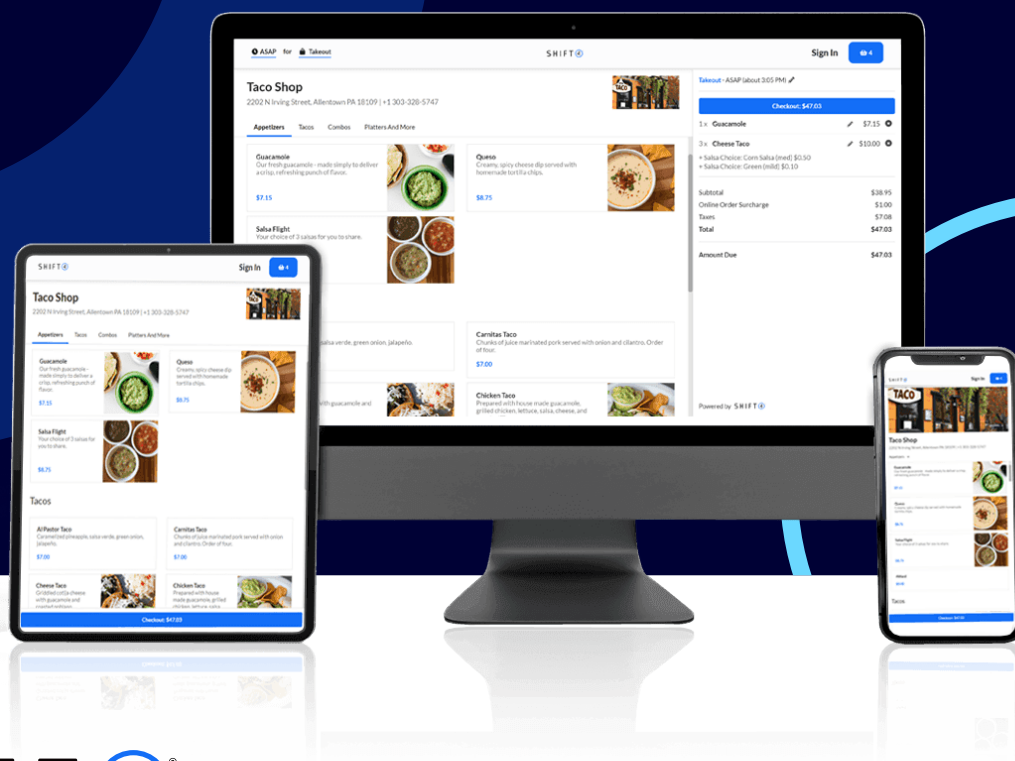




Online Ordering and Menu Manager Setup Guide

ONLINE ORDERING

1. Log in to [Shift4 Customer Hub](#).
2. Once logged in, click **Marketplace** in the lower-left-hand corner.
3. Scroll down to Online Ordering, then click **View Details** → **Install** and follow the prompts.
4. Once installed, Online Ordering will open with the **Restaurant Settings** tab selected. In this tab, make sure to fill in the following information:
 - a. **Restaurant Contact Information:** How you want your info to be displayed to customers.
 - b. **Credit Settings** → **Allow tips:** Whether or not we will ask your customers to specify a tip at checkout.
 - **Note:** There is no way to add a tip on a submitted order in the POS, so we recommend you select this option.
 - c. **Restaurant Image:** Upload an image for your restaurant. We recommend anything from a plate of food to a good photo of your interior.
5. Click **Save** to save your changes.
6. In the **Takeout/Delivery** tab, choose the settings that best fit your business needs.
7. Click **Enable Takeout/Delivery**.

You have now set up Online Ordering. Next, set up your menu(s) via **Menu Manager** before testing the system.

MENU MANAGER SETUP

1. Log in to [Shift4 Customer Hub](#).
2. Click on **Marketplace** in the left-hand navigation menu.
3. Click on **Menu Manager**.

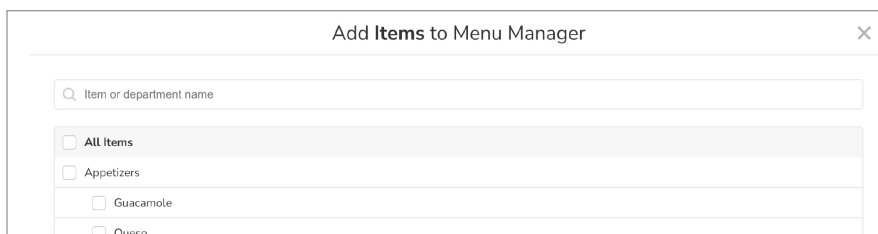
Importing Items From Your POS

1. In your Menu Manager, click the **Import from POS** button.

A screenshot of the Menu Manager interface. It shows a header bar with the text 'Menu Manager' on the left and two buttons on the right: 'Import from POS' (green) and 'Publish menu' (light blue).

Note: If the button is disabled, your Menu Manager has already been set up and has the latest information from your POS.

2. Use the checkboxes to add items or modifiers to your menu. While you can use the **All Items** checkbox to add items, it is recommended that you **select only those items you wish to sell online**, including customer favorites, items with high profit margins, or items which can be prepared quickly by your kitchen.

A screenshot of the 'Add Items to Menu Manager' dialog box. It has a search bar at the top labeled 'Item or department name'. Below the search bar are several checkboxes: 'All Items', 'Appetizers', 'Guacamole', and 'Onion'. The 'All Items' checkbox is currently selected.

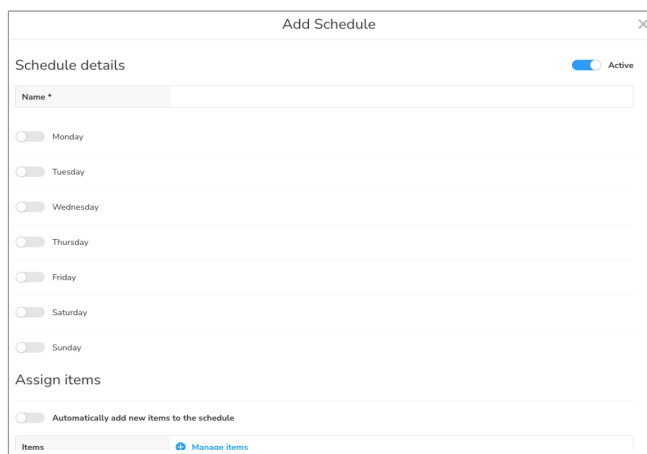
Note: If you added an item with modifiers, you will click **Next** to repeat the process with the modifiers.

3. Click **Save** when you are finished.

Creating a Schedule

Once you have imported your menu, you will need to create at least one schedule and add your items to it to show when your items are available online. Your store will not be ready to go until you set your schedule.

1. In your Menu Manager, click on the **Schedules** tab.
2. Click on the **Add Schedule** button.
3. Click on the **Active** toggle to make sure your schedule is active.
4. Enter a **Name** for your schedule.
5. Use the sliders to select the days your items will be available online. When a day is selected, you will need to set the times your item will be available in the **From** and **To** fields.
6. If desired, use the **Automatically add new items to the schedule** slider to make sure any new items you add to your menu are automatically included in the schedule.

A screenshot of the 'Add Schedule' dialog box. It has a title bar 'Add Schedule' with a close button. Below the title bar is a section 'Schedule details' with an 'Active' toggle switch. There is a 'Name' field with an asterisk. Below the name field are seven days of the week, each with a slider: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Below the days is a section 'Assign items' with a slider for 'Automatically add new items to the schedule'. At the bottom, there is an 'Items' field and a 'Manage Items' button.

7. Click on the **Manage Items** button to add items to your schedule.
8. Use the checkboxes next to your items (or the **All Items** checkbox at the top) to select items for your menu.
9. Click **Save** to finish adding your items.
10. When you are satisfied with your schedule, click on the **Add** button to finish creating your schedule.
11. Publish your menu.

Congratulations! Your store is now ready to start selling items!

Menu Manager has many other features to help you customize your store to meet your needs. In the next section, we will cover a few of those features to help you get the most out of your store.

MENU MANAGER CUSTOMIZATION

Once your menu is set up, you are able to customize by adding multiple schedules, designate special items for a weekend brunch, set up limited availability for certain items, and more.

Important: After completing any of the steps, be sure to click on **Publish Menu** to make your changes live in your store.

Setting Up an Online Price

- 1. On the **Menu** tab, expand a department and click on an item to set the online price.
- 2. Below the **Store Availability** section, set a value in the **Online Price** field.
Note: If you want to set special pricing for integrations (such as Uber Eats), you can use the fields in this section to change those prices as well.
- 3. Click **Save** when you are finished.

Adding an Image to an Item

- 1. On the **Menu** tab, expand a department and click on an item to add an image.
- 2. Scroll down to the bottom and click on the **Upload Photo** button.
- 3. Once you have located the image you want to use, click **Open**.
- 4. Crop and adjust the image as needed, then click **Done**.
- 5. Click **Save** when you are finished.

Changing Store Availability

- 1. On the **Menu** tab, expand a department and click on an item to set availability.
- 2. In the **Store Availability** section, select the store or stores in which you want to offer your item using the checkboxes.
- 3. Click **Save** when you are finished.

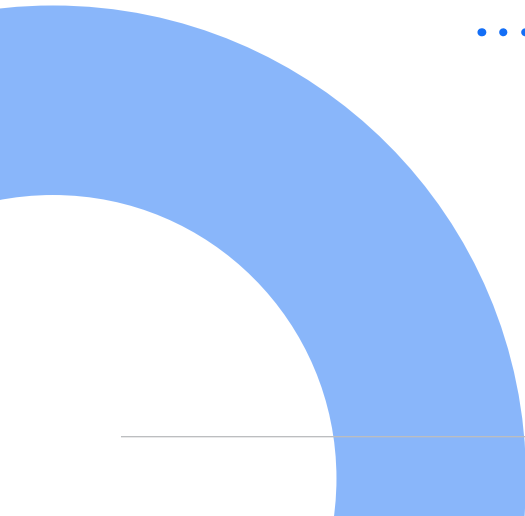
Item Labeling

- 1. On the **Menu** tab, expand a department and click on an item to label.
- 2. Below the **Pricing** section, use the provided fields to set labels for your item. These labels can help your customers know about important things, such as "Gluten Free."
- 3. Click **Save** when you are finished.



Your store is looking good!

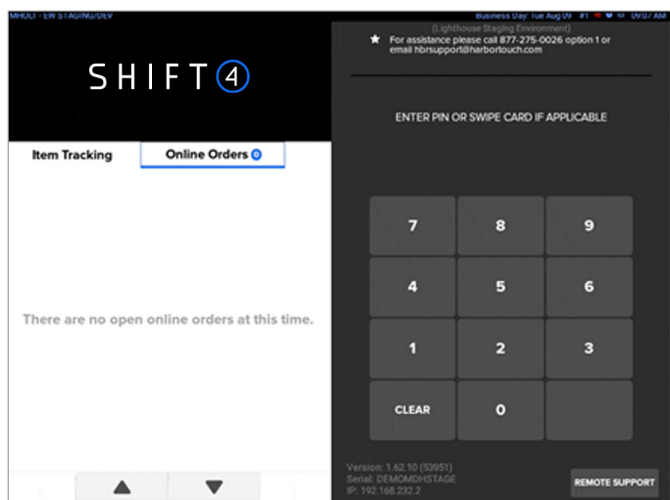
Many of the other customizations you can make follow similar procedures to the ones listed above.
Keep your eyes open for new and exciting features added your Menu Manager!



TESTING

After setting up Online Ordering and Menu Manager, we recommend taking a moment to run a few test orders to make sure everything is set up correctly.

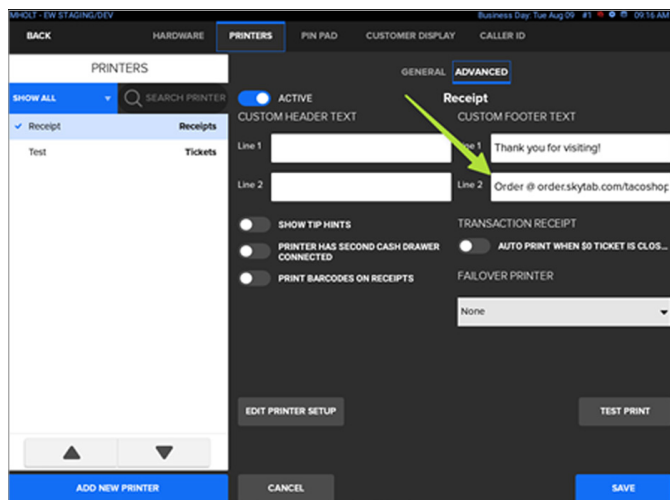
1. Go to the **Online Ordering → Takeout/Delivery** tab.
2. Click on your Menu link (URL customers use to access your site).
3. Order a few items.
4. Click **Checkout**.
5. Fill out the information requested
 - **Hint:** In Settings, at least for testing, enable CASH so you don't have to charge your credit card for orders.
6. Click through to submit your order.
7. On your POS, you will see a ticket for your order



PROMOTING ONLINE ORDERING

How you want to promote online ordering to your customers is up to you; however, here are a few suggestions to get you started:

- Add a link to Online Ordering to your website.
- Post a link to Online Ordering on social media.
- Add to your customer receipts.



How Sorting Works

- Online Ordering will honor the global sort order set up in your POS system for Items, Modifier Sets, and Modifiers.
- You can reorder Departments/Categories via **Menu Manager → Menu** by clicking the **Reorder Departments** button.

How POS Sync Works

Once you have imported/added items via Menu Manager, changes in your POS will automatically sync for those items.

What is automatically synced:

- Active/Inactive
- POS Name
- POS Price

Online Overrides

In Menu Manager, you can provide values for Online Name and Online Price (per integration). If you provide an Online Name and/or Online Price, those values will be kept, even if the POS value changes.

BULK ACTIONS

Menu Manager provides a quick way to make certain changes to one or many parts of your menu

1. Click the **Menu Manager → Menu** tab.
2. Within the filter bar, choose what you want to work on by selecting **Show → Choose Items or Modifiers** from the drop-down menu.
3. You will see checkboxes appear next to elements in the list below. You can check one or many list items that you want to perform an action against. Notice at the bottom of the screen that **Remove** and **Edit** buttons are now visible.
4. You can now perform any of these bulk actions against the list items you have selected.

This is a good way to remove many items from your menus, or batch add tags and labels.