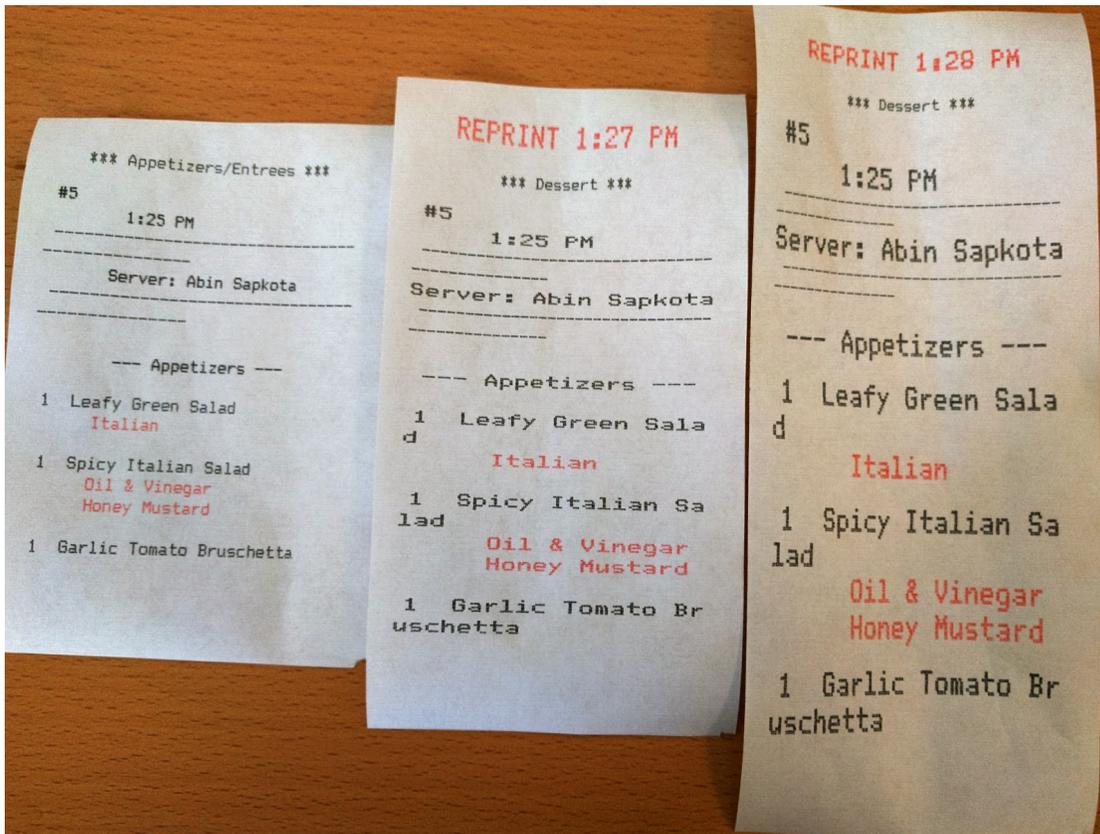
- IP Address: Enter the IP address of the printer here. Toast uses the IP range of 192.168.192.168 - 192.168.192.198 for printers. The IP address 192.168.192.168 is reserved and the first printer IP address is 192.168.192.169

Kitchen Ticket Font

- Normal
- Medium
- Large

- Kitchen Ticket Font: Select the size of the font on kitchen ticket. A user can select Normal, Medium or Large font. The default font size is Medium. Please see screenshot below for sample font sizes





Paper Width

- Narrow (57.5-58mm)
- Wide (76-80mm)

- Paper Width: Select the width of the paper being used. The default paper width is Wide (76-80mm)

Backup

- None
- Cash Drawer 1

- Backup: Select a backup printer. If a print job cannot be sent to the printer (powered off, paper jam, out of paper etc), it gets sent to the backup printer configured here

Cash Drawer?

- No Cash Drawer
- One Cash Drawer
- Two Cash Drawers



- Cash Drawers: Select whether a cash drawer is attached to the printer or not. Toast is capable of supporting up-to two cash drawers. *Please note that this requires special hardware and cables to work properly.*

When a cash drawer is selected, two additional options need to be setup:

Starting Cash Drawer Balance

Reset Balance Type  Automatic  Manual

- Starting Cash Drawer Balance defines the starting dollar amount of a given cash drawer
- Reset Balance Type can be configured to either Automatic or Manual

If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

#### Printers

Number	Name	IP Address	Cash Drawer?	Target	Owner
No printers have been added					
<input type="button" value="+ Add"/> <input type="button" value="Order"/>		<a href="#">Show Archived</a>			



# Payments

Setting Name:	Payment Options
Location:	Payments/Payment Options
Description:	The Payment Options function allows a user to set up the various options relating to payments on Toast, including settings that control cash, credit, rewards, and gift card transactions, as well as receipt setup.
Example:	There are many possible scenarios, read below for additional information

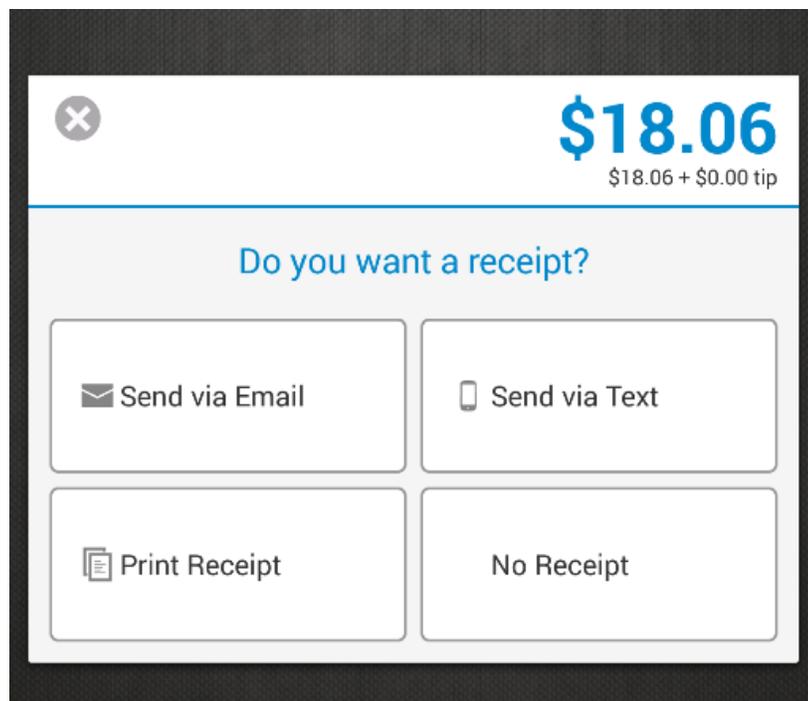
## General

Use Flat Receipt Option Selector

Yes

No

- Recommendation is **Yes**, as this allows customers to provide feedback after they sign digital receipts
  - If disabled, customers are unable to provide feedback and see the following screen:



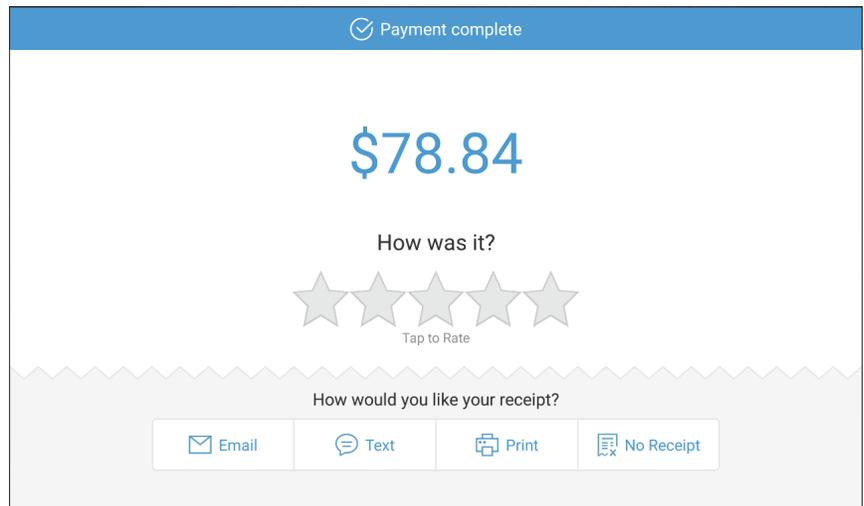
- If enabled, another section appears below:



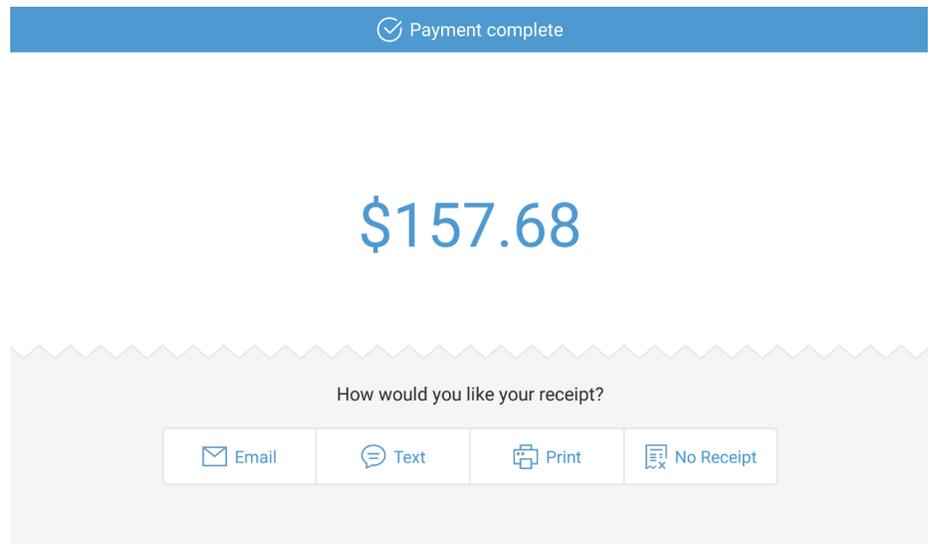
Prompt for Customer Feedback

- Yes, prompt for feedback in receipt selection screen
- No

- Recommendation is **Yes**, prompt for feedback in receipt selection screen
  - If enabled, customers will be able to provide feedback using a 5 star rating system, as shown below:



- If disabled, customers do not see the 5 stars:



## Cash

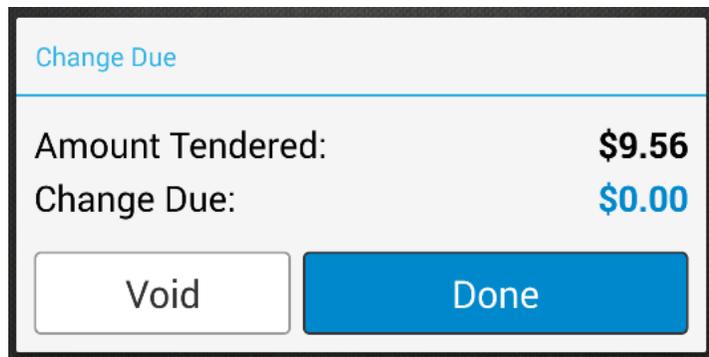
These settings in this section control digital receipts for **cash transactions**:

Digital Receipt Dialog

Yes, show the receipt dialog after each cash payment (Digital Receipts only)

No, skip this dialog (Digital Receipts only)

- No recommendation, as this setting is restaurant-specific
  - If enabled, the first screen customers see following a cash transaction looks as follows:



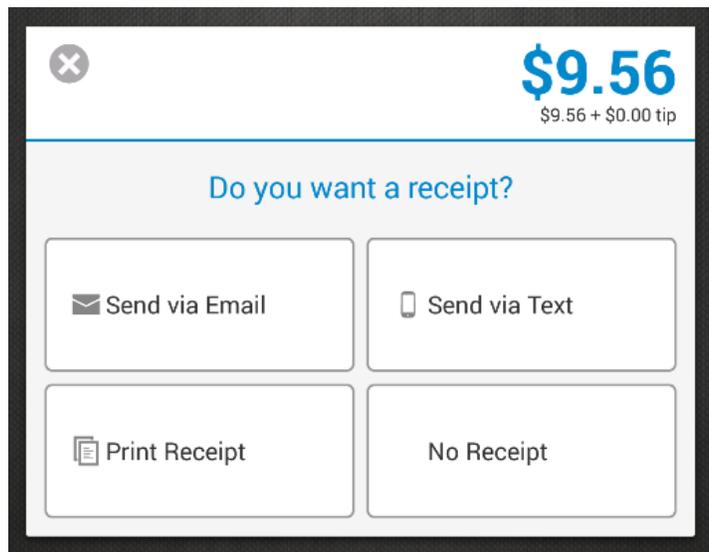
Change Due

Amount Tended: **\$9.56**

Change Due: **\$0.00**

Void Done

Upon selecting Done, the second screen appears as follows:



✕ **\$9.56**  
\$9.56 + \$0.00 tip

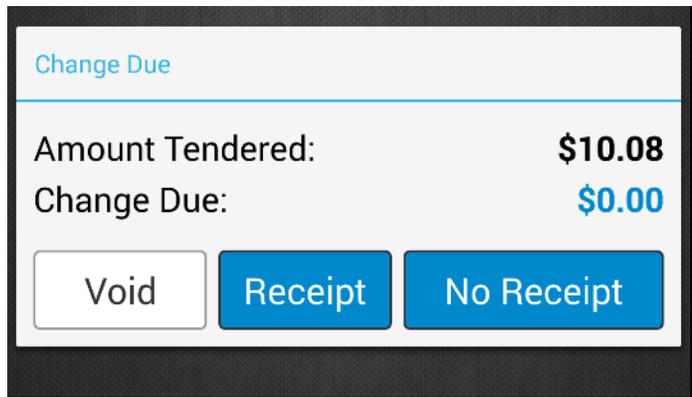
Do you want a receipt?

✉ Send via Email 📱 Send via Text

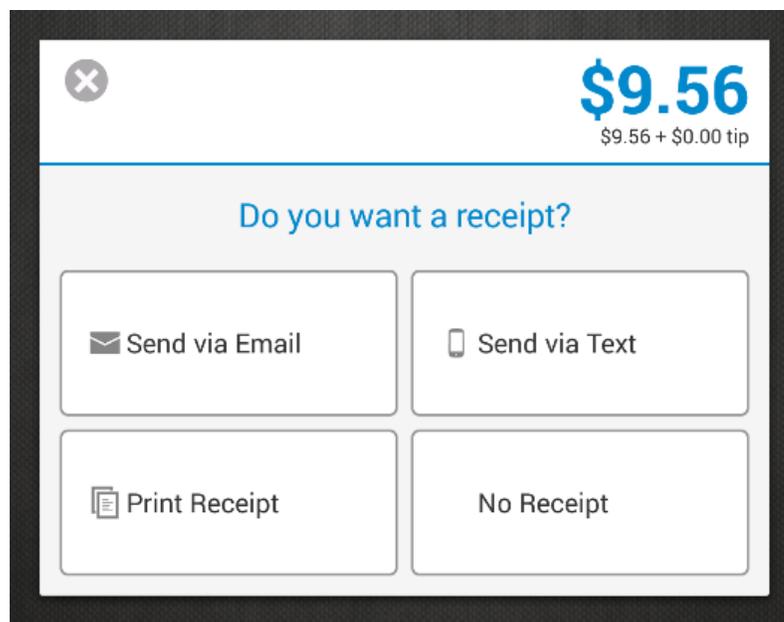
🖨️ Print Receipt No Receipt

- If disabled, the first screen customers see following a cash transaction looks as follows. The customer is able to choose No Receipt right from this screen:





Upon selecting Receipt, the second screen appears as follows:



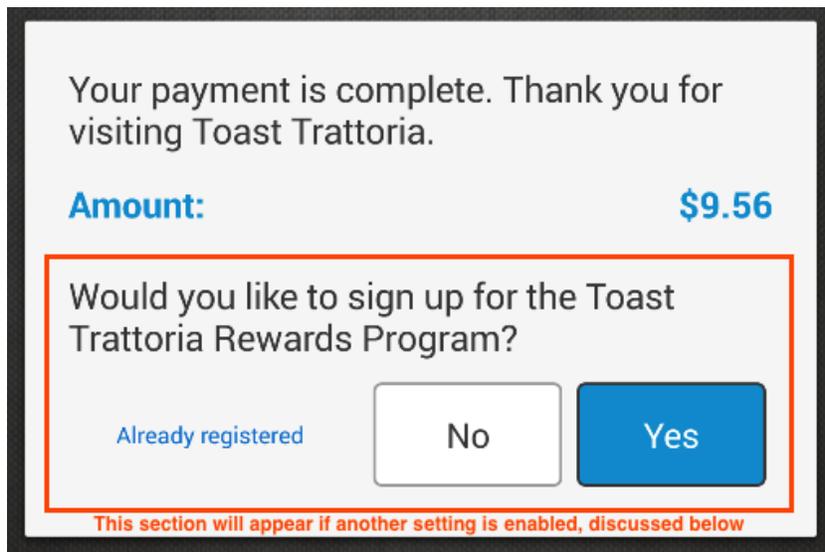
Thank You Dialog

Yes

No

- No recommendation, as this setting is restaurant-specific
- If enabled, the customer sees a Thank You popup after a cash transaction is completed:





Rewards Signup

<input checked="" type="checkbox"/>	Yes
<input type="checkbox"/>	No

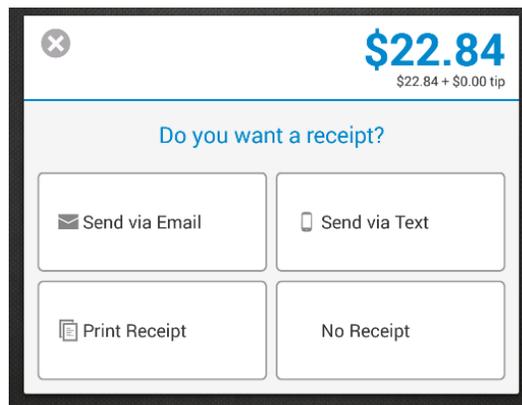
- Recommendation is **Yes** if the restaurant uses Toast Rewards
- If enabled, the customer sees the prompt boxed in orange above asking to sign up for the restaurant's reward program

Cash Receipt Options

This configuration is intended to make the cash payment process faster. Selecting "Always Print Receipt" will automatically print a receipt and skip the change due dialog if there is no change due. "No Receipt" is the same as "Always", but does not print a receipt.

<input checked="" type="checkbox"/>	Prompt for Receipt Options
<input type="checkbox"/>	Always Print Receipt
<input type="checkbox"/>	No Receipt

- No recommendation, as this setting is restaurant-specific.
  - Selecting Prompt for Receipt Options will allow the customer to choose a type of receipt from the receipt dialog



- Selecting Always Print Receipt will automatically print a receipt and skip the change due dialog if there is no change due
- Selecting No Receipt will not print a receipt, and will also skip the change due dialog if there is no change due

## Credit

Signature Threshold

Show tip / signature for orders at or above this amount.

- No recommendation, as this setting is restaurant-specific

Print Receipt Threshold

For paper receipts, automatically print for orders at or above this amount.

- No recommendation, as this setting is restaurant-specific

Process credit cards offline?

If you specify Yes, cards will be processed after the device comes back online. There is a chance that the card is denied.

<input checked="" type="checkbox"/> Yes
<input type="checkbox"/> No

- Recommendation is **Yes**
  - Please note that when credit cards are processed in offline mode, there is a chance that the card is declined since the cards are only processed when the device comes back online

Always process offline?

Specify yes if you do not want to wait for authorization to succeed before printing a receipt or moving to the thank you dialog.

<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No

- Recommendation is **Yes** for restaurants that have a low average check and want maximized throughput
- Recommendation is **No** for restaurants that have a high average check

These settings in the following section control digital receipts for **credit transactions**:

Tip & Signature UI

<input checked="" type="checkbox"/> Use the combined Tip & Signature Screen
<input type="checkbox"/> Use the legacy Tip screen along with the legacy signature screen.

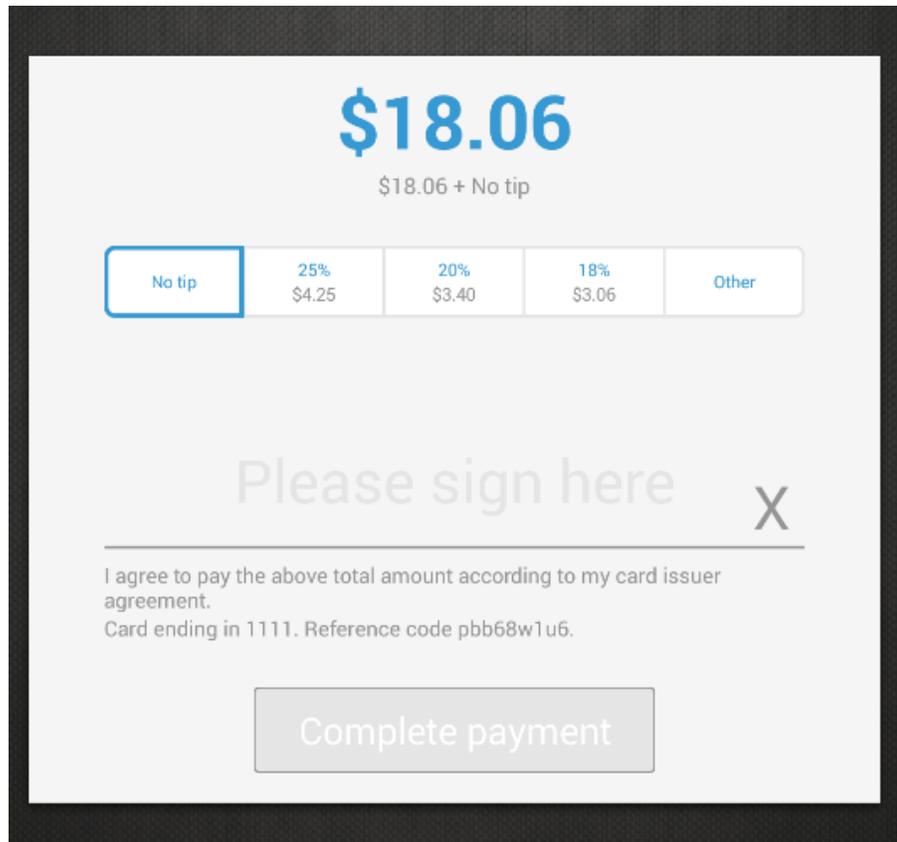


- Recommendation is **Use the combined Tip & Signature Screen**
  - When this is enabled, a subsequent section will appear

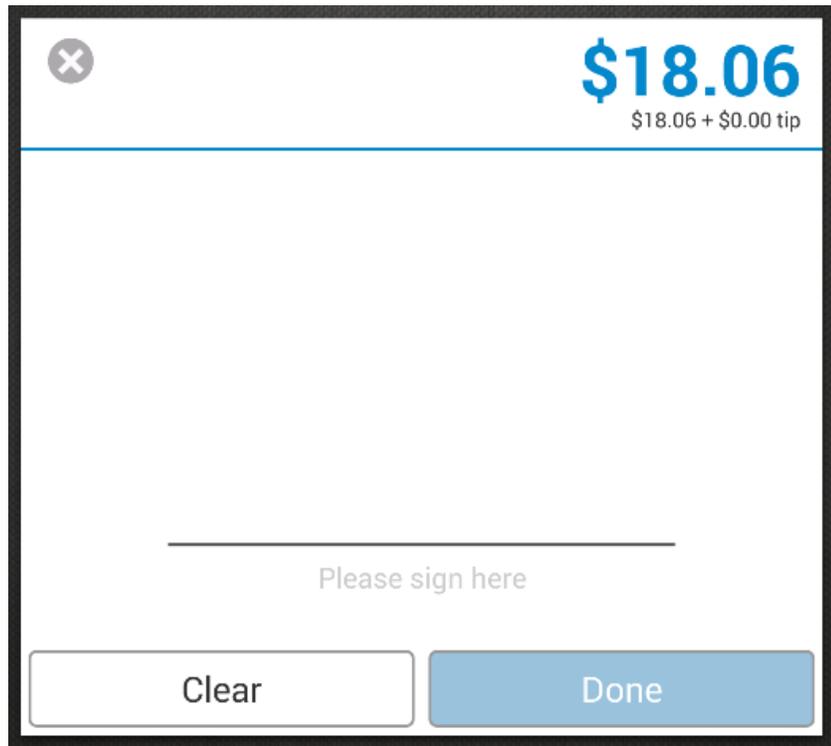
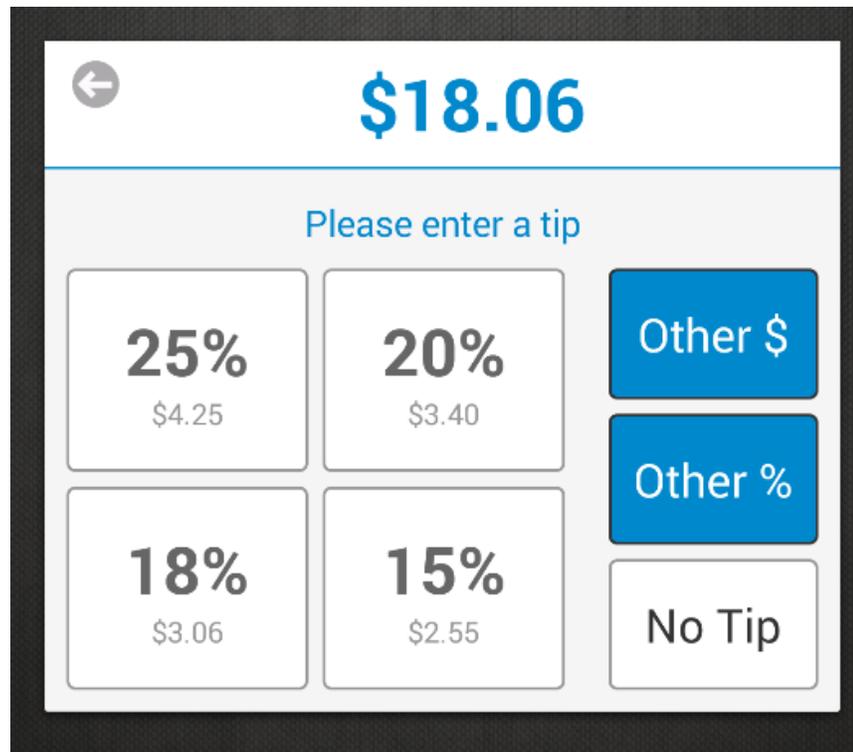
Tips Enabled

<input checked="" type="checkbox"/>	Yes, show the tip dialog
<input type="checkbox"/>	No

- Recommendation is **Yes**, show the tip dialog
- Taken together, this is how it appears on the front-end:



- o The legacy tip screen and legacy signature screen look as follows:



### Table Service

Allow receipt option screen during authorization

Wait for authorization to succeed

### Quick Service

Allow receipt option screen during authorization

Wait for authorization to succeed

- No recommendations, as these settings are restaurant-specific
  - Note that allowing the receipt option during credit card authorization will speed up the payment process, but in the event of a failed authorization, customers may need to swipe their card again

## Rewards

### Lookup Account

Yes, allow lookup by name and email

No, customer must present a rewards card at point of sale

- Recommendation is **Yes**, allow lookup by name and email
  - If enabled, a user may search for a customer's rewards account by selecting the Rewards button, then entering a name, phone number, or email address:

#4, Dine In Farhan Quasem

Type	Name	Amount	Tip	Total
Swipe a card now or enter an amount below.				

Refund Receipt Adjust **Rewards** Close Done

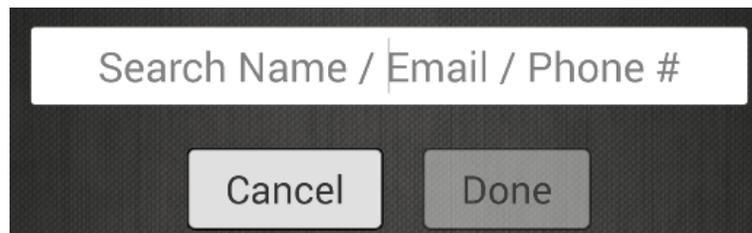
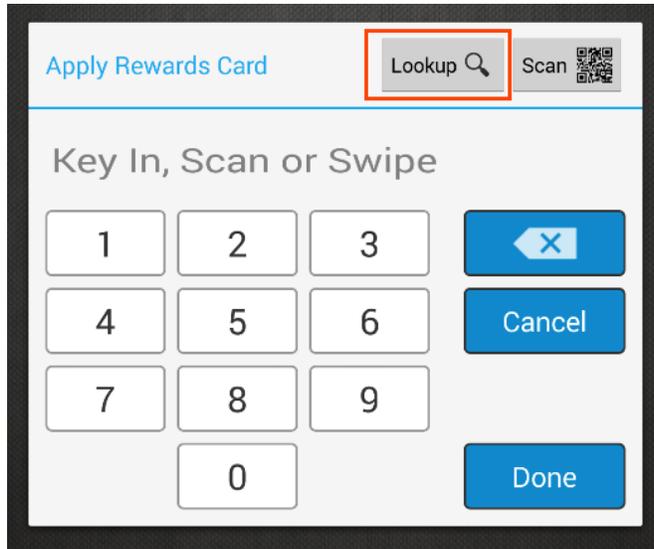
Discounts: \$0.00 TOTAL: \$9.56  
Subtotal: \$9.00 Balance Due: \$9.56  
Tax: \$0.56 Tips (0%): \$0.00

Balance Due: \$9.56 Amount Tendered: [ ]

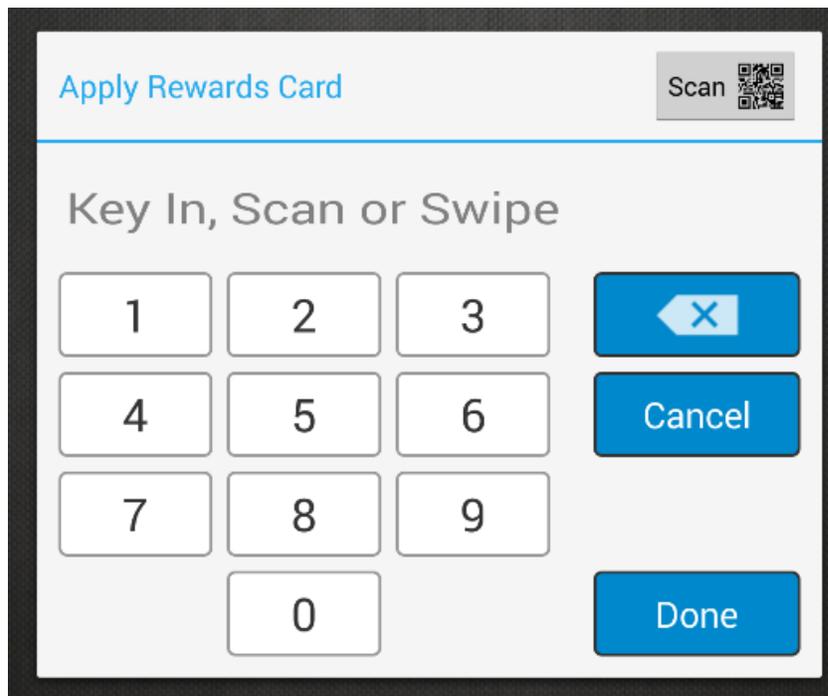
Cash  
Credit  
Gift Card  
Other  
Split

1 2 3 \$10  
4 5 6 \$20  
7 8 9 \$50  
C 0 00 [x]





- If disabled, the Lookup button is not available



## Gift Card

Minimum Amount  \$  Don't allow the sale of gift cards for less than this amount

Maximum Amount  \$  Don't allow the sale of gift cards for more than this amount

Receipt Options	Tips Enabled	Show Receipt Dialog ⓘ	Show Thank You Dialog ⓘ	Show Rewards Signup Dialog
	✓	✓	✓	✓

These two settings only apply to devices in Digital Receipts mode

- No recommendations, as these settings are restaurant-specific

## LevelUp

LevelUp Enabled?

Enable LevelUp

Disable LevelUp

- Recommendation is to Enable LevelUp if the restaurant uses this third-party integration.
- When this setting is enabled, the customer is required to login to his/her Levelup account and link it to Toast.



Setting Name:	Other Payment Options
Location:	Payments/Other Payment Options
Description:	The Other Payment Options function allows a user to configure additional payment options for restaurant customers.
Example:	Other payments could include special meal plans (e.g. for college students) or online ordering services such as GrubHub.

Easily add a payment option by selecting the +Add button:

Selecting the Order button enables a user to change the order of the sales categories numerically (the lower the number, the higher it appears on the list):

Order	Name
0	<a href="#">Gift Card</a>
1	<a href="#">Credit Card</a>
2	<a href="#">Room Charge</a>

Select a payment option to configure additional settings, detailed below:

Name

Number

Description

Require Manager Approval  Yes  No

- No recommendations, as these settings are restaurant-specific



**Treat as Discount** Select yes to print this payment on the receipt with an amount due after it. Tip and auto-applied gratuity will also not be calculated on this payment option. The difference between this payment and a discount is that this will not subtract from the tax calculation. This is intended for payments like Groupon, LivingSocial, etc.

<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No

- No recommendation, as this setting is restaurant-specific
- If **Yes** is selected, this payment will be printed with an amount that will not include tip or auto-applied gratuity
  - Additionally, this payment will not subtract from the tax calculation like a typical discount, Groupon, LivingSocial, and other related payments that fall under this category

**Tax Exempt** Select yes to automatically make the check tax exempt when this payment is applied. This is intended for 3rd party delivery or online ordering services that manage taxes independently.

<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No

- No recommendation, as this setting is restaurant-specific
- If **Yes** is selected, the check will be made tax-exempt when this payment is applied
  - GrubHub and other 3rd party delivery/online ordering services fall under this category because they are collecting tax on their own sites

**Tips Enabled**

<input checked="" type="checkbox"/> Yes, show the tip dialog and tip receipt line
<input type="checkbox"/> No

- No recommendation, as this setting is restaurant-specific

**Show Thank You Dialog** This only applies to devices in "Digital Receipts" mode.

<input checked="" type="checkbox"/> Yes, show the thank you dialog in digital receipts mode
<input type="checkbox"/> No

- No recommendation, as this setting is restaurant-specific



Show Receipt Dialog This only applies to devices in "Digital Receipts" mode.

Yes, show the receipt dialog in digital receipts mode

No

- No recommendation, as this setting is restaurant-specific

Show Thank You Dialog This only applies to devices in "Digital Receipts" mode.

Yes, show the thank you dialog in digital receipts mode

No

- No recommendation, as this setting is restaurant-specific

Show Rewards Signup Dialog

Yes, prompt for rewards signup in digital receipts mode

No

Allow Rewards Card

Yes, allow a rewards card to be applied for this payment option

No

- No recommendations, as these settings are restaurant-specific

If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

#### Other Payment Options

Number	Name	Target	Owner	
15873815	<a href="#">Gift Card</a>	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
15872539	<a href="#">Credit Card</a>	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
15872947	<a href="#">Room Charge</a>	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰



Setting Name:	House Accounts
Location:	Payments/House Accounts
Description:	The House Accounts function allows a user to configure house accounts as a payment option
Example:	There are many possible scenarios, read below for additional information

## House Accounts

POS Config

Enable house account payment method on POS.

Disable house account payment method on POS.

- If the restaurant decides to use house accounts, this setting must be enabled

Automatically pay house account balance when creating an invoice

Yes

No

- No recommendation, as this setting is restaurant-specific
  - If the restaurant decides to swipe a credit card on the terminal to pay for a house account invoice, this should be set to No

## Manage

Select the New House Account button to configure a new house account. The following details need to be filled in:

First Name

Last Name

Email

Phone  must be numeric and 10 digits

Customer #  (Optional) Used to look up a house account conveniently.

The second part, an address, is recommended if the house account makes delivery orders:



Street Address \*

Apt, Company, Floor

City \*

State \*

ZIP Code

Notes

To edit an existing house account, click anywhere in the corresponding row. Note that you can also export your house accounts to an Excel spreadsheet and search for them using the Search bar:

Search house accounts in this search box

25  accounts per page Showing 1 to 10 of 10 accounts Show / hide columns 

Select this icon to export to Excel

Customer #	Account #	Name	Phone	Last Trans. Date	Outstanding Balance (\$)
5020	8627237831531441	Tony Bliss	818-389-0434	2/19/2016 2:24 PM	\$0.00
	8627916080450789	Tash Stickney	978-317-3612	4/26/2016 4:17 PM	\$17.62

Click anywhere in a the row to edit an existing house account



Setting Name:	Discounts
Location:	Payments/Discounts
Description:	The Discounts function allow a user to configure discounts, which are of four types - fixed percentage, fixed dollar amount, open percentage, and open dollar amount
Example:	A restaurant manager wishes to configure a \$5 off a single item discount for Cinco de Mayo

- Selecting the +Add button enables a user to create a new discount
- Selecting the Order button enables a user to change the order of the sales categories numerically (the lower the number, the higher it appears on the list):

Order	Name
0	Comp
1	Comp
2	Discnt Item \$
3	Discnt Check \$

- Select the  button afterwards to save changes to the order

The four core settings for discounts can all be configured from the main page:

### Discounts

Name	Type	Choose if discount should be:	Applies To	Choose if it should apply to the Check or to the Item	Value	Only appears for % discounts	
Comp <small>Enter a name for the Discount</small>	Fixed %	1. Fixed % 2. Fixed \$ 3. Open % 4. Open \$	Check		100	%	
							

Selecting the name of the discount in the first column allows a user to configure a number of additional settings:

POS Name

Alternative shortened name for POS

- No recommendation, as this setting is restaurant-specific
  - This is the name of the discount on the front-end, what appears on the button for the discount that servers need tap to apply to it to a transaction



Target Toast Bar & Lounge ▼

Owner Toast Bar & Lounge ▼

- The Target and Owner fields are important for multi-location organizations taking advantage of Master Menu Management

Active  Yes  
 No

- The discount can be activated or deactivated by selecting Yes or No

Permission  Any User  
 Manager

- No recommendation, as this setting is restaurant-specific
  - This setting controls whether any user can issue the discount during payment or if it should be restricted to managers only

Discount Type  Fixed Percentage  
 Fixed Amount  
 Open Percent  
 Open Amount

Discount Percent 5.0 %

Applies To  Item  
 Check

- These settings control the discount itself. Selecting Fixed amount will change the second field to a discount amount, shown below:

Discount Amount \$ 5.00



Setting Name:	Void Reasons
Location:	Payments/Void Reasons
Description:	The Void Reasons function allows a user to configure the various options that waitstaff can select when voiding an item for a customer
Example:	Examples of void reasons include Disliked Food, Server Mistake, Kitchen Mistake, etc.

- Easily add a void reason by selecting the +Add button:

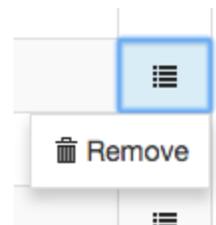


- Selecting the Order button enables a user to change the order of the void reasons numerically (the lower the number, the higher it appears on the list):

Order	Name
0	Disliked Food
1	Server Mistake
2	Kitchen Mistake

- Select the  button afterwards to save changes to the order.

- Activate or deactivate a void reason by checking/unchecking the green checkmarks in the Active column.
- A void reason may be removed by selecting the icon on the far right and choosing Remove



If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

**Void Reasons**

Number	Name	Active	Description	Target	Owner	
14732974	Disliked Food	✓	Description	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
14732975	Server Mistake	✓	Description	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
14732976	Kitchen Mistake	✓	Description	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰
51174801	Ordered Too Many	✓	Description	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰



Setting Name:	Service Charges
Location:	Payments/Service Charges
Description:	The Service Charges function allows a user to configure the various service charges that waitstaff can select to apply a service charge to an order
Example:	Examples of service charges include Delivery Fee or Party Fee

- Easily add a service charge by selecting the +Add button: 
- Selecting the Order button enables a user to change the order of the service charges numerically (the lower the number, the higher it appears on the list):

Order	Name
0	Included Gratuity
1	Delivery Fee

- Select the  button afterwards to save changes to the order.
- The settings for a service charge are as follows:

Name

Number 15870320

Charge Type

- Fixed Percent
- Fixed Amount
- Open Amount

- Name: This will vary from service charge to service charge
- Number: Assigned automatically
- Charge Type: Select one of the three types listed
  - Fixed Percent
  - Fixed Amount
  - Open Amount



- The option that is selected determines the fields that populate below. In the case of a Fixed Amount, the charge amount appears:

Charge Amount

Apply After Amount Threshold

- Apply After Amount Threshold: The fee is applied 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.

- No recommendation, as this this setting is restaurant-specific
- Yes will add this gratuity amount to the server's tips owed and the shift report

The next two fields, if enabled, will display additional fields:

### Taxed

Taxed?  Yes  
 No

### Taxes

Applicable Taxes  Sales Tax (9%)  
 Hospitality (2%)

- Select the appropriate taxes as necessary. These taxes are configured in Tax Rates (see the next section of the guide)

### Delivery

Delivery?  Yes  
 No

Waive Fee Threshold



- The fee is waived if the pre-discount amount of the check is greater than OR equal to this amount

Delivery Distance  
Threshold

- The fee is applied only if the delivery distance (in miles) is greater or equal to the number entered here.



Setting Name:	Tax Rates
Location:	Payments/Tax Rates
Description:	The Tax Rates function allows a user to configure various taxes to be applied to checks at the restaurant
Example:	Examples of tax rates include Sales Tax and local taxes (specific to states, counties, or items such as liquor)

- Easily add a tax rate by selecting the +Add button: 
- Selecting the Order button enables a user to change the order of the tax rates numerically (the lower the number, the higher it appears on the list):

Order	Name
0	Sales Tax
1	Hospitality

- Select the  button afterwards to save changes to the order.
- The settings for a tax rate are as follows:

---

Name

Number 15862390

Import ID

Type  Percent  
 Fixed  
 Disabled

Rate  %

Default?  Yes  
 No



- Name: This will appear on the customer receipt and in reporting
- Number: Assigned automatically
- Charge Type: Select one of the three types listed

- Percent
- Fixed
- Disabled

- If either Percent or Fixed are selected, the corresponding fields will be shown

- In the case of a Percent, a % rate field appears:

Rate  %

- In the case of Fixed, a \$ rate field appears of the form \$/per unit quantity (e.g. \$0.21 per gallon, etc.). This is generally used for taxes like Bottle Tax

Rate

- If the tax should be applied by default, select Yes

Default?  Yes  
 No

- At least one tax rate should be set as a Default. This will ensure that when new menu items are created, the Default tax rate is automatically assigned to it



# Other Setup

Setting Name:	UI Options
Location:	Other Setup/UI Options
Description:	The UI Options function allows a user to control many front-end settings on the POS. These configurations control the look and feel of the app and how users interact with many of the functionalities of the POS system
Example:	There are many possible scenarios, read below for additional information

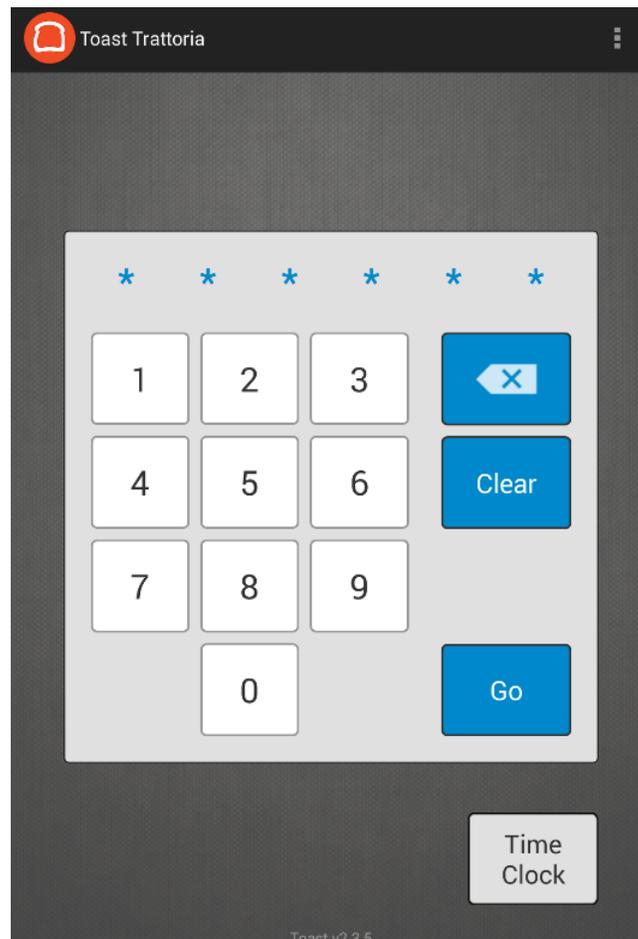
## Login Screen

Mask Passcode

Yes

No

- Recommendation is **Yes**. With this setting enabled, numeric passcodes, when entered, appear as asterisks, protecting users' privacy



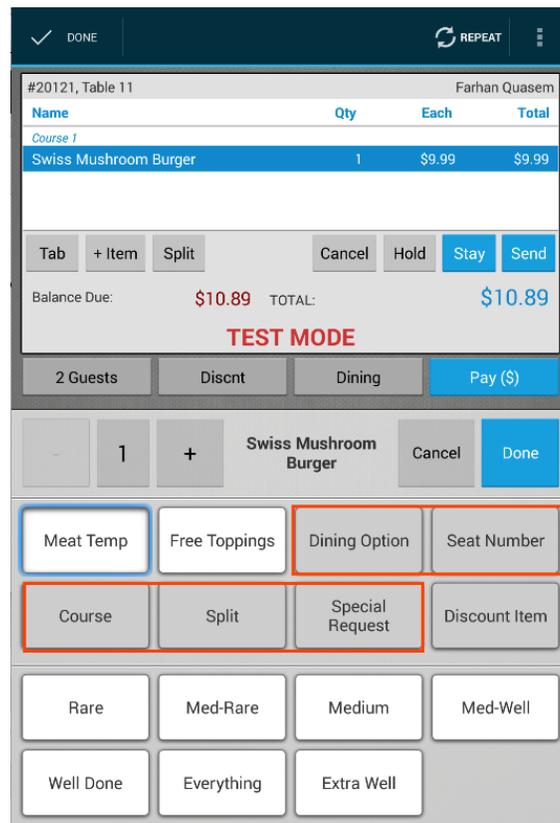
## Order Screen

Additional Modifier Groups

	Name	Enabled	Required
	Dining Option	✓	
	Seat Number	✓	✓
	Course	✓	
	Split	✓	
	Special Request	✓	

- No recommendation, as this this setting is restaurant-specific
  - When enabled, each of these modifier groups appear on the order screen in the order they are listed. They can be reordered by selecting the grid icon in the first column, then dragging and dropping as necessary
  - Checking/unchecking the green checkmarks in the “Enabled” column enables/disables the selected modifier group from view. If the required checkmark is checked, that modifier group requires a response from the end-user
  - Only Seat Number can be setup as a Required modifier. Please keep in mind that this will enable the requirement for all menu items on the POS

This is how the POS looks if the settings above are configured on the Toast Admin website:



Valid SSIDs

SSID

ToastTrattoria\_SECURED

+ Add SSID

- Recommendation: **Restaurant Name\_SECURED**, the secure Toast network configured for the restaurant location
  - Completing this field will ensure that the Toast POS handheld will warn a user if he/she is connected to a different wireless network than the one mentioned above. It will also force the POS tablets to connect to this network if it is available

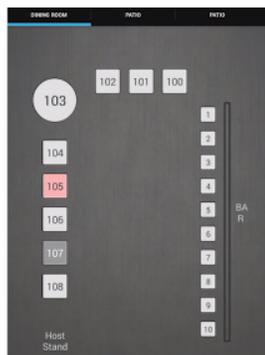
Show Send/Hold/Stay Buttons?

Send

Stay

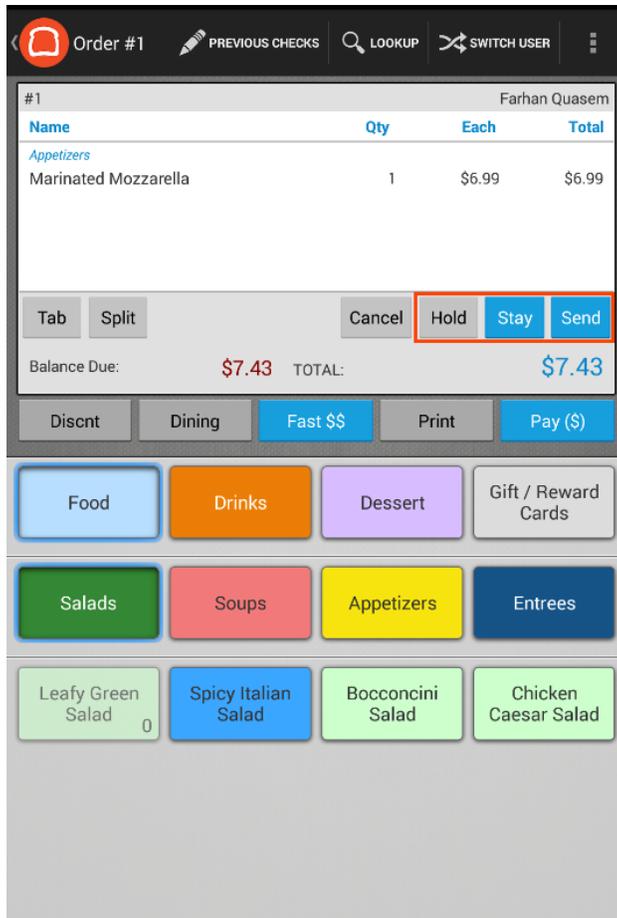
Hold

- No recommendation, as this this setting is restaurant-specific
  - Each of these buttons do the following:
    - Send: Sends the order to the kitchen
    - Stay: Allows servers to send the unsent items on a check, while keeping them on the ordering screen to continue entering items on the check to be sent next
      - This is very helpful for FSR restaurant e.g. when a large party has decided what they want to drink but are still deciding what food to order
    - Hold: Unlike Stay, selecting Hold will open a new order screen. If a table has items on hold, it will appear highlighted in pink



This is how the front-end looks if the settings above are configured in the Toast Admin website:





Orders Send Only After  
Check Is Paid

Yes

No

- Recommendation is **No**

Prompt for Tab Name?  
(Quick Order only)

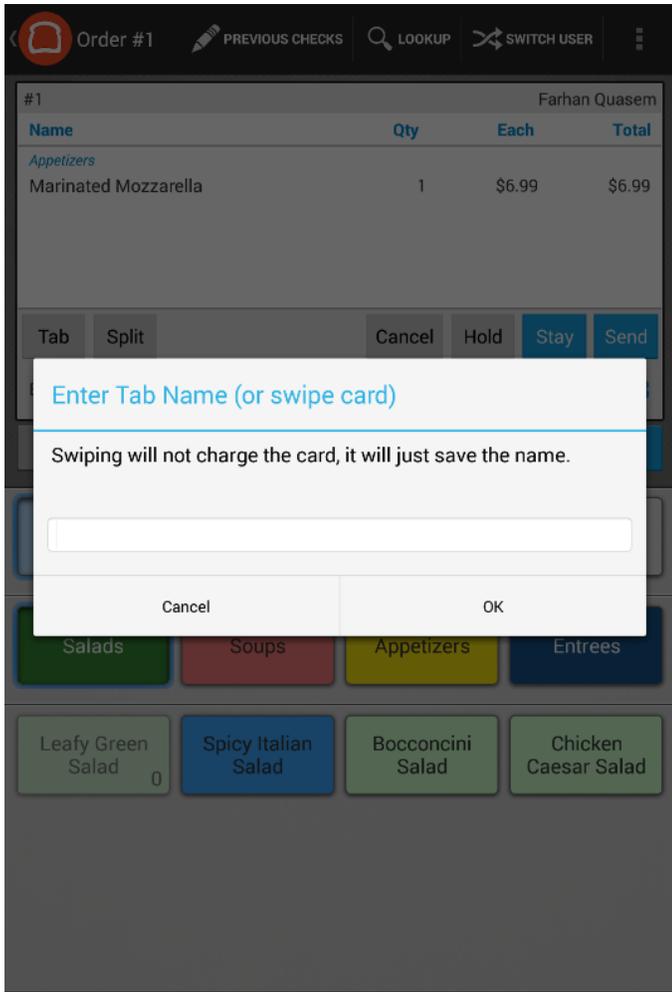
Specify "Yes" to prompt for a name in Quick Order mode when hitting the Send or Pay buttons.

Yes

No

- Recommendation is **No**
  - If enabled, selecting Send or Pay results in the following screen:





Prompt for Dining Option? (Quick Order only)

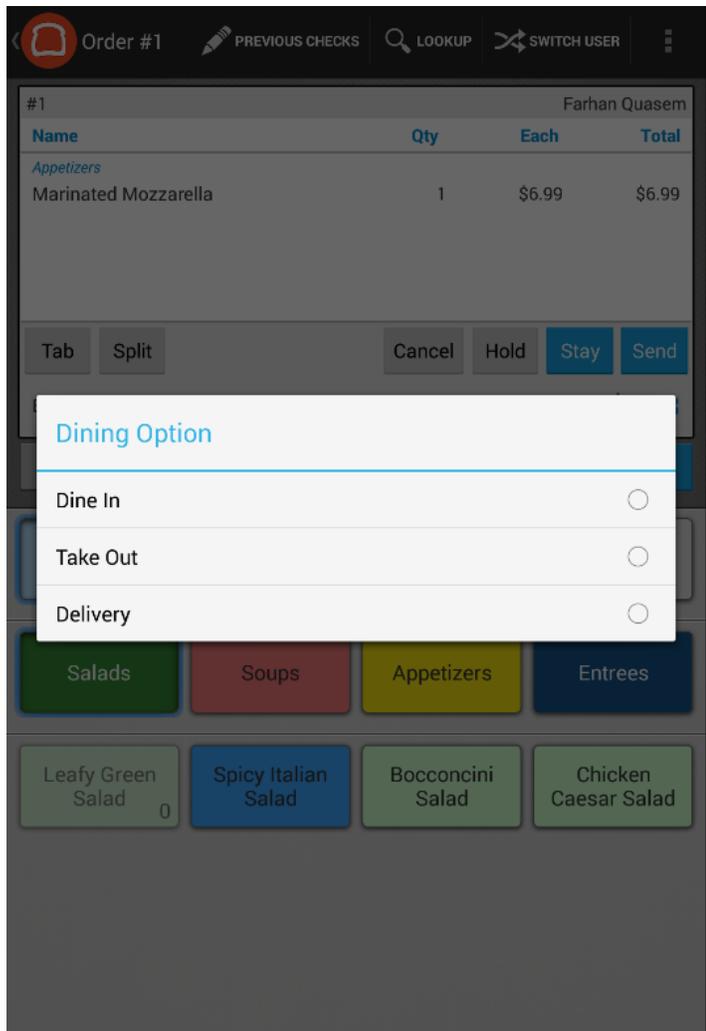
Specify "Yes" to prompt for the dining option and name in Quick Order mode when hitting the Send or Pay buttons.

Yes

No

- Recommendation is **No**
  - If enabled, selecting Send or Pay results in the following screen:





Combine Items Specify "Yes" to combine items with the same modifiers into a single item with a larger quantity before the items are sent

Yes

No

- Recommendation is **Yes**.
  - If enabled, this is how it appears on the POS:



#375, Table 102 Farhan Quasem

Name	Qty	Each	Total
<i>Entree</i>			
Steak Tips Medium	2	\$15.00	\$30.00

Steak Tips cooked to Medium appear on a single line, with quantity of 2 instead of appearing individually on two separate lines

Tab
+ Item
Split
Cancel
Hold
Stay
Send

Balance Due: \$32.10 TOTAL: \$32.10

**TEST MODE**

1 Guests
Discnt
Dining
Print
Pay (\$)

FOOD
DRINKS
Gift / Reward Cards

Salads
Appetizers
Entrees
Soup

Double Awesome	Porco Rosso	Steam Bun	Chicken Parm
Chicken Sandwich	Filet Mignon	Fish n Chips	Grilled Steak Panini
Meatball Sandwich	Steak Tips	Turkey Tips	Veal Parm



Hide Modifier Prices

- Yes - Include price of modifiers in the price of the main item
- No - Show price of each modifier separately

- Recommendation is **No** - Show price of each modifier separately

Modifier Display Mode

- Legacy
- Legacy - Flatten
- Vertical Mode
- Horizontal Mode

- Recommendation is **Vertical Mode**
  - If enabled, this is how it appears on the front-end:

The screenshot shows a POS interface for a receipt. At the top, it says "#2" and "Farhan Quasem". Below is a table with columns: Name, Qty, Each, and Total. Under the "Entree" section, there is a "Custom Pizza" with a quantity of 1 and a price of \$11.00. The modifiers listed are "Tomato Sauce", "Provolone", "Beef", "Philly Steak", and "Salami". Below the table are buttons for "Tab", "Split", "Cancel", "Hold", "Stay", and "Send". At the bottom, it shows "Balance Due: \$11.69" and "TOTAL: \$11.69". Further down are buttons for "Discnt", "Dining", "Fast \$\$", "Print", and "Pay (\$)".

Name	Qty	Each	Total
<i>Entree</i>			
Custom Pizza	1	\$11.00	\$11.00
Tomato Sauce			
Provolone			
Beef			
Philly Steak			
Salami			

Modifier Ordering Priority

Specify "Yes" to use modifier's ordering priority for modifier selection and printing.

- Yes
- No

- Recommendation is **No**



Modifier Group Sorting Defines how modifiers in the same modifier group are ordered on checks. Applies to Vertical / Horizontal modifier modes.

<input type="checkbox"/> Display in order modifiers were added
<input checked="" type="checkbox"/> Display in order modifiers are listed in their modifier group

- Recommendation is **Display in order modifiers are listed in their modifier group**
  - This allows employees to see the modifiers listed in the same order regardless of the order in which they were added. This is especially important at a location that have a prep line of toppings or items

Show Default Modifiers? Specify "Yes" to treat default modifiers as normal modifiers, or "No" to only show when removed (e.g. "NO tomato")

<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No

- Recommendation is **No**
  - This means that default modifiers only appear if they are removed, but otherwise are assumed to be a part of the item.

For example, Custom Pizza is configured to always have tomato sauce. Only when a customer requests another type of sauce does "NO Tomato Sauce" appear, as seen below:

Name	Qty	Each	Total
<i>Entree</i>			
Custom Pizza	1	\$11.00	\$11.00
Marinara Sauce			\$1.00
NO Tomato Sauce			
Beef			
Green Peppers			

Balance Due: **\$12.75** TOTAL: **\$12.75**



Fast Cash Button? Specify "Yes" to add a button that closes the order out to cash immediately in Quick Order mode

<input checked="" type="checkbox"/> Yes
<input type="checkbox"/> No

- No recommendation, as this this setting is restaurant-specific
  - Fast \$\$ is recommended whenever a transaction can be processed using exact change
  - If this setting is enabled, selecting the Fast \$\$ button will open the cash drawer without going to the Payment screen

Close After Printing Specify "Yes" to close the order screen after hitting the Print button

<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No

- No recommendation, as this this setting is restaurant-specific

Auto Switch User Specify "Yes" to go back to the passcode screen after hitting Send, Hold or Print (if configured to close the screen above), or Done on the Payment screen

<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No

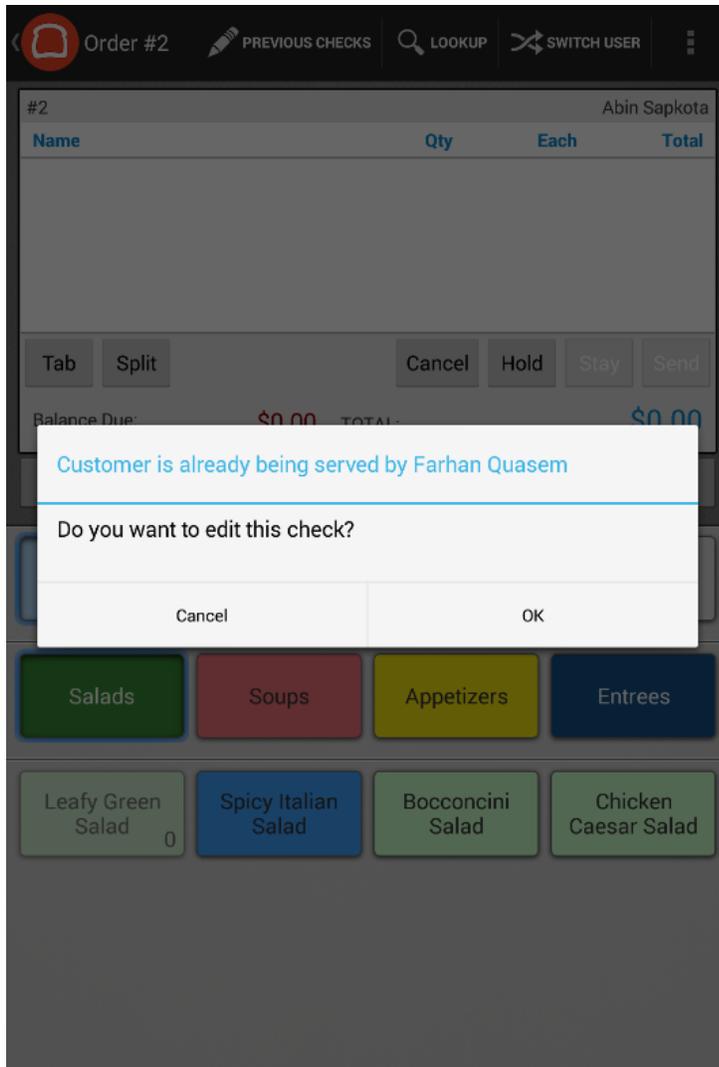
- No recommendation, as this setting is restaurant-specific.
  - This setting should be enabled in restaurants where multiple servers are using one or two terminals or if the terminals are accessible by customers

Edit Other Users Checks Confirmation

<input type="checkbox"/> Prompt user when editing another server's check
<input checked="" type="checkbox"/> Don't prompt

- No recommendation, as this setting is restaurant-specific.
  - If enabled, this is what servers see when they attempt to edit another server's check:





## Scheduled Orders

Max Future Scheduled  
Order Date (days)

The maximum number of days in the future for which you can schedule an order.

- No recommendation, as this is restaurant-specific
  - This setting may be of particular importance to locations that cater

Enable Next Day Mode  
on POS

 Yes No

- Recommendation is **No** unless this restaurant does a large number of catering orders
  - This allows you to enter in catering orders for the next day, which will not capture the payment until the next day and the sales will also go to the next day



Hour of day to schedule  
"Next Day Mode" orders

This value must be between 4 and 23 (23 matching 11 pm)

- Recommendation is **to set this to the opening time of the restaurant**

These next two options will setup when the orders placed in next day mode print to kitchen:

Minute of hour to  
schedule "Next Day  
Mode" orders

This value must be between 0-59

- Recommendation is **to set this to the opening time of the restaurant**

## Services Area Screen

Party Size

Always ask before creating a new order

Never ask

- Recommendation is **always ask before creating a new order**
  - If enabled, servers see this notification on the front-end once they select a table from Table Service mode:

122

Number of Guests Auto Gratuity OFF

1 2 3

4 5 6

7 8 9

0

← X

Clear

Done



## Tipping

Tip / Tax

Calculate Tip Before Tax

Calculate Tip After Tax

- Recommendation is *Calculate Tip Before Tax*

Customize Tip Percentages

25

%

20

%

18

%

15

%

- No recommendation, as this setting is restaurant-specific
  - The percentages that are entered here appear on the following screen once a transaction has been processed

The screenshot shows a payment interface with a total amount of \$13.86. Below the total, it says "\$13.86 + No tip". There are five tipping options: "No tip", "25% \$3.26", "20% \$2.61", "18% \$2.35", and "Other". The "No tip" option is highlighted with a blue border. Below the options, there is a signature line that says "Please sign here" with an "X" mark. Below the signature line, there is a text area that says "I agree to pay the above total amount according to my card issuer agreement. Card ending in 1111. Reference code 1JSCirHhH." At the bottom, there is a "Complete payment" button.

Large Tips Require Approval

Yes - large tip amounts will require manager override

No - large tip amounts will show a warning

Large Tip Approval Requirement Threshold

300

%

when the tip amount is above

\$

40.00



- Recommendation is **Yes - large tip amounts will require manager override**
  - 100% when the tip amount is above \$10 is a recommended configuration
- When these settings are enabled, if a large tip qualifies for approval, the manager needs to approve on the following screen:

## Shift Review/Closeout

Shift Review

- Required - waitstaff is required to close all checks and declare cash tips before clocking out
- Optional

- Recommendation is **Required - waitstaff is required to close all checks and declare cash tips before clocking out**
  - Shift Review appears to waitstaff as follows:

Shift Review
🔄
☰

- 1 closed check
▼
- Declared \$2.00 cash tips
▼
- \$0.00 paid to Farhan
Edit ▼
- Clock Out
▲

Print
Done

**Farhan Quasem**
**Mon 4/25/2016**  
4/25 9:24 AM - 4/25 11:10 AM

**EMPLOYEE ACCOUNT**

Cash in Hand	\$0.00
<i>(Cash in Drawer \$13.86)</i>	
Total Gratuity	\$0.00
Credit/Non-Cash Tips	\$0.00
<b>House owes Farhan</b>	
	<b>\$0.00</b>

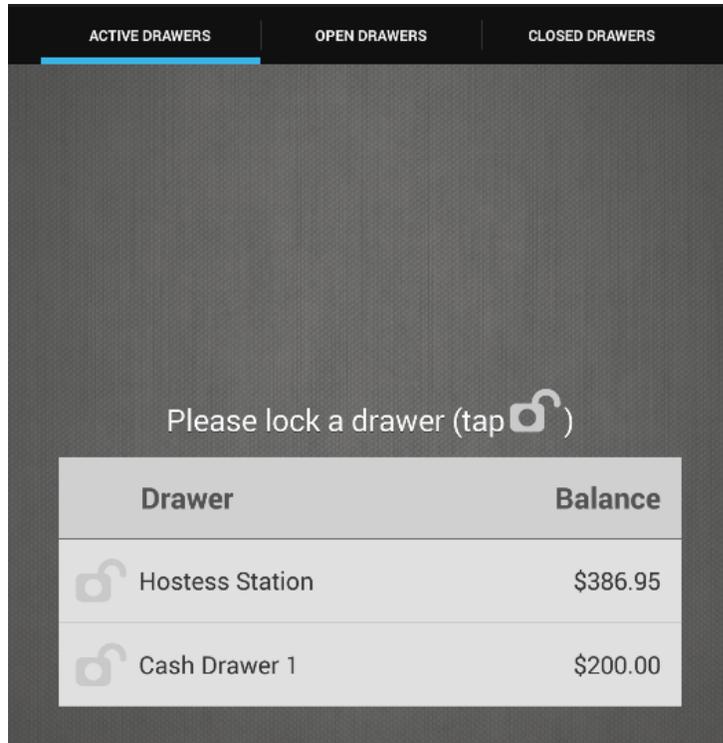
**TIPS SUMMARY**



Cash Drawer Lockdown Required Cash Drawer Lockdown must also grant Cashiers permissions for Cash Drawer Access and Cash Management (Blind or Full)

- ✓ Required - anyone clocked into a CASHIER job will be required to lock the drawer
- ✓ Optional

- No recommendation, as this setting is restaurant-specific
  - If set to Required, cashiers will have to lock into a cash drawer upon clocking in, which looks as follows:



- If set to Required, the cashier job should have the following permission enabled:

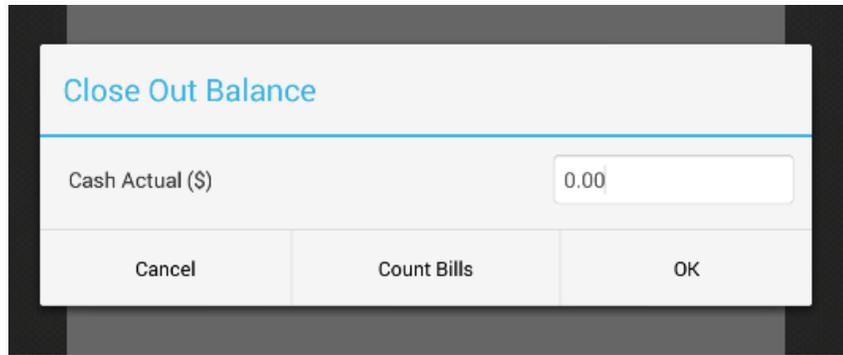
Cash Drawer Access ✓

- And one of the following two enabled:

Cash Management (Blind) ✓  
Cash Management (Full) ✓

- Blind - cashier will not see the starting balance or current balance for the cash drawer. This is recommended for cashiers who close a shift by counting cash in the drawer and not knowing what the expected amount should be, while also being able to do other cash adjustments. This is a great tool to prevent theft





- Full - cashier will see both the starting balance and the current balance

Gratuity

- Pay out gratuity at the end of the night
- Pay out gratuity through payroll

- No recommendation, as this setting is restaurant-specific

Non-Cash Tips

- Pay out non-cash tips at the end of the night
- Pay out non-cash tips through payroll

- No recommendation, as this setting is restaurant-specific

Cash Bank

- In shift review, all cash goes into server's cash bank (rare, usually only for bars)
- In shift review, cash on hand and cash in drawer are tracked separately

- Recommendation is *In shift review, cash on hand and cash in drawer are tracked separately*

Employee Account Cash Payment Collected

- Only based on checks server owns
- Include cash payments picked up for others

- Recommendation is *Only based on check server owns*

Show Cash/Credit Breakdown

- In shift review, show Cash/Credit per Sales Category
- In shift review, don't show Cash/Credit per Sales Category

- No recommendation, as this setting is restaurant-specific

Show Credit Tip Audit

- In shift review, show Credit Tip Audit
- In shift review, don't show Credit Tip Audit



- Recommendation is **In shift review, show Credit Tip Audit**
  - This allows for a more detailed look at how tips are applied to payments. This setting will print the last 4 digits of the credit card as well as the tip and total for that card on the server's shift review. A good way to quickly audit your servers.

Declare Cash Tips

Must declare cash tips before clocking out

Remove declare cash tips from shift review

- No recommendation, as this setting is restaurant-specific

Negative Declared Tips **Allows negative declared tips in shift review with manager approval**

Yes

No

- Recommendation is **No**
  - This is useful for high volume restaurants that do the majority of their tips in credit and do not have a lot of cash on hand to pay out tips

Closeout Over/Short Max  Cash drawer over / short more than this amount will require manager override

- No recommendation, as this setting is restaurant-specific

Minimum Tip Percentage  
(Declared Cash Tips)

%

- No recommendation, as this setting is restaurant-specific. Some restaurants mandate servers to declare a certain percentage of total tips as cash tips

Sales Category Tip Percentage

In shift review, show Sales Category Tip Percentages

In shift review, don't show Sales Category Tip Percentages

Sales Category	Percentage	Description	
Beer	10.0 %	To Bartender	
Appetizers	5.0 %	To Host	

- No recommendation, as this setting is restaurant-specific. If the restaurant allocates a percentage of servers' total tips to other employees, such as bartenders, hosts, and bussers, enabling this setting will allow wait staff to see what those percentages are and for whom.



- Sales categories need to be configured for this setting to be enabled

## Shift Review Report Configurations

### Shift Review Report Configurations

	Include?	Section Name
■ ■ ■ ■	✓	Employee Account
■ ■ ■ ■	✓	Tips Summary
■ ■ ■ ■	✓	Credit Tip Audit
■ ■ ■ ■	✓	Tip Sharing
■ ■ ■ ■	✓	Sales and Tax Summary
■ ■ ■ ■	☑	Cash Credit Per Sales Category Summary
■ ■ ■ ■	✓	Revenue Centers
■ ■ ■ ■	✓	Total Voids
■ ■ ■ ■	✓	Total Discounts
■ ■ ■ ■	✓	Payments Breakdown
■ ■ ■ ■	✓	Credit Card Breakdown
■ ■ ■ ■	✓	Other Breakdown
■ ■ ■ ■	✓	Employee Signature
■ ■ ■ ■	✓	Pay Outs

- No recommendation, as this setting is restaurant-specific
- Sections that have the green checkmark checked will appear on the employee's shift review report. They can be reordered by selecting the grid icon in the first column, then dragging and dropping as necessary



## Z Report Configurations

### Z Report Configurations

	Include?	Section Name
☰☰☰	✓	Sales and Tax Summary
☰☰☰	✓	Sales Categories
☰☰☰	✓	Revenue Centers
☰☰☰	✓	Payment Details
☰☰☰	✓	Server Tip Outs
☰☰☰	✓	Total Voids
☰☰☰	✓	Total Discounts
☰☰☰	✓	Credit Card Breakdown
☰☰☰	✓	Payments Breakdown
☰☰☰	☑	Labor
☰☰☰	☑	Cash Over Short
☰☰☰	☑	Employee Signature

- No recommendation, as this setting is restaurant-specific
- Sections that have the green checkmark checked will appear on the employee's Z Report. They can be reordered by selecting the grid icon in the first column, then dragging and dropping as necessary

## Time Clock

Track Unpaid Breaks  Enabled - users can start and end unpaid breaks in the Time Clock screen  
 Disabled

- No recommendation, as this setting is restaurant-specific

Track Paid Breaks  Enabled - users can start and end paid breaks in the Time Clock screen  
 Disabled

- No recommendation, as this setting is restaurant-specific

Enforce unpaid minimum time  Enabled - users may not end unpaid breaks unless 30 minutes have elapsed  
 Disabled

- No recommendation, as this setting is restaurant-specific. Required in California



### Print Clock Slips

Enabled - slips are printed automatically at clock in and clock out

Disabled

- No recommendation, as this setting is restaurant-specific

### Enforce Scheduling

Require manager approval for clock in / clock out when employees are not on schedule. Set this to No unless your scheduling software is integrated with Toast.

Yes

No

- No recommendation, as this setting is restaurant-specific
- If the restaurant's scheduling software is integrated with Toast, select Yes. This requires a third Party Partner software

### Tax Options

#### Receipt Tax Options

Display each tax rate as a separate line

Display all tax rates on one line

- No recommendation, as this setting is restaurant-specific. This refers to the customer receipt, not the report that employees see

#### Smart Tax

Yes, enable smart tax

No

- Recommendation is **No**
- Smart Tax is a setting that is appropriate for certain establishments in certain areas. Here is an example scenario:
  - If a customer orders a drink from a bar that costs \$10, then this \$10 is tax inclusive. If the customer orders the same drink with a burger that costs \$10, the total check amount \$20 will be tax exclusive, meaning that tax will be applied to this \$20



Setting Name:	Sales Categories
Location:	Other Setup/UI Options
Description:	The Sales Categories function allows a user to create and modify sales categories for a restaurant and provide descriptions for them as necessary. Sales Categories that are created need to be mapped to Menu Groups, Subgroups and/or Menu Items to work properly
Example:	There are many possible scenarios, read below for additional information

## Sales Categories

Name	Description	
Appetizers	Description	☰
Entrees	Description	☰
Beer	Description	☰
Liquor	Description	☰
Wine	Description	☰
Specials	Description	☰
Advanced Deposit	Description	☰
Beverage	Description	☰

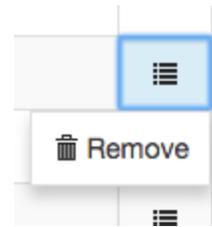
- Selecting the +Add button enables a user to create a new sales category
- Selecting the Order button enables a user to change the order of the sales categories numerically (the lower the number, the higher it appears on the list):



Order	Name
0	Appetizers
1	Entrees
2	Beer
3	Liquor
4	Wine



- Select the  button afterwards to save changes to the order
- A sales category may be removed by selecting the icon on the far right and choosing Remove



Setting Name:	Revenue Centers
Location:	Other Setup/Revenue Centers
Description:	<p>The Revenue Centers function allows a user to create and modify revenue centers for a restaurant. Using Revenue Centers in Toast can provide insightful breakdowns of where throughout the business the sales are happening</p> <p>Revenue centers have to be mapped to either a physical device or service areas (dining room, bar, etc.). This is described in greater detail below</p>
Example:	Revenue centers could include Bar, Dining Room, or Concession Stand. They are fully customizable and vary from location to location

## Revenue Centers

Name	Description	Smart Tax	
Bar	Description	✓	☰
Dining Room	Description	✓	☰
Concession Stand 1 - Drinks	Description	✓	☰
Concession Stand 1 - Food	Description	✓	☰
Music	Description	✓	☰
Club - downstairs	Description	✓	☰

**+ Add** **Order**

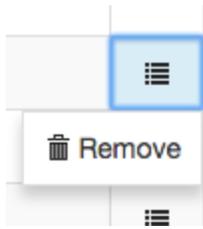
- Selecting the +Add button enables a user to create a new revenue center.
- Selecting the Order button enables a user to change the order of the revenue centers numerically (the lower the number, the higher it appears on the list):

Order	Name
0	Bar
1	Dining Room

- Select the **Done** button afterwards to save changes to the order.

- A revenue center may be removed by selecting the icon on the the far right and choosing remove





- You can also configure Smart Tax settings for revenue centers by checking or unchecking the green checkmarks

### Mapping a Revenue Center to Service Area

- Navigate to Kitchen/Dining Room -> Service Areas. A revenue center can be associated with a given service area by selecting the hyperlink in the Revenue Center column:

Primary?	Name	Auto-apply Gratuity?	Revenue Center		
<input checked="" type="checkbox"/>	Adam's Party	20.0%	None	<a href="#">Edit Tables</a>	
<input checked="" type="checkbox"/>	Hamlet's livingroom	No	Dining Room	<a href="#">Edit Tables</a>	
<input checked="" type="checkbox"/>	Ingrid's Brunch	No	Dining Room	<a href="#">Edit Tables</a>	
<input checked="" type="checkbox"/>	special event	No	Dining Room	<a href="#">Edit Tables</a>	

- On the screen that follows, the appropriate revenue center can be chosen from the dropdown as shown here:

**Basic**

Name

Primary?  Yes, this is the primary service area  
 No, this is not the primary service area

Revenue Center

**Auto-applied Gratuity**

Auto-apply Gratuity?

Gratuity

None

Bar

Dining Room

Concession Stand 1 - Drinks

Concession Stand 1 - Food

Music

Club - downstairs

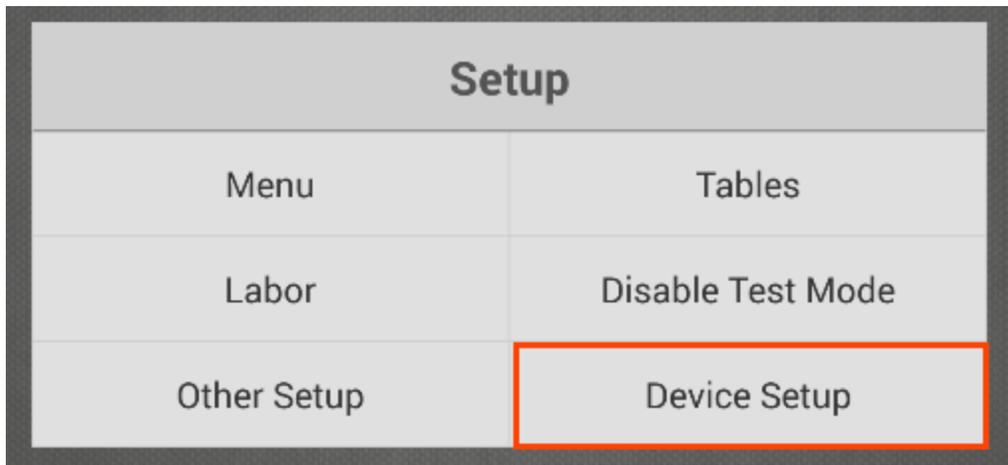


## Mapping a Revenue Center to a Device

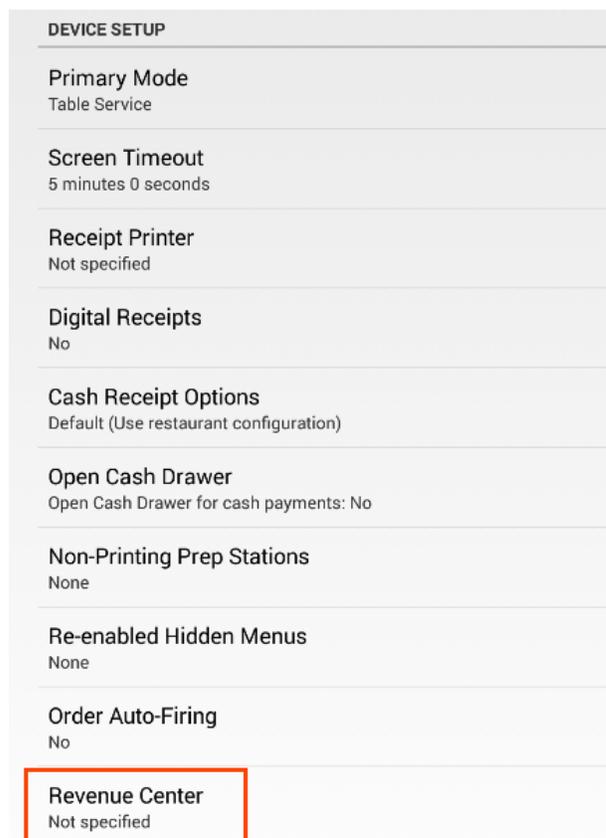
- Navigate to the Settings screen on the device by selecting the Toast icon in the top left-hand corner



- Scroll down and select Device Setup under Setup



- Select Revenue Center



- Then choose the specific Revenue Center and select Continue



Setting Name:	Device Groups
Location:	Other Setup/Device Groups
Description:	The Device Groups functionality allows a user to organize tablets into distinct groups. This allows for greater control over how the tablets sync and communicate with one another
Example:	Device groups can be set up any way a user sees fit. They are fully customizable and vary from location to location

- Device Groups are configured here:

### Device Groups

Device groups control how orders get synchronized among tablets.

Name

Tablets

+ Add

- To associate a device group with a particular device, navigate to Device Setup and choose the appropriate device groups here:





Cash Receipt Options

Default (Use restaurant configuration)

Open Cash Drawer

Open Cash Drawer for cash payments: No

Non-Printing Prep Stations

None

Re-enabled Hidden Menus

None

Order Auto-Firing

No

Revenue Center

Not specified

Primary Service Area

(Default)

Device Default Dining Option

Off (Restaurant Level Default is None)

Device Group to Send

None

Device Groups to Receive

Filter which orders are receive by Device Group

Lock Android Down

This functionality is only available in Android 5.0 or greater

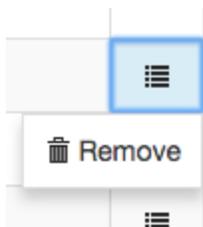


Setting Name:	Pay Out Reasons
Location:	Other Setup/ Pay Out Reasons
Description:	The Pay Out Reasons function allows a user to designate the various pay out reasons that employees at a restaurant can choose from when opening a cash drawer to perform a pay out
Example:	Pay Out reasons can be set up any way a user sees fit. They are fully customizable and vary from location to location

### Pay Out Reasons

Name	Active	Description	
Office Supplies	✓	Description	☰
Staff Bday Cake	✓	Description	☰
Kitchen Supplies	✓	Description	☰
Donation	✓	Description	☰

- The +Add button allows a user to add new pay out reasons
- The Order button allows a user to change the order of the pay out reasons numerically (the lower the number, the earlier it appears on the list)
- A pay out reason may be removed by selecting the icon on the the far right and choosing remove.



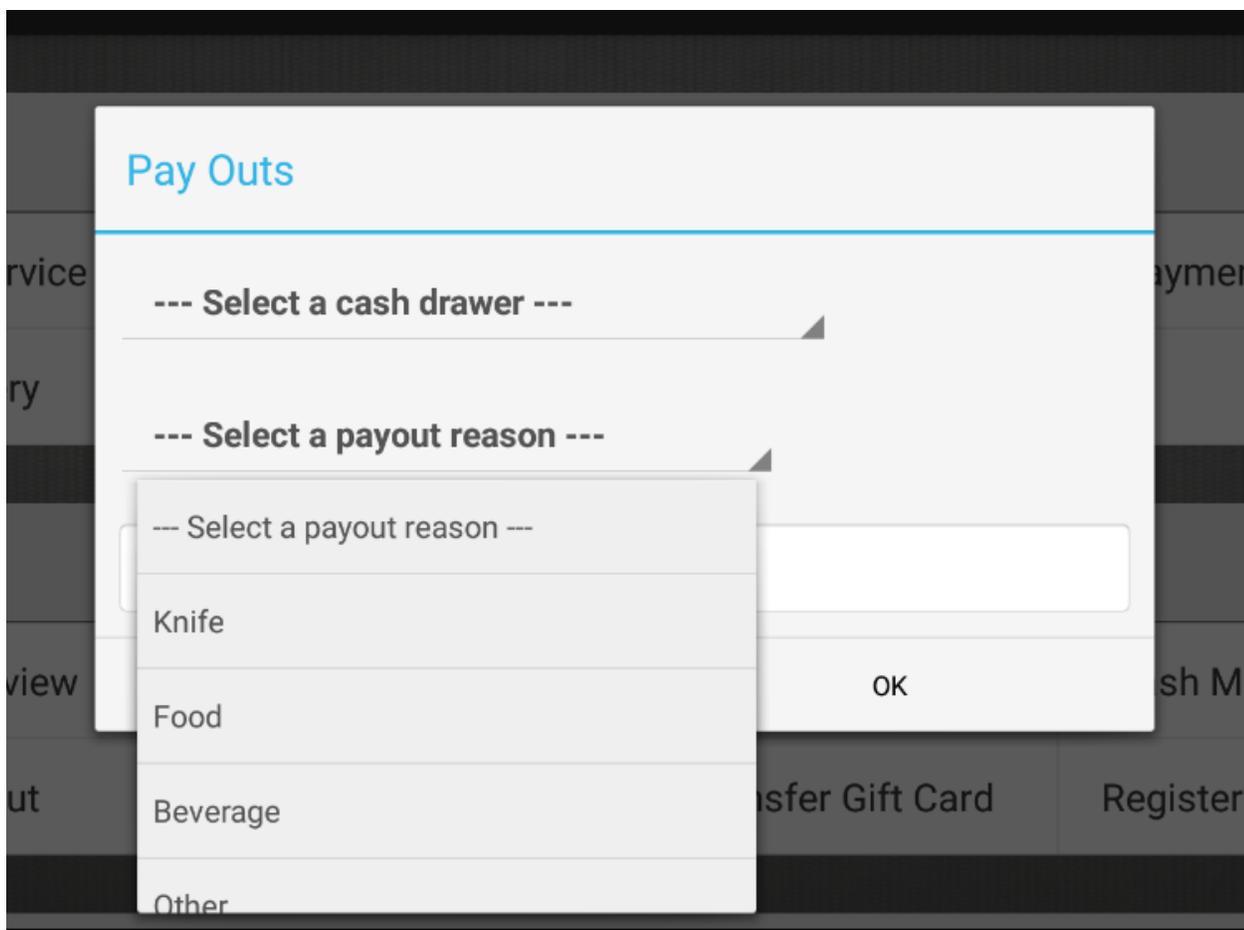
- If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

### Pay Out Reasons

Number	Name	Active	Description	Target	Owner	
78242182	Office Supplies	✓	Description	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
78242184	Staff Bday Cake	✓	Description	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
78242186	Kitchen Supplies	✓	Description	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
78242188	Donation	✓	Description	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰
122318867	Refund	✓	Description	Toast Bar & Lounge ▾	Toast Bar & Lounge ▾	☰

[Show Archived](#)

- Pay out reasons appear on the tablet as follows:





Setting Name:	GL Accounts
Location:	Other Setup/GL Accounts
Description:	The GL Accounts function allows a user to set up General Ledger accounts and map them to data in Toast
Example:	GL Accounts can be set up any way a user sees fit. They are fully customizable and vary from location to location

Here is an example of how various General Ledger accounts can be set up in the system and mapped accordingly:

Home / GL Accounts Save

+ Add GL Account

	GL Code	Description	Mapped?	
⋮	011102	Cash Payments	Yes	🗑
⋮	011103	Credit Card Deposits	Yes	🗑
⋮	011104	Other Payments	Yes	🗑
⋮	012130	Deferred Revenue	Yes	🗑

- Specific codes and descriptions can be set for each GL account. The mapping is done by associating an account with an entity using the dropdown menus:

Map GL Accounts

Entity	GL Code
Tax	012250 - Tax
Cash	011102 - Cash Payments
Cash Not Collected	
Credit Card Payments (V/MC/D)	011103 - Credit Card Deposits
Credit Card Fees (V/MC/D)	011103 - Credit Card Deposits

Each of these entities can be mapped to a GL code using the dropdown menus

- 011102 - Cash Payments
- 011103 - Credit Card Deposits
- 011104 - Other Payments
- 012130 - Deferred Revenue
- ✓ 012250 - Tax
- 017442 - Over/Short
- 017605 - Discounts
- 024100 - Food Sales
- 024200 - Beer Sales
- 024300 - Wine Sales
- 024400 - Liquor Sales
- 024500 - Gift Card Sales
- 990003 - Tips
- 990005 - Cash Adjustments
- 990009 - Gratuities
- 990008 - Refunds
- 908953 - Specials
- 012131 - Gift Card Redeem



If a multi-location organization has enabled Master Menu Management, Targets and Owners will appear (for more information, refer to the Master Menu Management section of this guide):

### Accounting Report Setup

Name	Target	Owner	
<a href="#">GL Accounts</a>	Toast Bar & Lounge ▼	Toast Bar & Lounge ▼	☰

### Basic

Name  Only used in admin pages to help identify this configuration

Number 16396605

Target  ▼

Owner  ▼



Setting Name:	Takeout/Delivery
Location:	Other Setup/Takeout/Delivery
Description:	The Takeout/Delivery function allows users to customize settings and configurations for takeout and delivery orders
Example:	A restaurant manager decides to offer both takeout and delivery options to his customers and wants to set up both modalities on the Toast Admin Website

## Takeout/Delivery

Delivery Enabled?

Enable Delivery

Disable Delivery

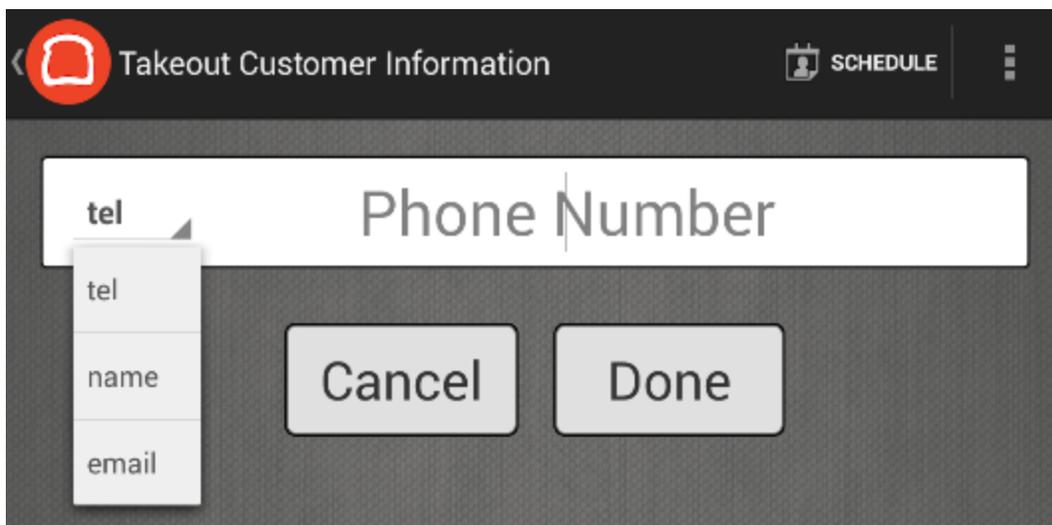
- Delivery will need to be enabled if a restaurant wants this functionality

Takeout Customer Information

Prompt for takeout customer information (phone and name)

Don't prompt

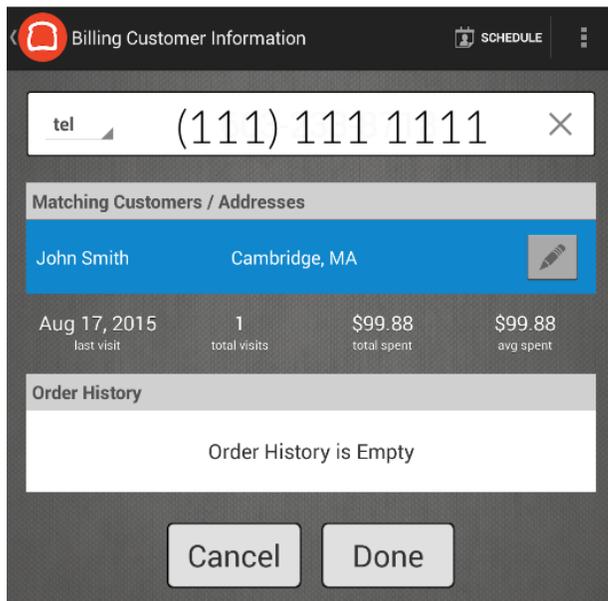
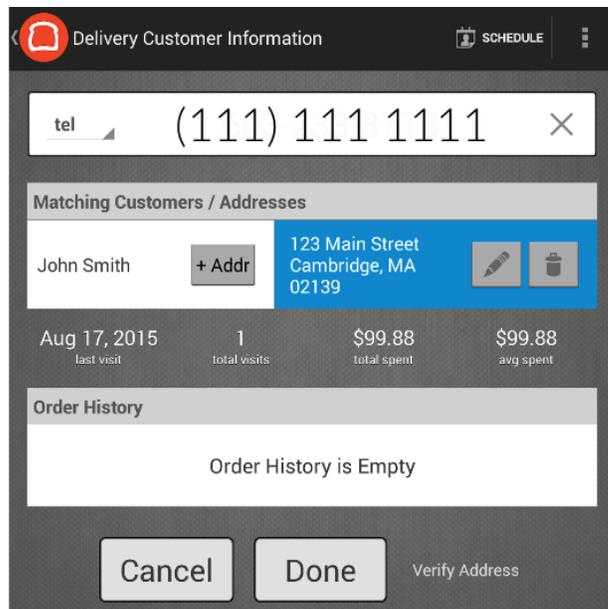
- Recommendation is *Prompt for takeout customer information (phone and name)*
- This is how it appears on the front-end when a dining option of Take Out is selected:



**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

- No recommendation, as this this setting is restaurant-specific.
- This setting only applies to delivery orders and it is important to keep the following in mind:
  - Billing customer is the individual being billed for the delivery order
  - Delivery customer is the individual to whom the delivery is being made
    - They look as follows on the front-end of the system:



## Delivery Fee

[Configure delivery service fees](#)

Selecting the above will take a user to the Service Charges section (read more about that here)

## Receipt Printing

Takeout / Delivery Printer  ▼ Receipt with takeout / delivery info will print here. [configure printers](#)

- Choose the printer that will print take/out delivery info receipts

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

- Recommendation is *Yes (always print paper receipts for delivery checks)*

## Availability

This section controls when online ordering is available to customers, and which times are valid for scheduled online orders. Note that order scheduling is available at all times. The settings configured here are relative to what is set in [Hours/Services](#)

Start accepting Takeout orders  minutes after the restaurant opens

Start accepting Delivery orders  minutes after the restaurant opens

Stop accepting Takeout orders  minutes before the restaurant closes

Stop accepting Delivery orders  minutes before the restaurant closes

## Default Preparation Time

This is where a user can set the default preparation time for takeout and delivery orders, in minutes. Must be an increment of 5 minutes. This can be overridden for individual orders.



Takeout Prep Time  minutes to prepare order

The first ASAP order can be accepted at 10:30 AM for today's hours  
The last ASAP order can be accepted at 10:30 PM for today's hours

Delivery Prep Time  minutes to prepare and deliver order

These times adjust according to the values entered

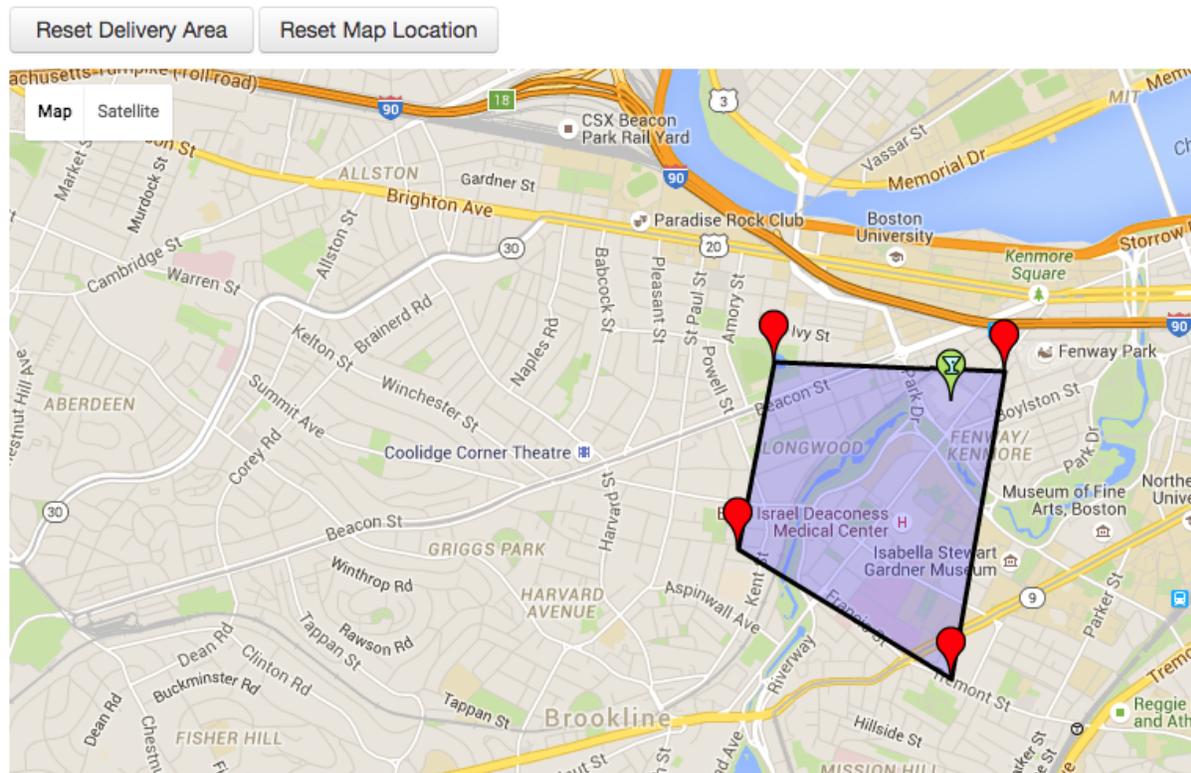
The first ASAP order can be accepted at 10:30 AM for today's hours  
The last ASAP order can be accepted at 10:00 PM for today's hours

## Delivery Area

This nifty tool allows a user to designate the delivery area by clicking around on a map:

### Delivery Area

Click on the map to start drawing delivery area.



Setting Name:	Online Ordering
Location:	Other Setup/Online Ordering
Description:	The Online Ordering function allows users to customize settings and configurations for this Toast add-on module
Example:	A restaurant manager decides to offer online ordering to his customers and wants to set up this modality on the Toast Admin Website

## Toggle Online Ordering

Toggle

- Enable online ordering
- Temporarily disable online ordering

- Online Ordering will need to be enabled if a restaurant wants this functionality

## Approval

Approval Mode

- Approve manually
- Send orders directly to kitchen
- Use rules

**Important!** Order Auto-Firing must be enabled on exactly one device at your restaurant. See Device Setup on the tablet home screen.

- No recommendation, as this setting is restaurant-specific
- If **Use rules** is enabled, the section below named Approval Rules will appear.
  - Order Auto-Firing must be enabled on exactly one device at your restaurant. This is configured on the Device Setup Screen



## 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	
<input checked="" type="checkbox"/>	Cash Threshold	Approval Needed	\$ 0.00	Cash orders at or greater than this amount.
<input checked="" type="checkbox"/>	Credit Minimum	Approval Needed	\$ 0.00	Credit orders under this amount.
<input checked="" type="checkbox"/>	Delivery Minimum	Approval Needed	\$ 0.00	Delivery orders under this amount.
<input checked="" type="checkbox"/>	Total Amount	Approval Needed	\$ 0.00	Orders whose post-tax total at or greater than this amount

- Enable a rule by checking the green checkmark in the first column.
- Enabled rules are evaluated in this order: Reject, then Approval Needed

## Scheduling

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

Yes, customers may schedule orders

No, all orders will be fulfilled as soon as possible

- No recommendation, as this this setting is restaurant-specific
- If enabled, customers will be able to schedule delivery orders for some time in the future
  - Order Auto-Firing must be enabled on exactly/at least one device at your restaurant. This is configured on the Device Setup Screen

## Dining Options

Takeout Option

Delivery Option

- Recommendations are those shown above, but if a restaurant has configured other dining options, then those would need to be selected accordingly



## Server Selection

Online Order Server

Assigned by auto-firing tablet ▾

- No recommendation, as this this setting is restaurant-specific.
- If a restaurant chooses to designate a particular server as the online ordering server, that server's name needs to be selected from this dropdown

## Credit Card Payments

Allow Credit Card Payments

- Never
- Only for ASAP orders
- For all orders (including future orders)

- No recommendation, as this setting is restaurant-specific
- If Only for ASAP orders is enabled, the section below will appear:

**Allow Cash Payments** Controls whether or not cash payments are allowed in addition to credit card payments.

- Yes
- No

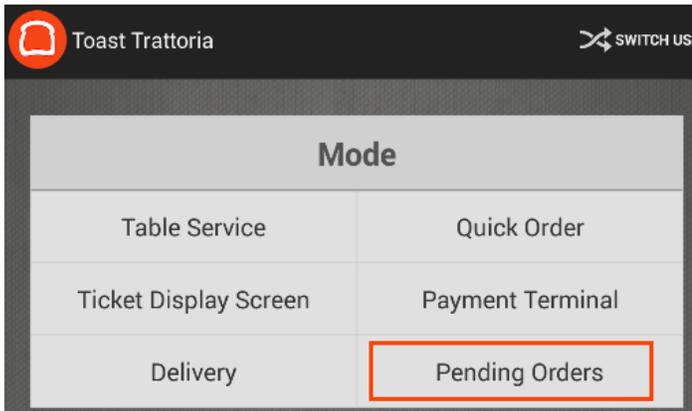
This is how a pending online order appears on a tablet for approval (this is configured in Notification Setup):

The screenshot shows a tablet POS interface. At the top, there's a header with a notification icon (a red circle with a white exclamation mark) and the name 'Rob Sutherland'. Below the header, there's a 'NOTIFICATIONS' section with a blue background and a 'Clear All' button. A notification message reads: 'You received an online (Take Out) order #16 from Rob Toast' with a timestamp of '01:23 PM' and a close button. Below the notification, there's a grid of menu items: Ramen, Add-ons, Small Plates, Gluten Free Soup Noodles, Miso Ramen, Original Tonkotsu..., Soy Ramen, Spicy Tonkotsu Ramen, Vegetarian Ramen, and Seafood Ramen. At the bottom, there's a summary table with columns for 'Tab', '+ Item', 'Split', 'Cancel', 'Hold', and 'Send'. The table shows: Discounts: \$0.00, Subtotal: \$0.00, Tax: \$0.00, TOTAL: \$0.00, Balance Due: \$0.00, and Tips (0%): \$0.00.

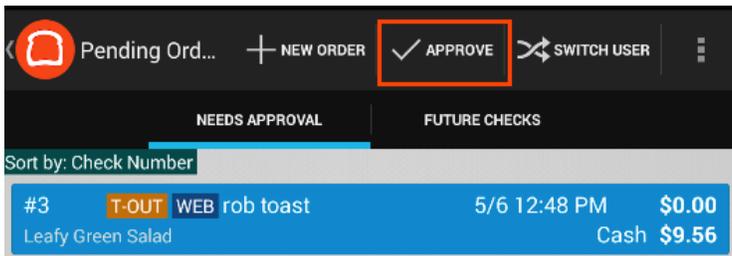
Tab	+ Item	Split	Cancel	Hold	Send
Discounts:		\$0.00	TOTAL:		\$0.00
Subtotal:		\$0.00	Balance Due:		\$0.00
Tax:		\$0.00	Tips (0%):		\$0.00



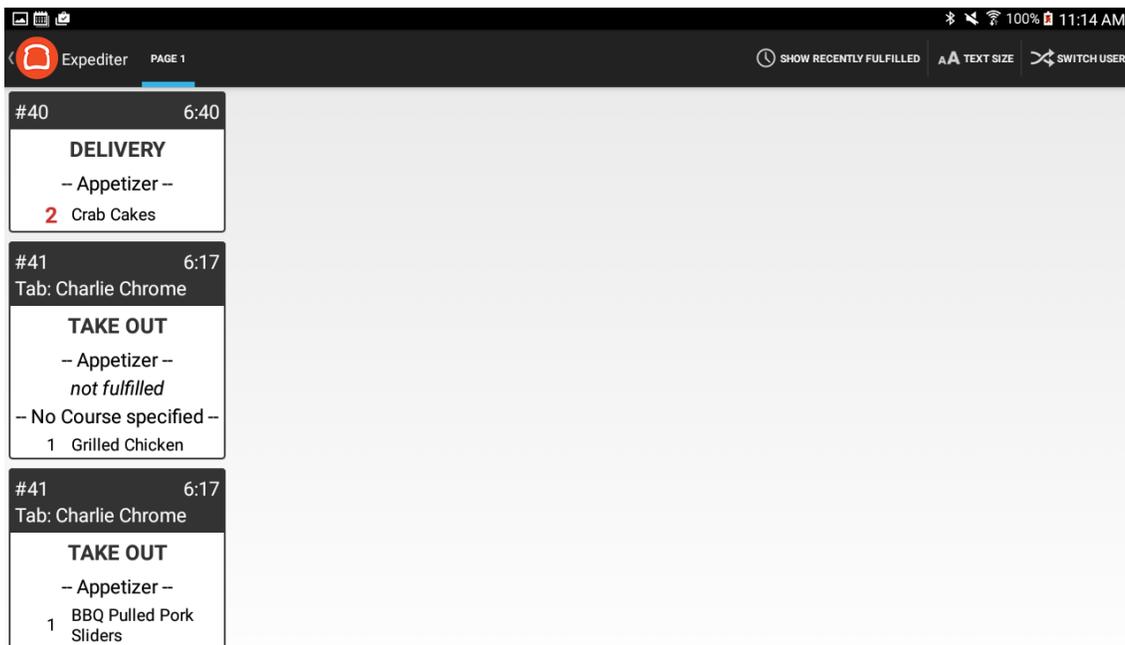
Then, an employee with the correct permission configured ("Pending Orders" under POS Access) can go in and approve the order by navigating to Pending Orders:



And selecting the order, then tapping Approve:



This is how delivery and takeout orders appear on a KDS:



# Other Setup

Setting Name:	Manager Log Setup
Location:	Other Setup/Manager Log Setup
Description:	The Manager Log Setup function allows a user to configure the Manager Log
Example:	See below

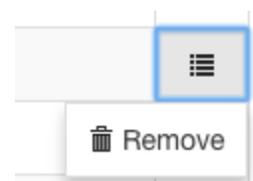
A category can be added by simply pressing the “Add” button. The order of the categories can also be setup by pressing the “Order” button:

## Configure Categories

Category Name
Guest Notes
Events
Weather
Repairs/Maintenance
Excessive Comps/Voids
Notes for Next Day Manager
Employee Discipline

**+ Add**   **Order**

A category can be removed by selecting the icon on the far right and choosing Remove:



Setting Name:	Notification Setup
Location:	Other Setup/Notification Setup
Description:	The Notification Setup function allows a user to set up three types of notifications for the restaurant
Example:	A restaurant manager wants his staff to be notified every time a new online order is placed

Enabled Notifications

- New online orders
- Fulfilled tickets (alerts person who placed the order)
- Offline payment processing failed (alerts person who processed payment)

- No recommendation, as this setting is restaurant-specific



Setting Name:	Restaurant Groups
Location:	Other Setup/Restaurant Groups
Description:	The Restaurant Groups functionality allows a user to organize restaurant into one or more groups. This allows for easier management of multi-location accounts
Example:	There is a 100 unit restaurant chain with locations in multiple states. A restaurant management decides to create groups to better manage across locations. Three restaurant groups are created - New England Stores, Midwest Stores, West Coast Stores. One or more restaurants can be assigned to each of these groups

Create New Group

Show Archived Groups

Name	Description	Members
<a href="#">Toast Demo Group</a>		<ul style="list-style-type: none"> <li>• Toast Bar &amp; Lounge</li> <li>• Toast - Katie's Restaurant</li> <li>• Toast Restaurant</li> <li>• Toast Restaurant - Boston</li> <li>• Toast Tab &amp; Grill N1</li> <li>• Toast Tab Night Club</li> <li>• Toast - Ted's Place</li> </ul>

- To configure a new group, select the Create New Group button
- To edit an existing group, select the name from the first column, then configure changes as necessary:

[Home](#) / [Restaurant Groups](#) / [Edit Group](#)



### Edit Group

Name

Description

---

### Manage Group

Use this section to add/remove restaurants, or entire groups of restaurants, to/from this group.

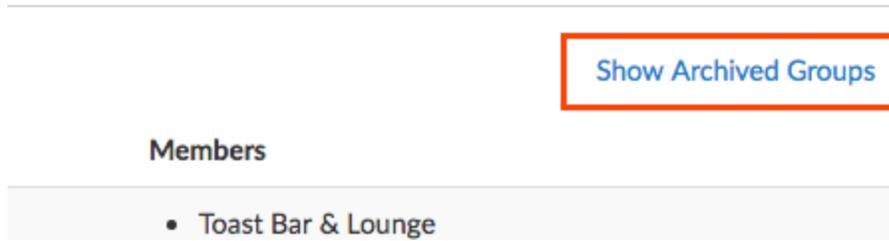
Member Restaurants Subgroups

- To archive a group, select the icon next to the green Save button, then choose Archive





- Archived restaurant groups can be accessed from the main window by selecting the Show Archived Groups link in the top right corner



Setting Name:	Financial Setup
Location:	Other Setup/Financial Setup
Description:	The Financial Setup functionality allows a user to configure a business's financial information including legal name, Federal Tax ID, and account information
Example:	This setting is initially setup by the Toast Onboarding team based on the information gathered from the customer. The settings here should not be changed without consultation and approval from the customer

Please contact [services-ops@toasttab.com](mailto:services-ops@toasttab.com) to change your legal and banking information

### Legal Info

Legal Name

Federal Tax ID

### Accounts

Deposit Account

Fees Account

Available Accounts	Nickname	Routing	Account	Validation
	Fake	053203579	*****3123	<a href="#">start validation</a>

- No recommendation, as all of this information will vary from restaurant to restaurant
- Please contact [services-ops@toasttab.com](mailto:services-ops@toasttab.com) to change legal and banking information



Setting Name:	Contact Settings
Location:	Other Settings/Contact Settings
Description:	The Contact Settings function allows a user to configure what email notifications get sent to what users
Example:	A restaurant manager decides to create a new email list for owners and configure them to receive Toast release notes

## Email Contact Settings

Nightly Summary Managers ▼

Release Notes Managers ▼

Incoming Orders Managers ▼ Notification for new toast online orders.

Delivery Orders Managers ▼ Notification for new delivery orders.

Finance Emails Finance

- No recommendation, as these settings are restaurant-specific
- The Finance Emails by default are configured to be sent to those in the Finance Email List

## Email Lists

List Name	Members			
Finance	<span>Farhan Quasem</span>	Please contact Toast to change this list		
Managers	<span>Cameron Olshansky</span> ✕	<a href="#">add users</a>	<a href="#">add external email</a>	
Owners	<span>Farhan Quasem</span> ✕	<a href="#">add users</a>	<a href="#">add external email</a>	
Shift Leaders	<span>Sally O'Malley</span> ✕	<a href="#">add users</a>	<a href="#">add external email</a>	

[+ Create Email List](#)

- The Finance Email List cannot be edited by users - only Toast can change the configuration of this list
- To add users to a list, select the add users link in the third column
- To create a new email list, select the + Create Email List button



Setting Name:	Data Exports
Location:	Other Setup/Data Exports
Description:	The Data Exports function allows a user to configure what parameters should be captured in data exports that are generated
Example:	There are many possible scenarios, read below for additional information

- No recommendation, as these settings are restaurant-specific
- Enable and disable sections of the data export by checking/unchecking the green checkmarks next to the section headers:

Orders  Enabled  Disabled

- When enabled, the corresponding columns will appear below the section header:

	Include?	Column Name
	<input checked="" type="checkbox"/>	Location
	<input checked="" type="checkbox"/>	Order Id
	<input checked="" type="checkbox"/>	Order #

- Columns can be included/excluded by selecting the green checkmarks. They can be reordered by selecting the grid icon in the first column (to the left of the Include? column), then dragging and dropping as necessary



Setting Name:	Barcode Config
Location:	Other Setup/Barcode Config
Description:	The Barcode Config function allows a user to configure barcode settings
Example:	See below

## Amount Check Digit

---

Validate that the check digit on the amount is correct?

Yes

No, that digit will be ignored.

- Recommendation is **Yes**
  - Doing so ensures that the digit is calculated using an algorithm to determine whether or not the barcode was legitimately created



Setting Name:	Kiosk Setup
Location:	Other Setup/Kiosk Setup
Description:	The Kiosk Setup function allows a user to configure the Background Welcome Image for a kiosk
Example:	See below

## Appearance

Background Welcome Image



Choose Image



Select Choose Image to upload an image as the background welcome image. Selecting the trash icon will delete the selected the image.



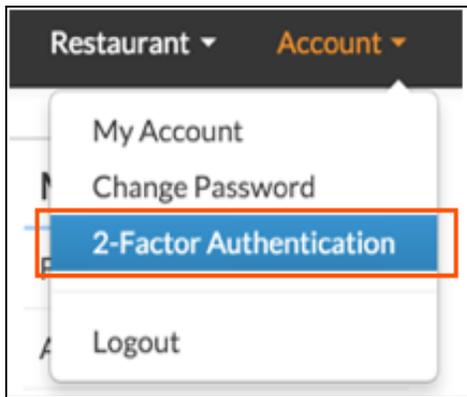
## 2-Factor Authentication

2-Factor Authentication can be configured to increase the security of employee accounts for your restaurant.

When 2-Factor Authentication is enabled, employees who log into the Toast Admn Website are required to enter a 6-digit time-sensitive code in addition to a password. This code can be obtained by setting up the Google Authenticator app on a phone, or the codes can be texted to that phone at login time. 2-Factor Authentication is an optional setting for users in Toast, enabled at the individual employee level.

- To enable it, an employee must sign into their Toast account by logging into toasttab.com and selecting the Account dropdown

Note: The employee, not an administrator, must enable this feature since the employee will need to interact with their phone to validate it.



- Follow the instructions on the page. Codes can be delivered through the Google Authenticator app or via text message
  - Recommendation: **Set up both**. Google Authenticator will be the fastest way to log in, but having text messages as a backup in case you remove the app or similar is a good idea



2-factor verification is currently disabled for this account.

### Text Message Setup

1. Enter your number, request a validation code      2. Enter the validation code      3. Enable 2-Factor Auth

603-555-1234      Send Code      811111      Validate      **Enable**

Code sent      Code validated

### Google® Authenticator Setup

1. Download the Google® Authenticator app      2. Scan the barcode to set up your account      3. Enter a code to validate your setup






6-digit code      Validate

7UP3CDZ64PTQ5NLPVVVBV3SXC6ZBZOZK

- Print out the recovery codes and store them in a safe location. These emergency one-time-use codes can be used if you lose or replace your phone. They will allow you to get into your account and update your 2-Factor settings

### Recovery Codes

Recovery codes are emergency codes that can be used if you lose your phone. Each code can only be used once. It is recommended that you print out these codes and store them somewhere secure.

Show Codes      Generate New Codes

17197848	74369388
90915607	49202360
28905495	19169293
01508490	36446064
19995978	10573151

## Recovery / Lock-out Assistance

If a user becomes locked out of their account because they lose their phone, Toast support or restaurant administrators can assist in getting back into the account.

If a restaurant administrator has the "User Permissions" permission, he/she will be able to temporarily disable 2-Factor Authentication on the account for 10 minutes to allow that employee to reconfigure their 2-Factor settings.

1. From the restaurant's admin home page navigate to the Employees page
2. Click the employee's name in the employee list (note: not the 'edit' pencil icon)



Home / Employees

+ Add User ▾

Active Employees Inviited Employees

	Last Name ▲	First Name ◊	Employee ID ◊	Job(s) ◊	Email ◊	
	Admin	Andy	5314	Manager	admin@gmail.com	
	Admin	Toast	5		admin@toasttab.com	
	<b>Bartender</b>	<b>Britanny</b>	5333	Bartender	brittany_user@toasttab.com	

3. Click the 2-Factor Setup button in the toolbar

Home / Employees / Britanny Bartender

Edit Change Password  **2-Factor Setup** Audit Changes Delete

**Britanny Bartender** -  
brittany\_user@toasttab.com

4. Click the Disable for 10 Minutes button - for the next 10 minutes, the employee will be able to log in to Toast without entering a 2-Factor code

- Once that 10 minutes has past, they will not be kicked out. But, if they go to any sensitive page that normally requires re-entry of their password (e.g. editing other users) they will be required to enter a code to continue

**Enable / Disable**

2-factor verification is currently enabled

**Disable for 10 Minutes** **Disable Permanently**

**Text Message Setup**

Current phone number: \*\*\*-\*\*\*-9680

5. If you want to immediately re-enable 2-factor for any reason during this 10 minutes, you can do so from the same page



## Enable / Disable

2-factor verification has been temporarily disabled. It will be re-enabled at 11:38 AM

[Re-enable Now](#)

## Text Message Setup

Current phone number: \*\*\*-\*\*\*-9680



# Master Menu Management

For multi-location organizations that have enabled Master Menu Management, **target** and **owner** emerge as settings to be mindful of as settings are adjusted on the Toast Admin Website.

Target: Target refers to the restaurant that displays the menu. If the target of a menu is the corporate level, then this menu is shown at all locations

Owner: The owner determines who can edit the entity. If the owner of a menu is the corporate level, only corporate level users can edit that menu

## Menu

A menu can be configured to include a target and owner

### Menus

Number	Name	Target	Owner	
15858136	Food	Toast Bar & Lounge	Toast Bar & Lounge	☰

### Basic

Name

POS Name  Alternative shortened name for POS

Button Color 

Number 15858136

Target	<input type="text" value="Toast Bar &amp; Lounge"/>
Owner	<input type="text" value="Toast Bar &amp; Lounge"/>



The same applies to menu groups:

### Basic

---

Name

POS Name  Alternative shortened name for POS

Button Color 

Number 15375828

Target

Owner

And menu items:

### Basic

---

Name

POS Name  Alternative shortened name for POS

Kitchen Name  Alternative name used for the kitchen display screen or tickets

Button Color 

KDS Color

Number 112608834

Target

Owner



## Open Items

### Open Items

Number	Name	Target	Owner	
15395706	<a href="#">Open Food</a>	Toast Bar & Lounge	Toast Bar & Lounge	☰
15395707	<a href="#">Open Liquour</a>	Toast Bar & Lounge	Toast Bar & Lounge	☰
25748822	<a href="#">Open Pre-Order</a>	Toast Bar & Lounge	Toast Bar & Lounge	☰
47328565	<a href="#">Open Rental</a>	Toast Bar & Lounge	Toast Bar & Lounge	☰
57196875	<a href="#">Open Retail</a>	Toast Bar & Lounge	Toast Bar & Lounge	☰

## Pre-Modifier Groups

### Pre Modifiers

Number	Name	Members	Default?	Target	Owner	
14733383	Pizza	<a href="#">Add</a> , <a href="#">On The Side</a> , <a href="#">NO</a> , <a href="#">Lite</a> , <a href="#">Only</a> , <a href="#">Extra</a>	☑	Toast Bar & Lounge	Toast Bar & Lounge	☰
63095840	Village Fish PreM	<a href="#">No</a> , <a href="#">Add</a> , <a href="#">Extra</a>	☑	Toast Bar & Lounge	Toast Bar & Lounge	☰
81649451	Weight	<a href="#">3lb</a> , <a href="#">4lb</a> , <a href="#">5lb</a> , <a href="#">6lb</a> , <a href="#">7lb</a> , <a href="#">8lb</a> , <a href="#">9lb</a> , <a href="#">10lb</a>	☑	Toast Bar & Lounge	Toast Bar & Lounge	☰
122104086	Salad	<a href="#">Extra</a> , <a href="#">Lite</a> , <a href="#">Side</a> , <a href="#">NO</a>	☑	Toast Bar & Lounge	Toast Bar & Lounge	☰
130786883	Burger	<a href="#">Add</a> , <a href="#">No</a> , <a href="#">Extra</a> , <a href="#">Double</a>	☑	Toast Bar & Lounge	Toast Bar & Lounge	☰

+ Add

Order

[Show Archived](#)

## Price Levels

### Price Levels

Number	Name	Price	Target	Owner	
49181349	<a href="#">Pizza</a>	\$8.00 - \$12.00	Toast Bar & Lounge	Toast Bar & Lounge	☰
53872301	<a href="#">Domestic Beer</a>	\$2.00 - \$3.50	Toast Bar & Lounge	Toast Bar & Lounge	☰

+ Add

Order

[Show Archived](#)

## Advanced Properties - Bulk Editor

[Show Archived Menus / Groups](#)

Show/Hide: Target, Owner, Number, Prep ▾

		Number	Target	Owner	Prep Stations
<input type="checkbox"/>	<a href="#">+</a> <b>Food</b>	15858136	Toast Bar & Lounge	Toast Bar & Lounge	Food

