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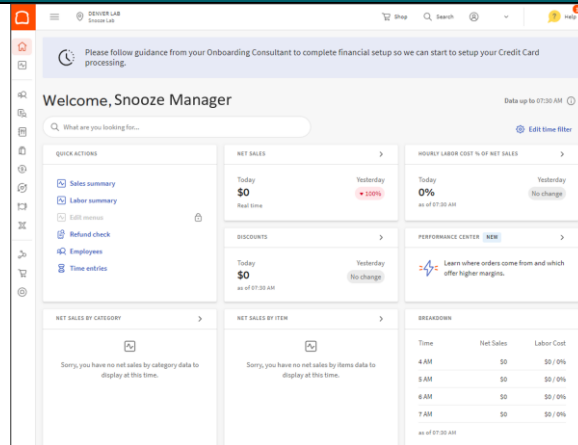
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Toast Tab Overview

ToastTab.com Web-Based Dashboard:

Log into ToastTab.com on your computer to complete the following tasks:

- Set Up New Snoozers
 - Create Supervisor Accounts
- Issue Refunds and Send Receipts from previous shifts back to handheld
- Validate Time Entries
- Run weekly reporting and dive deeper into metrics!



The screenshot shows a grid of menu items on the ToastTab.com dashboard:

- Analytics & Reports:** Includes links for Toast Reporting Essentials, Sales Summary, Locations, Sales, Menu, Labor, Accounting, Cash, Guests, Gift Cards, and Loyalty, and Kitchen.
- Labor:** Includes links for Jobs, Overtime Rules, Tip Withholding, Employees, and Scheduling.
- Kitchen / Dining Room:** Includes a link for Tables.
- Payments:** Includes a link for Customer Credits.
- Other Setup:** Includes links for Contact Settings and Test Alert Setup (marked as NEW).
- Connect & Learn:** Includes links for Referral Program (2,000), Toast Community, Toast Central, and Technical Documentation. There is a "Share your screen" option.
- Integrations:** Includes links for My Integrations and My Integrations Activity.
- Manager:** Includes links for Find Checks & Issue Refund, Issue Unlinked Refund, Send Notifications, and Toast Shop (marked as NEW).

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Adding/Archiving New Snoozers

BEFORE YOU BEGIN: Do NOT create a duplicate account for transferring Snoozer. Please submit a COL so that Snoozer Support and Securis/RTP teams can update the Snoozer's Toast account.

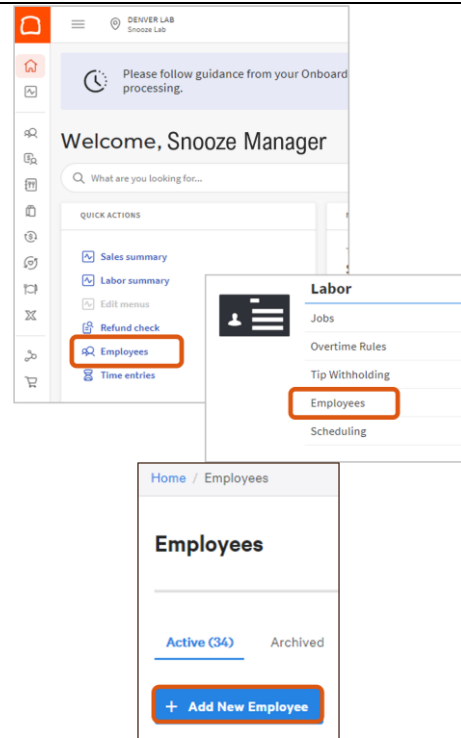
If creating an account for a NEW Snoozer, follow the instructions below.

1. From ToastTab dashboard, click Employees in Quick Actions or Labor section.
2. Click + Add New Employee (upper left).

NOTE: For Snoozers working in multiple locations, within your Region/State, please email your Regional Manager with Snoozer's first and last name and location(s) they need access to.

- This needs to be completed PRIOR to Snoozer working a shift at a secondary location.
- ONLY Regionals can remove access once it is no longer needed.

Regional Managers: See step 7 below for instructions to edit Snoozer's account. If you need to edit access outside of Snoozer's home state, please request through Help@SecurisSystems.com (Always include First & Last name in addition to home restaurant.)



3. Fill in Snoozer information under Add new employee (right column):

- Invite to Create Account: NO
- Legal First Name
- Legal Last Name
- Chosen Name, not nickname ex: Jonathan > Jon
- Phone Number: DO NOT ENTER
- Email Address: DO NOT ENTER
- POS access Code

Note: First and last name need to match what is on Snoozer government issued ID in order for payroll to process properly.

4. Add job code Meeting by selecting from dropdown.
5. Enter current Meeting Pay rate.

NOTE: DO NOT CREATE NEW JOB CODES or EDIT EXISTING JOB CODE PERMISSIONS

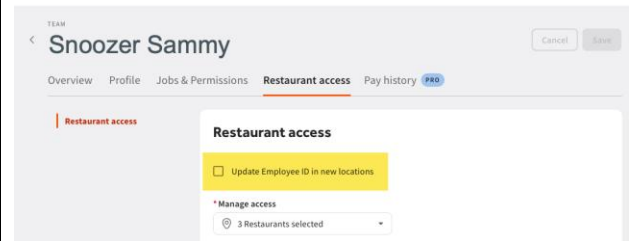
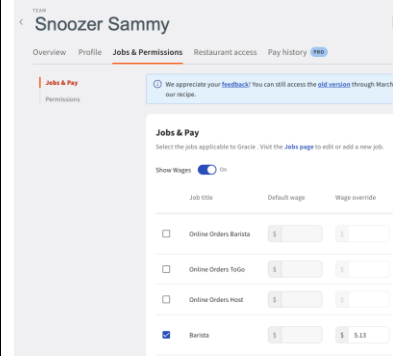
6. Enter Employee ID. Employee ID is Snoozer's Paylocity number. Leave blank until Paylocity account is created. Access Employee ID from Snoozer's profile on The Experience: [The Experience by Snooze Eatery \(wisetail.com\)](http://The Experience by Snooze Eatery (wisetail.com)).

1. NOTE: If this field is left blank when creating account it MUST be updated prior to processing payroll.

7. To Edit a Snoozer's account

1. Locate Snoozer's Profile
 - a) Pencil icon to the right of Snoozer name to edit profile.
 - Overview
 - View of Snoozer's account at a glance
 - Profile
 - Personal Information:
 - Legal first & last name ONLY
 - Chosen name is for preferred name, not nicknames
 - Jobs and Permissions
 - Add/Remove all applicable job codes to each Snoozer.
 - To schedule on-call shift, Snoozer will need to have on-call job code. DO NOT attach a pay-rate.

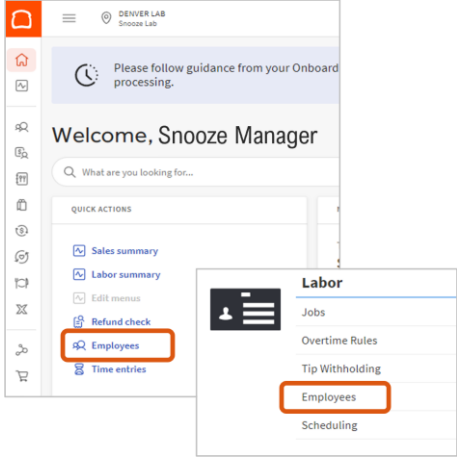
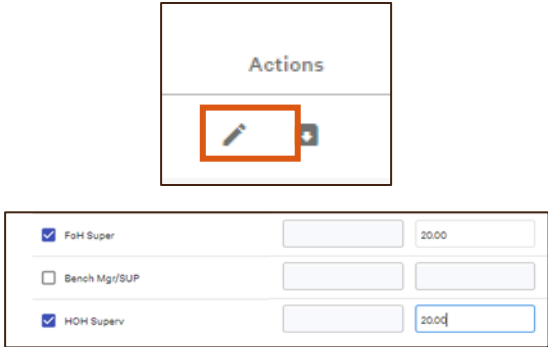
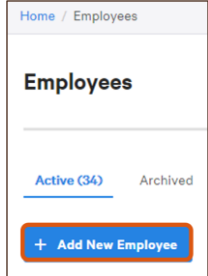
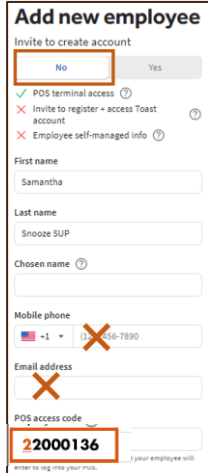
- Only ever select/toggle on a job code NEVER create a new one and/or edit existing job code permissions.
- Enter pay rate for each job code
- Note: ONLY add Three job codes to FOH Snoozers. Add regular job codes AFTER their training is complete.
- Restaurant Access – This is ONLY used by Regional Managers and is NOT used by Restaurant Managers. Regionals: Use the Restaurant Access tab to add/remove locations as needed. When adding a location, you MUST check the “Update external ID at locations” box BEFORE saving. Snoozer’s job code(s) and payrate(s) will also need to be updated at EACH location.
- For Snoozers working in multiple locations, within your Region/State, please email your Regional Manager with Snoozer’s first and last name and location(s) they need access to.
- This needs to be completed PRIOR to Snoozer working a shift at a secondary location.
- ONLY Regionals can remove access once it is no longer needed.
- Regional Managers can request access outside of their home state through Help@SecurisSystems.com (Always include First & Last name in addition to home restaurant.)
- b) Down arrow icon Archive: Snoozers after you have completed a COL- double check you are archiving the right Snoozer; this will delete their Axial account and remove any scheduled shifts! (yes, we did learn that the hard way!)
- c) Three dots will not be used by Managers.



REMINDER:

- DO NOT enter Phone Number or Emails
- DO NOT create job codes
- DO NOT alter Restaurant Access
 - Have a Snoozer who is helping out at another location? Email your RM for access!
- ONLY archive termed Snoozers (If you don't recognize a name- reach out, they are likely a Mothershipper who needs access)

Adding Supervisors

<p>1. From ToastTab dashboard, click Employees in Quick Actions or Labor section.</p>	
<p>2. Edit Snoozer's <u>current</u> Toast Information 3. Add job code HOH Superv or FoH Super 4. Enter pay rate 5. Hit Save</p>	
<p>6. Click + Add New Employee (upper left)</p>	
<p>7. Create a NEW account for Supervisor:</p> <ul style="list-style-type: none"> • Invite to Create Account: NO • Legal First Name • Legal Last Name + SUP • Chosen Name, not nickname (<i>only Managers and above are allowed a Snooze recognized nickname</i>) • Phone Number: LEAVE BLANK • Email Address: LEAVE BLANK • POS access Code: 2 + current Employee ID (<i>Samantha Snoozer's Employee ID is 2000136, their SUP POS access code will be 22000136</i>) 	

- Add job code Supervisor Card
- Set pay to \$0
- Enter their Employee ID as their Supervisor POS number. *(Remember: Samantha Snoozer's SUP POS access code was 22000136 so their Employee ID would be 22000136)*
- Click Add
- Register Mag card for Supervisor. **See Assign Swipe (Mag) Card to Manager section.**

Jobs and pay

Jobs

Supervisor Card

Pay

\$ 0.00

Edit job Remove job

+ Add new job

Employee ID ?

22000136

For employee safety, do not use numbers that relate to personal data, like Date of Birth or Government IDs.

Cancel Add another **Add**

8. Register Mag Card on handheld
9. Under account profile, select Disable POS Access Code

NOTE:

- Supervisors will need to clock in FIRST under their original POS code under FOH Super or HOH Superv (this job code will alert Payroll they need to get paid their Supervisor wage.)
- They will immediately clock in again under their SUP Card to get their managerial permissions.
 - All Managers & Supervisor POS Access codes must be registered to a swipe card.

Account Info

This is how the employee will be able to access Toast and how to

Allow POS access code login?

Enable POS access code login at this location

Disable POS access code login at this location

POS access code login may only be disabled when a swipe card is configured

Adding Managers (Tech: Above Restaurant Only)

STOP! Onboarding a new Manager or promoting an hourly? Complete the COL and Securis/RTP will complete.

FOR Securis/RTP & Snoozer Support ONLY:

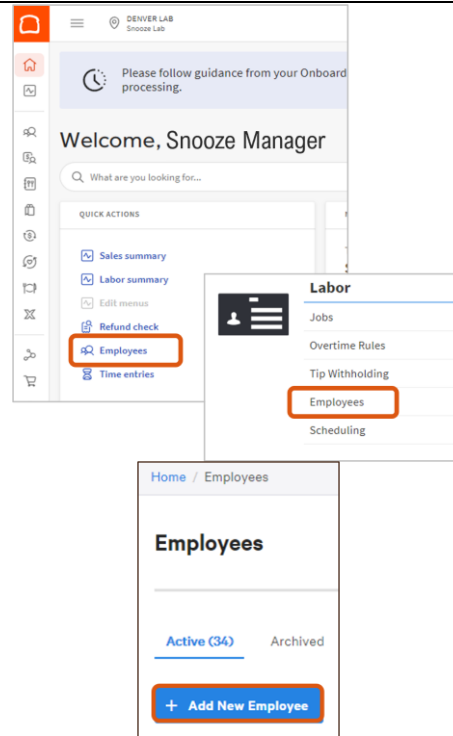
When creating an account for a NEW Snoozer, follow the instructions below. (Instructions for an internal promote can be found on the following page.)

1. From ToastTab dashboard, click Employees in Quick Actions or Labor section.
2. Click + Add New Employee (upper left)

NOTE: For Snooze Managers working in multiple locations within Region/State, RMs will update in ToastTab. (Review step 7 from above for instructions)

Securis/RTP will add access for locations in additional Regions/States.

Complete this PRIOR to Snooze Manager working a shift at secondary location.



3. Complete the required information under Add new employee (right column):

- Invite to Create Account: YES
- Legal First Name
- Legal Last Name
- Email Address: Enter Snooze Email

NOTES:

- Their legal name needs to match what is on their government issued ID in order for payroll to process properly.
- A POS code will be created when Manager activates account via email.

Add new employee

Invite to create account

No
Yes

- ✓ POS terminal access ?
- ✓ Invite to register + access Toast account ?
- ✓ Employee self-managed info ?

First name

Last name

Email address

4. Add applicable Jobs by selecting from dropdown.
 5. Leave Pay at \$0
 6. Click Add
- NOTE: DO NOT EDIT or CREATE NEW JOB CODES.

7. Edit Manger Profile
8. Navigate to Profile
9. Enter Payroll ID under Employee ID

For Internal Promotions:

1. Add Snooze email to email field
2. Update Jobs and Permissions by adding New Role and REMOVING hourly roles. (If applicable, archive the Supervisor Card account.)
3. Email Manager via Snooze email informing them that their Toast account has been created.
 - To access, MIT will need to visit ToastTab.com, enter Snooze email and select the "Forgot Password" link to activate Manager account.

Toast Handheld Mode Screen Overview

Handheld Mode Screen Manager Functions:

<p>The mode screen allows Managers to:</p>		<p>Create a quick-order / 86 ingredients.</p>
<p>Access the table map and active tables</p>	<p>Table Service</p>	<p>Access closed checks</p>
<p>Review Snoozer's shifts</p>	<p>Review Employee Shifts</p>	<p>Used to review Snoozer time entries</p>
<p>Used to perform EOD tasks</p>	<p>Close Out Day</p>	<p>Issue Refunds/Reprint Checks (past and present)</p>
<p>Register Manager Swipe Cards</p>	<p>Register Swipe Card</p>	
<p>Manage Cash drawers</p>	<p>Cash Drawers</p>	
<p>View Sales</p>	<p>Sales Reports</p>	<p>Manage Labor and Break Adherence</p>

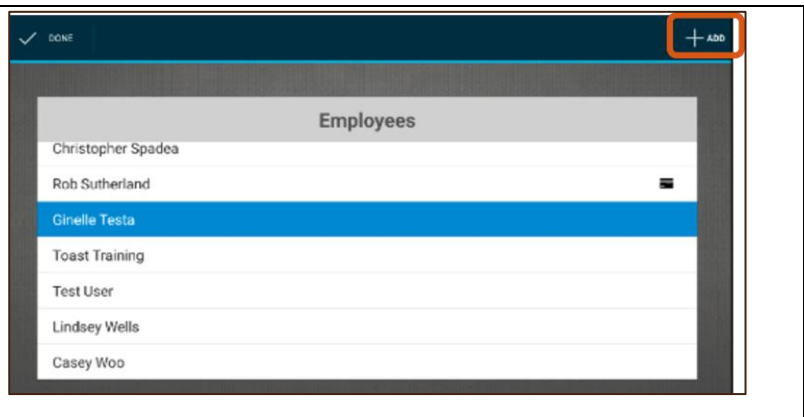
Assign Swipe (Mag) Card to Manager

Managers need to activate their account via email BEFORE assigning a swipe card:

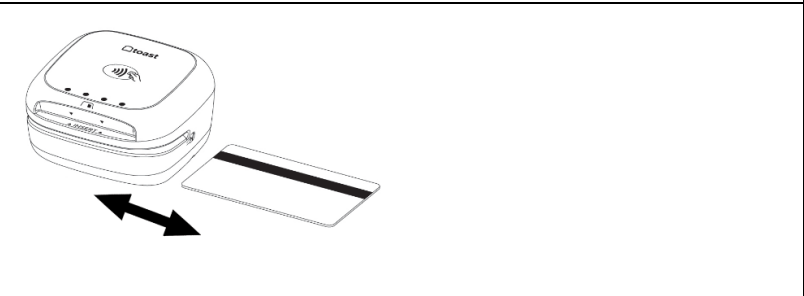
- From Mode Screen, scroll to Manager Activities section and select Register Swipe Card.

Manager Activities			
Shift Review	Time Cards	Close Out Day	Cash Management
Pay Out	Find Checks	Transfer Gift Card	Register Swipe Card

2. Locate and select the manager and select + Add (upper right).
 NOTE: Please swipe card now pop-up MUST be visible on device when swiping to register the card.



3. Swipe the card through the credit card reader attached to Toast handheld. Select Done when prompted.
 Note: DO NOT use Snooze Gift cards as Manager swipe cards! Any other card with a magnetic stripe can be used (school IDs, gym membership cards, etc.)

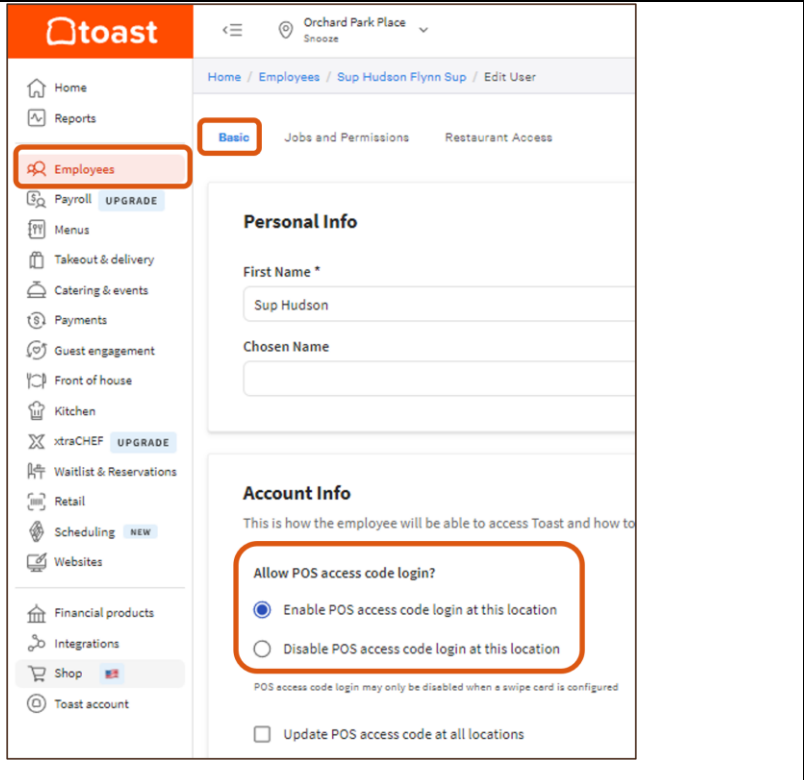


4. To REVOKE or assign a NEW swipe card, click the credit card icon to the right of the manager's name.
 Note: A single swipe card cannot be assigned to more than one manager.



5. Login to ToastTab.com and disable POS Access code login at this location for Managers and Supervisors (as needed).
 REMINDER: Supervisors will need to clock in twice.

- Their Supervisor POS Access Code is used to track hours for payroll.
- Their Supervisor Card is used to give them Managerial access and should be used for clocking Snoozers in/out & discounts.
 - DO NOT take orders under the Supervisor Card.



Cash Drawers

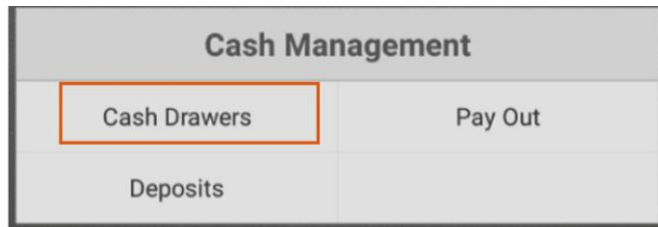
A cash drawer can either be Active or Closed. (Drawer is used by Baristas/ Managers ONLY)

- Active: The cash drawer is in use and taking cash payments. Baristas need to close out all cash payments to the drawer. Baristas will keep their tips separate from the cash in the drawer.
 - *Drawer automatically activates DO NOT select "new drawer" button– just place cash fill in drawer.*
- Closed: The cash drawer is not taking cash payments or other cash transactions. The bills have been counted and the actual closing balance has been entered into the POS.

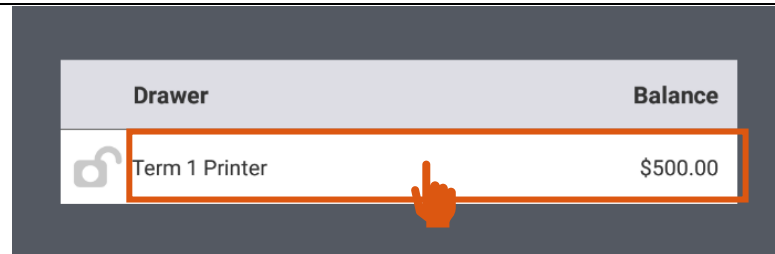
To Physically Open Drawer:

- Making change
- Counting drawer

1. MANAGERS: Under the **Cash Management** of the Manager Mode screen, select Cash Drawers.



2. Select Drawer
 a. DO NOT select the lock, as this locks the drawer.



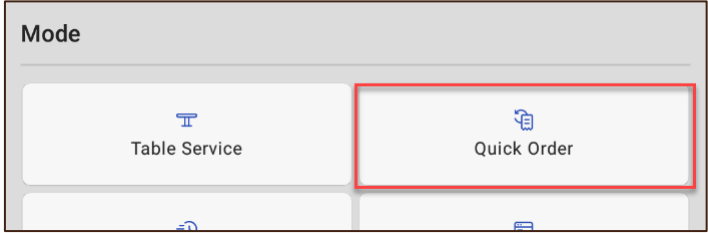
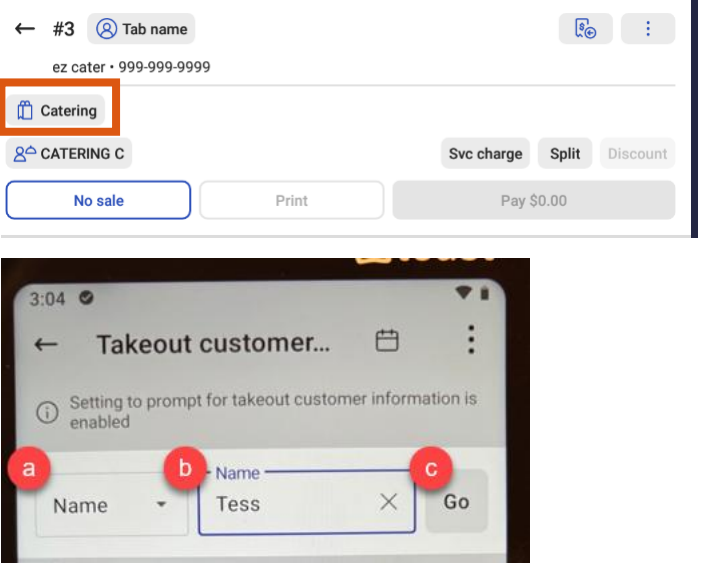
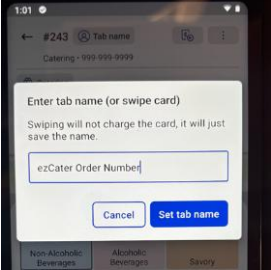
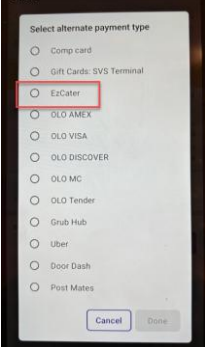
3. Hit No Sale

NOTE:

- Never use Cash In, Cash Out, or Cash Drop
- Reference out-of-pocket expenses in [Expense Reporting: Chrome River Quick-Start Module](#).



Ringling in Catering Orders

<ol style="list-style-type: none"> 1. Catering orders <u>MUST</u> be <u>rang in and closed</u> on the POS when they are prepared. <ol style="list-style-type: none"> a. If this is missed, please reach out to OpsExcellence@SnoozeEatery.com, copying your RM, immediately. 2. Login to device using 8888 3. Start a New Order by selecting Quick Order 	
<ol style="list-style-type: none"> 4. Change the (default) dining option from Dine In to Catering. <ol style="list-style-type: none"> a. When prompted for phone number, select drop down and change to Name. b. Enter Guest's name c. Select Go d. Enter the rest of the Guest's contact information then select Done. (Enter 999-999-9999 for the phone number if you don't have the actual number.) 	
<ol style="list-style-type: none"> 5. Update the tab name to ezCater order number, if applicable. If order is not an ezCater order, update tab name to the Guest's name. 	
<ol style="list-style-type: none"> 6. Enter order, send, and collect payment. <ol style="list-style-type: none"> a. If processing an ezCater order, select Other from the payment screen and then select EzCater. b. Enter gratuity, if applicable. (Snoozer tip, not Driver) 	

Creating Catering Invoices

<p>1. Navigate to Payments, Payment Methods, Customer Invoices.</p>	
<p>2. Select Create Invoice on the top right corner of the screen.</p>	
<p>3. Under Find Customer, either search for a current Guest or select +Create Customer to enter information for a new Guest.</p>	
<p>4. Select the Catering Dining Option and input the pick-up date and time of Guest's order.</p>	

5. **Add item(s)** as ordered by the Guest.
 - a. Select **+Add Item**
 - b. Select **Catering & After Hours** Menu
 - c. Select options from Catering Menu
 - d. If applicable, select **Mark order as tax exempt**.
 - You'll then need to **+Add tax exemption ID**
 - e. Do NOT +Add service charge
 - f. Do NOT +Add discount

6. Once all items have been entered, configure the **Payment Schedule**.
 - a. Payment Due Date needs to be set for the day before the event. (Invoice must be paid before the Restaurant prepares the items.)
 - b. Do not +Add deposit request.

7. Complete Details field.
 - a. Set Server to **Catering Catering**
 - b. Toggle on
 - **Allow customers to add a tip**
 - **Allow customers to pay with credit card**
 - c. No need to update the memo
 - d. Do not add attachment

8. Once all fields are complete, select Review Invoice from the upper right corner of the screen.

9. Review and confirm accuracy of the invoice.
 - a. If changes need to be made, select **Edit**. from the upper right corner of the screen.
 - b. If the order is accurate, select **Send Invoice**.

From the Invoices page, you can see previous invoices in three different states.

1. **OPEN** – Invoice created and sent to Guest.
2. **DRAFT** – Invoice was drafted but has not been sent to Guest.
3. **PAID** – Order was paid for by Guest.
 - a. No further admin is needed once an order is marked as paid.

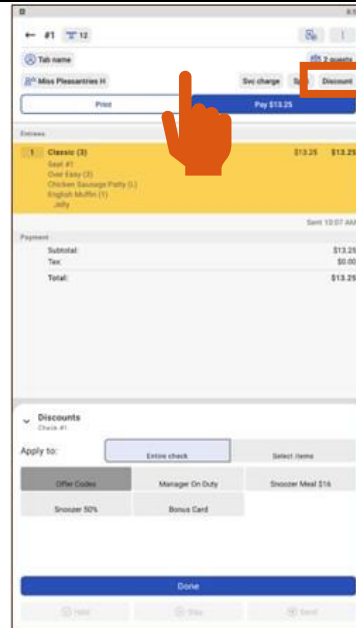
Amount	Status	Number	Customer	Company	Location name	Created date	Order date
\$48.00	OPEN	#000013	Abigail Hartley		DENVER LAB	May 27, 2025	5/30/2025, 1:36 PM
\$135.00	DRAFT	#000011	Abigail Taylor	Testing	DENVER LAB	May 16, 2025	5/17/2025, 12:00 AM
\$93.00	PAID	#000010	Abigail Taylor		DENVER LAB	May 16, 2025	5/16/2025, 1:05 PM

IMPORTANT: You MUST clock Catering (8888) in and complete a Shift Review on the date the order is prepared so that the transaction is properly accounted for.

Discounts & Offer Codes (Including Tax Exempt)

1. Tap the blank space of the order information screen to access the Discounts button.

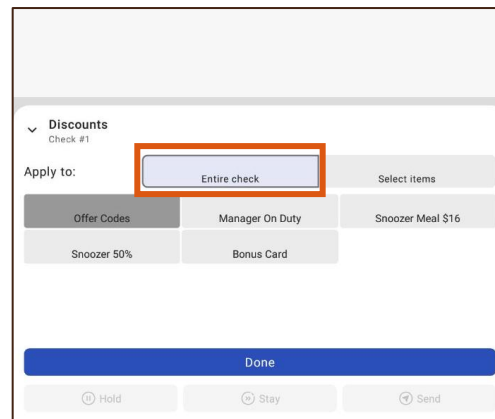
Note: Do Not select the item before selecting the discount button.



You'll then have the option to apply a discount to Entire Check or to Select Items.

For Entire Check:

- Offer Codes: Punchh/Guest Recovery codes. Any Snoozer can apply offer codes
- Manager on Duty: deducts \$25
- Snoozer Meal \$16: must be applied first, if check is greater than \$16.
- Snoozer 50% on Duty:
 - Applied for Servers and Baristas while working
 - Applied as a second discount for Support Roles if their order is greater than \$16
 - Alcohol SHOULD NOT be added to these checks



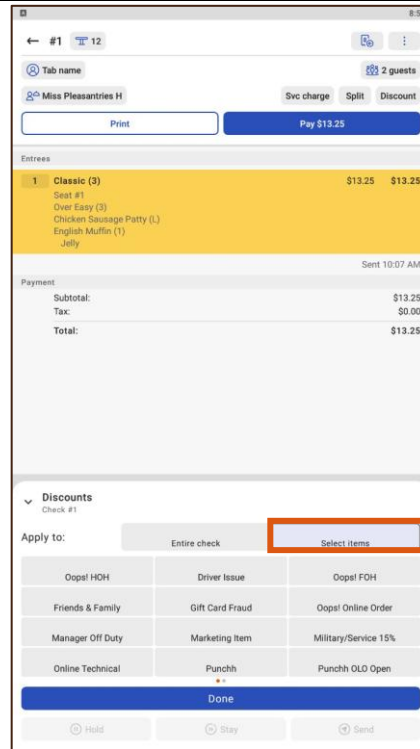
For Select Items:

- *Oops HOH:
 - Item Made Wrong
 - Under/Over Cooked
 - Foreign Object
 - Cold Food
 - Ticket Time

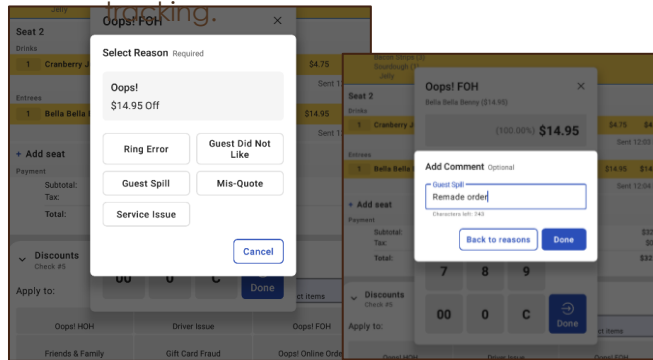
- *Oops FOH:
 - Ring Error
 - Guest Spill
 - Service Issue
 - Guest Did Not Like
 - Mis-quote

*When using the Oops discounts, the discount amount entered will apply to EACH item selected. For example, if you select two items and enter a \$5 discount, \$10 will be removed. (2 items x \$5 = \$10 discount)

- Friends & Family: Manager discretion to show a little love. NOT applied to every check!
- Gift Card Fraud
- Gift Card Balance Transfer
- Togo No-Show
- Manager Off Duty
- Marketing Item
- Military/Service 15%
- Online Technical
- Pancake Card
- Pickle (CK/FL)
- DO NOT USE
- RAFTTT
- Raver Appreciation
- Snoozer 100%
- Snoozer 50% Off Duty
- Transportation
- Walk Out
- Community (501c3)
- Loyalty Error

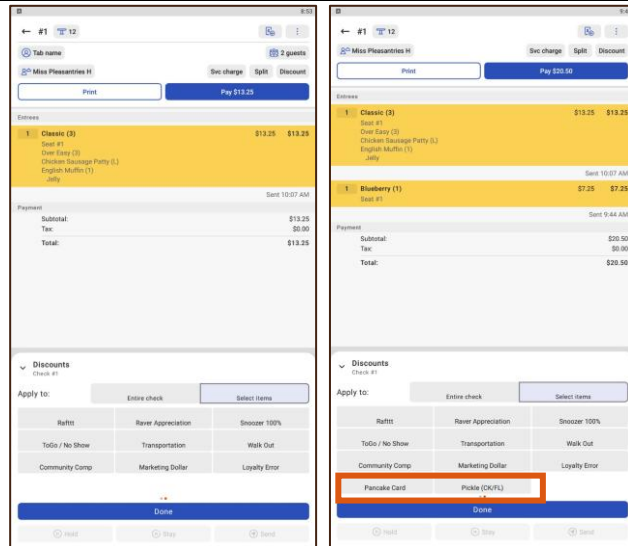


- Select Reason and add comment. These comments are not visible to Snoozer/ Guest and are used for root cause analysis and



Discount options only appear if check contains items that qualify for discount.

Image 1 differs from Image 2. The first check doesn't have a pancake, so the Pancake Card/ Pickle options aren't available.



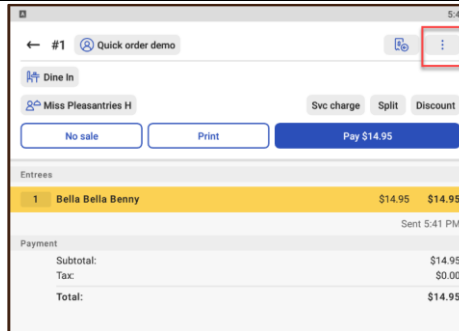
NOTE: Do NOT adjust olo checks on Toast.

1. Login to olo.com to access the order by: Order ID, time frame, or transaction date.
2. Select Refund Order option in the upper right corner of screen.
3. Select reason for refund in dropdown
4. Complete the Details for Guest section with a sincere and hospitable note as this will be visible by the Guest.

olo refunds to Snooze are processed on the backend and not through the POS.

Tax Exempt:

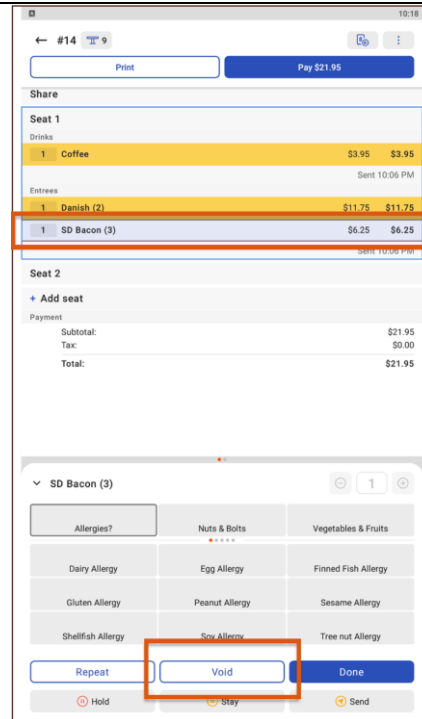
1. From the order screen, select the 3 dots to apply Tax Exempt
2. Select Tax Exempt from the list
3. Enter Guest's Tax Exempt number.



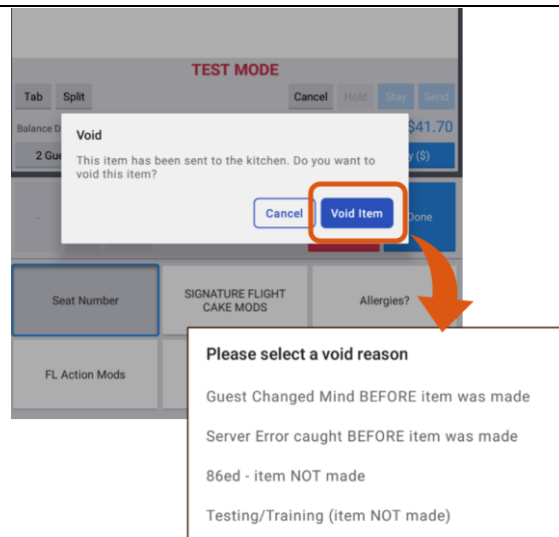
Void an Item

Void should only be used if the item has not been made.

1. Select item to void and tap Void.

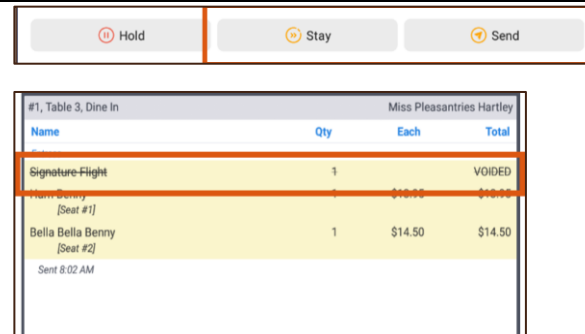


2. Confirm Void Item & select reason for Void.



3. Tap Stay or Send to confirm and delete from check. Voided item appears with strikethrough.

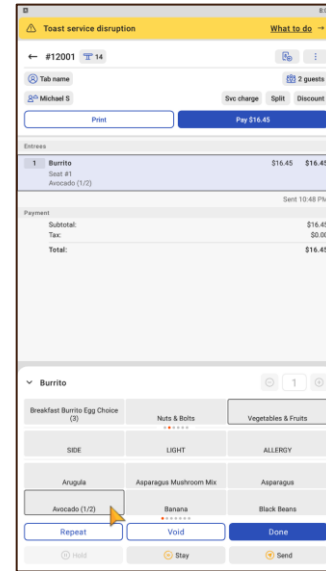
NOTE: Voids cannot be undone. If you void the wrong item, you will need to re-ring the item and then call to Expo so they can CANCEL the item from their screen, ensuring the item isn't remade.



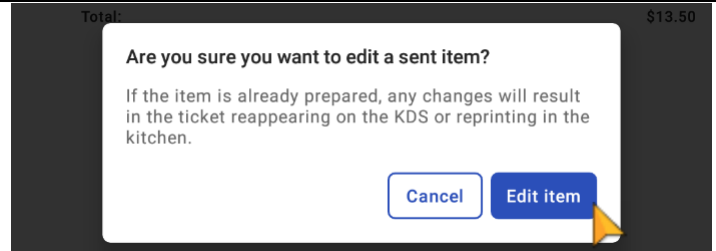
Void/Remove Enhancement

You can remove an enhancement if it was not included in the dish. (Ex. Avocados too brown to serve)

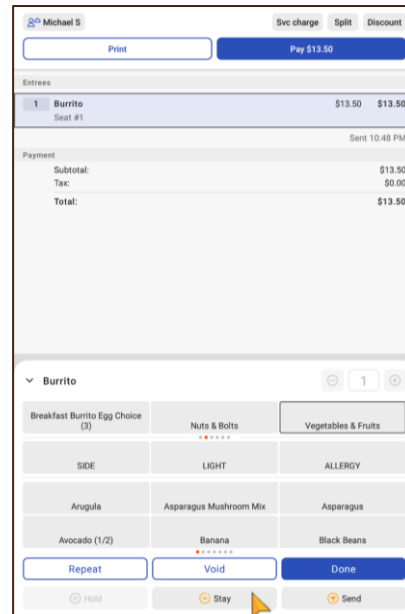
1. Select item that needs to be modified
2. Navigate to the Modifier Group that the Modifier is located in. (For this example, we access the avocado from the Vegetables & Fruits Mod Group.)
3. Deselect the modifier



4. You'll receive a notification informing you that you're editing an item that has already been sent to the kitchen. Select Edit Item.



5. Select Stay or Send so that the edit remains on the check.
 - a. If this order is still on the KDS screen, the voided item will be highlighted in red and crossed out so that the Cooks know not to include the ingredient(s).

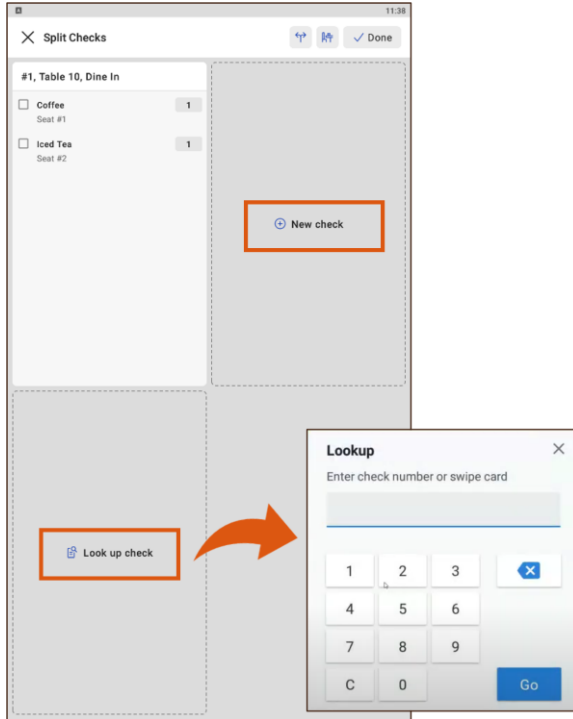
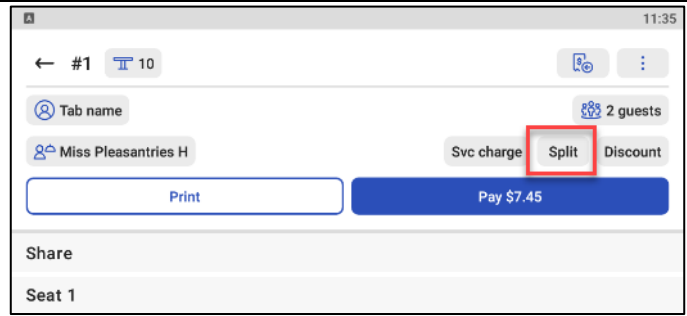


Move Item from One Check to Another (Including Existing Tables)

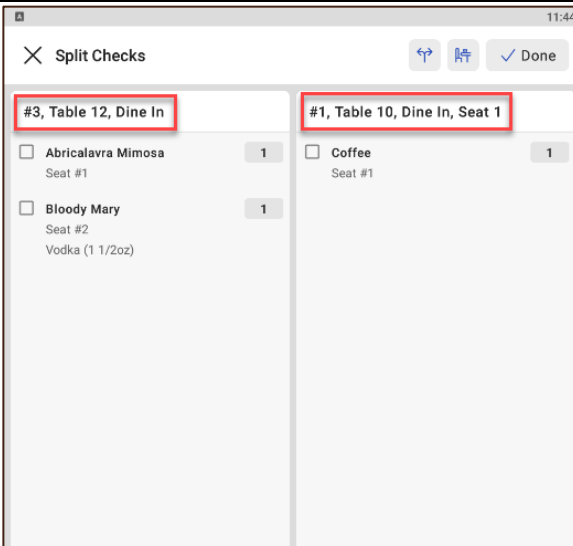
NOTE: Though the platform allows any Snoozer to do this, ONLY MANAGERS should be moving items from one check to another.

To split checks or move an item from one check to another:

1. Click Split.
2. Select:
 - New Check: if you're creating a new check for the item
 - Lookup Check: if you're adding item to existing check (you may need to swipe if there are multiple checks at this table!)
3. Enter Check Number of correct table.
4. Click Go.



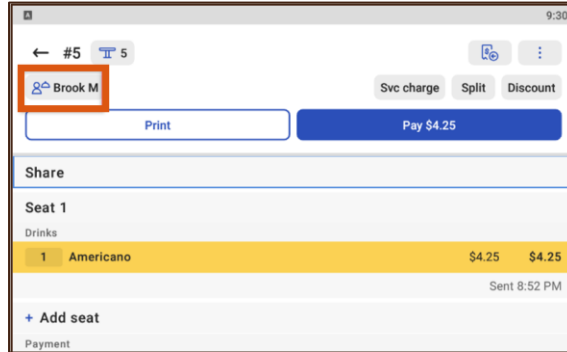
5. The check for the other table will now be available.
6. Select the item(s) and drop to the other check.
7. Select Done.



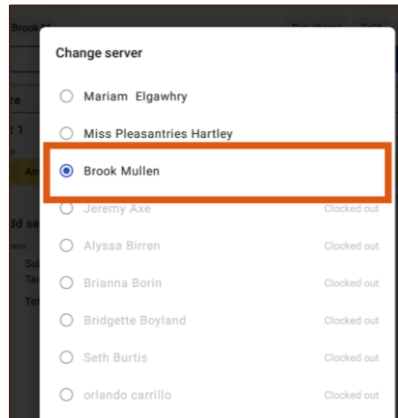
Transferring and Combining Tables

Only Managers can transfer tables between Servers:

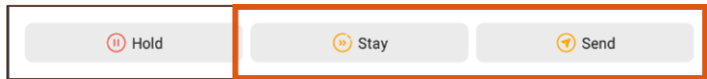
1. Pull up the table you wish to transfer and select the Server's name.



2. Select Server or Barista to receive the table.

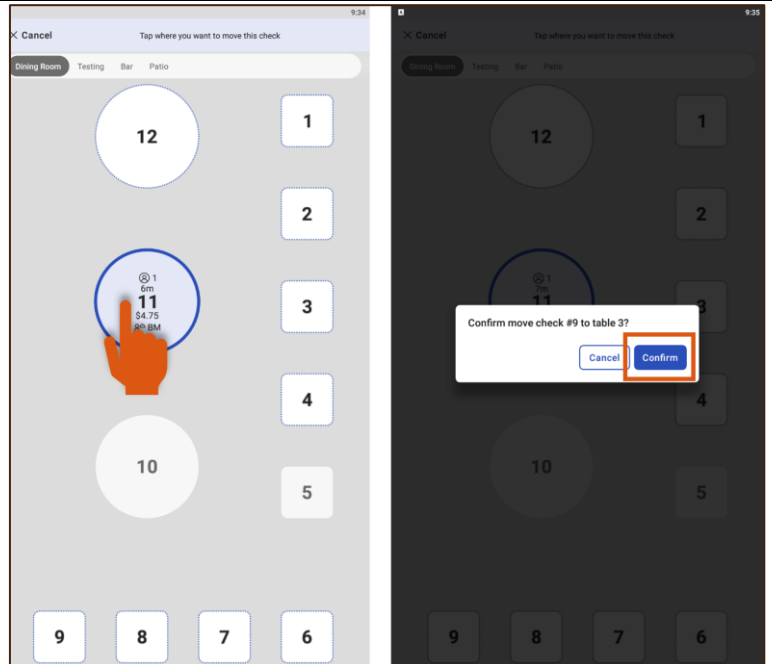


3. Select Stay or Send to complete the transfer.



To combine multiple tables into one, or move a table:

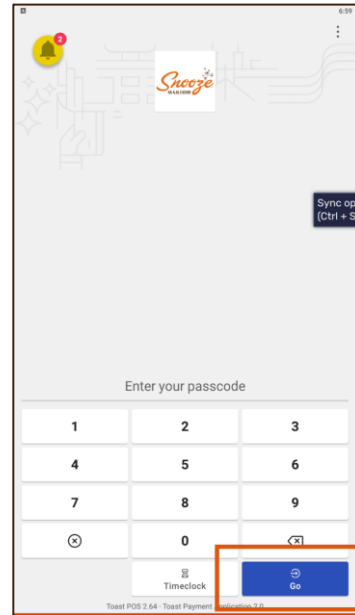
1. Long press the table you want to move.
2. Tap the table you want to move it to / combine it with.
3. Click Confirm.



Using Team Service for Large Parties/ Gratuity Share

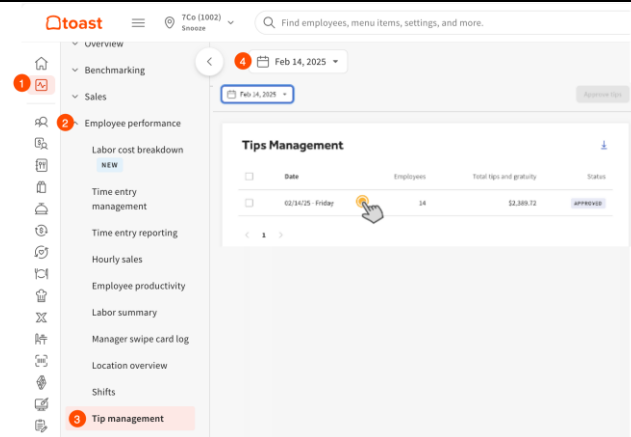
When hosting a large party that you want to split between two Servers, use the Team Share Toast account. Any sales made under this account will be processed through the tip pool and any remaining gratuity can be evenly split amongst the Snoozers that assisted with the party.

1. Clock in Team Service by using 2424
2. Order all items under 2424
3. Once the party pays, complete a shift review for Team Service and clock Team Service out.
4. You can clock Team Service in again and complete a secondary shift, if you have another large party in the same day!

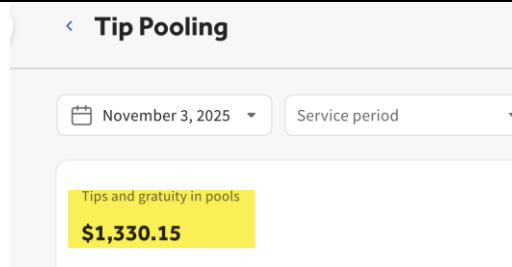


Direct Tipping Gratuity from Team Service

1. From ToastTab, navigate to Reports
2. Select Employee Performance
3. Select Tip Management
4. Select Today's date
5. Click into the day in which the Team Service occurred



6. Write down the amount listed in the Tips and gratuity in pools



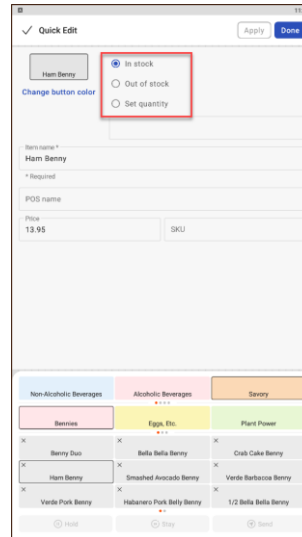
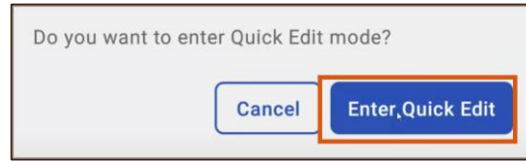
<p>7. Locate the Team Service Share “employee” in the Tips by Employee section</p>	
<p>8. To distribute the gratuities earned from the Team Service, click directly into Team Service Share “employee”</p>	
<p>7. Scroll down to the Tips and Gratuities Earned from Pooling section</p> <p>a. Subtract the Non-cash tips earned by entering the balance as a negative number in the Additional tips (non-cash) earned field</p> <p>b. Select Save and close.</p>	
<p>8. You will then need to allocate that balance to the Hourly Snoozer(s) that assisted with the Team Service order by clicking into their name and adding their portion to the Additional tips (non-cash) earned field. (Note this number should be a positive number as you are ADDING the amount to the Snoozer's earned gratuities.)</p> <p>9. Select Save and Close.</p> <p>10. Repeat step 8 until all Team Share gratuities have been distributed.</p>	
<p>11. Verify the ending amount of Tips and gratuity in pools matches the starting amount.</p> <p>12. Pull a Tip Management report to verify Team Service Share hasn't retain Tips</p>	

86'ing via Quick Order

1. From the Handheld, go to **Order Screen via Quick Order**
2. Locate Item/Modifier
3. Long press the Item/Modifier button
 - NOTE: You must select the individual item, not the category. Ex: Ham Benny not Bennies. Plain (1) not Plain Pancakes.
4. Select Enter Quick Edit, toggle:
 - Out of stock
 - Set quantity
5. Select Apply
6. Then select Done

This will automatically update the status in olo and our 3rd-Party DSP menus!

[Click Here to access olo User's Guide](#)



On Order Screen, an 86'd item will reflect a "0" in the top right corner and cannot be selected. If a quantity was entered, the visible number will deplete as remaining items are sold.

To add the item back, repeat steps and change Inventory back to In Stock.

You can also un-86 items in the *optional* Toast Now app.

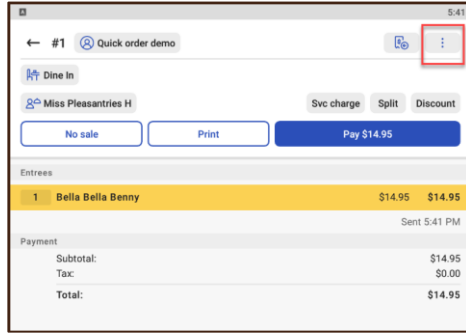
Items cannot be 86'd from the app.



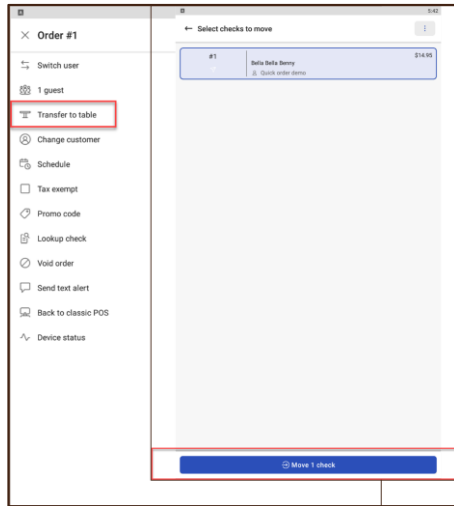
Track inventory changes: www.toasttab.com → Reports → Menus → 86 Report

Assigning a Quick Order to a New Table

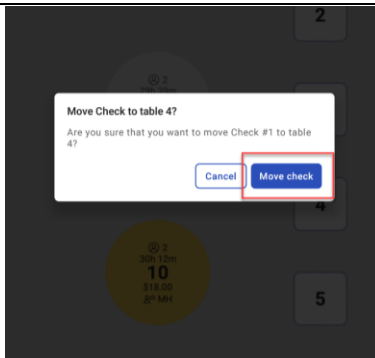
1. Open quick order check and select Update.
2. Select the three dots in upper right corner.



3. Select Transfer to table.
4. Select the check(s) you want to transfer and click Move 1 Check.



5. Select the table you want to move the check to and click Move check.



Moving Payments

1. Under YOUR number, locate the table you're moving the payment to and write down Check #
2. Under closed checks, open the check with the payment that you need to move
3. Write down tip %
4. Click Pay
5. Write total amount paid from this check
6. The payment should be highlighted, select Adjust
7. Select Move Payment to a Different Check
8. Click Done
9. Enter the check # that you wrote down and select Go.
10. When prompted, select the option to go to the check #
11. Note the amount on the Pay button:
 - a) If payment is GREATER than the new balance (neg number)
 - a) Highlight the payment and select "adjust"
 - b) Select "adjust to ___(balance)"
 - c) Select the tip amount and adjust to tip % (You'll need to multiply the new balance by previous tip % to configure the new tip amount)
 - d) Select Update > Select Close Check
 - b) If original payment is LESS than the new balance, Snoozer forfeits all/portion of tip which will be paid to the balance due.
 - a) Highlight the payment and select "adjust"
 - b) Select "adjust total amount"
 - c) Select the tip amount and adjust
 - a) Lower amount to satisfy balance due and apply the amount to balance.
 - b) Zero-out the tip and apply its entirety to the balance due.
 - d) Select Update.
 - e) If a balance is still due, discount the remaining balance to Oops FOH > Service Issue > Type Payment, when prompted to Add Comment (See [Discounts](#) for Oops specifics)
- To determine the pre-tax discount amount:
 - a) Take the remaining total and divide it by (1+ decimal tax rate)
For example, if your tax rate is 8%, the decimal rate is .08. You would divide the remaining balance by 1.08.
 - b) This new balance is the pre-tax balance that needs to be discounted to achieve a zero-balance check.

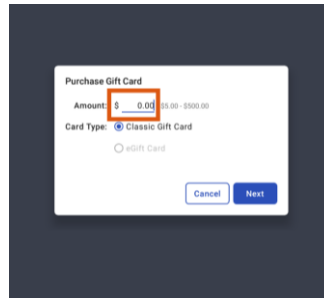
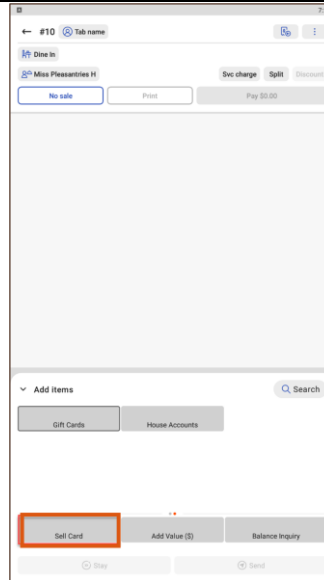
Tax rate is: _____

Processing Gift Cards, Guest Recovery Comp Cards, Community Donation Comp Cards, & Bonus Comp Cards

To sell a new Gift Card or activate a Guest Recovery Comp Card/Community Donation Comp Card:

Note: Gift Cards are activated once payment has been processed!

1. Start with a new Gift Card/ "On Us" Card.
 - a) Gift Cards can be sold to Guests
 - b) On Us cards are for Guest Recovery / Donations ONLY – these cards cannot be sold.
2. From the order screen, select the Gift Cards menu.
3. Select Sell Card.
4. Enter dollar amount
 - a) As requested by Guest purchasing
 - b) As determined by L.A.T.T.E guidelines for Guest Recovery.
 - c) As determined by Community Budget for Community Donation.
5. Swipe the new gift card with magnetic strip facing up.
 - a) If Gift Card is being purchased, continue to the payment screen.
 - b) If activating a Guest Recovery Comp Card, discount to appropriate Guest Recovery discount button.
 - c) If activating a Community Donation Comp Card, discount to Community 501c3* or Marketing Dollar.

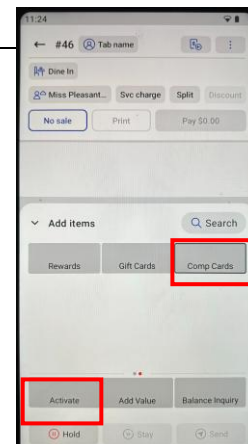


*Only donations being provided to a certified 501c3 based organization should be discounted with the 501c3 button. All other donations should be discounted to Marketing Dollar.

To activate a Bonus Comp Card:

1. Follow steps above to Sell necessary Gift Card purchases required to receive the bonus
2. From the menu screen, select Comp Cards
3. Select Activate
4. Swipe the *Bonus Card(s). The bonus amount will be applied to each bonus card swiped.
5. Select Okay

*Only designated bonus cards can be activated during the specific earning period. (Bonus cards from previous season,



Guest Recovery, and Community Donation cards cannot be activated.)

To redeem a Gift Card, Guest Recovery Card, Community Donation Card, or Bonus Comp Card:

1. On the payment screen, select Gift Card.
2. Enter Gift Card Number by swiping with magnetic strip facing up.
 - If the card balance is greater than balance due, give handheld back to Guest to complete transaction. Engage in meaningful, polite, and genuine conversation during this process. Pro Tip: This is also a great time to pre-bus/manicure the table.

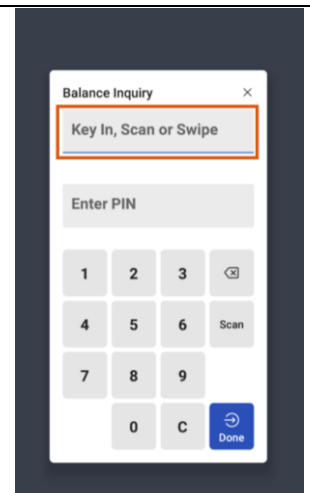
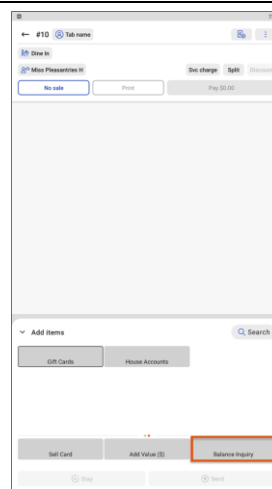
If card balance is less than balance due, process gift card for amount available, and Confirm partial payment. Here you will see the Payment amount and the Gift Card Balance. Select Continue and confirm Guest's Gift Card Receipt preference. Select Pay Remaining Balance to go back to payment screen and complete transaction with additional type of payment.

To check Gift Card balance

1. From the order screen, click Gift Card.
2. Select Balance Inquiry.
3. Swipe gift card with magnetic strip facing up. Balance inquiry results will pop up on screen.
4. Select Okay to close.

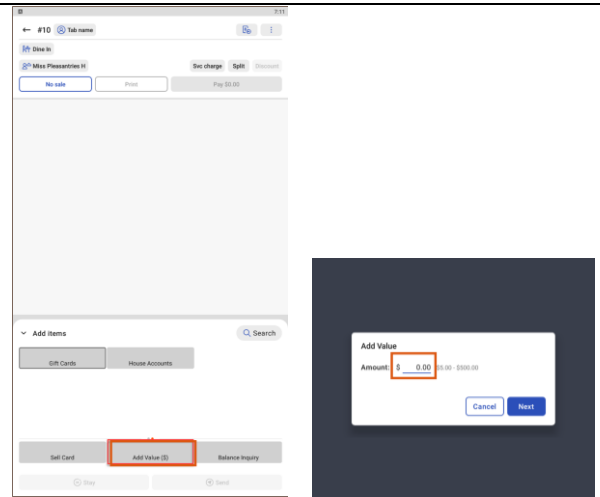
Note: Gift cards starting with 16883xxxx, 36098xxxx, and 34175xxxx need to be manually entered and the pin is the last 4 digits of the card number.

If a Guest attempts to redeem a gift card and Toast replies with an error message, a Manager should first verify the GC balance then follow one of the processes outlined on the [Gift Cards in Toast](#) one-sheeter to rectify the situation.



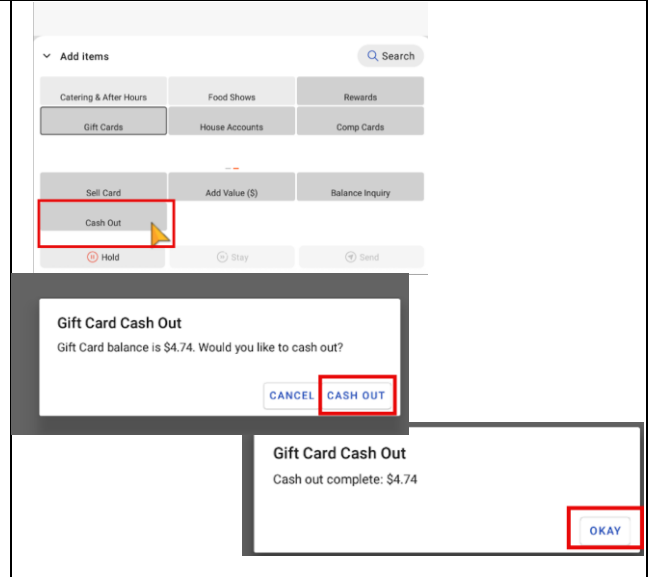
To add value to existing gift card:

1. From the order screen, click Gift Card.
2. Select Add Value (\$) and enter dollar amount requested by Guest.
3. Select Next.
4. Swipe Guest's existing gift card with magnetic strip facing up. Continue to the payment screen.



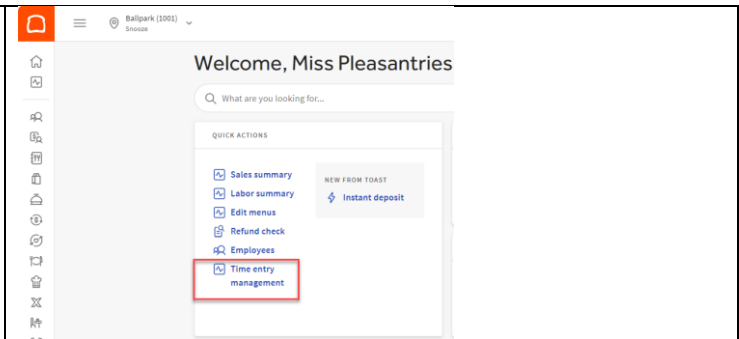
To cash out a gift card balance, where applicable:

1. FROM THE BARISTA TERMINAL ONLY log in to Toast using your Manager mag card.
2. From the order screen, select Gift Card menu.
3. Select Cash Out.
4. Swipe Guest's gift card and select Done.
5. Pop-up will display gift card balance. If eligible for cash out redemption, select CASH OUT.
6. Pop-up will display cash out confirmation, select Okay.

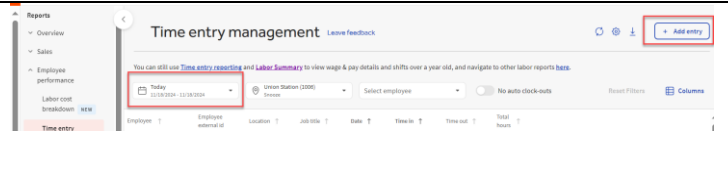


Opening Procedures

1. Navigate to Toast Tab (web version) Home screen
2. Click Time Entry Management
 - a. Toggle filter to Yesterday
 - b. Review all Snoozer entries for proper job codes and in/out times.
 - i. If a Tipped Snoozer was in FULL job code all day, review Step for identifying first order, Step 3 below, and adjust time as needed.
 - c. Log any edits on the Time Entry Edits Tracking sheet
 - d. Ensure there is a time entry for Online Orders.

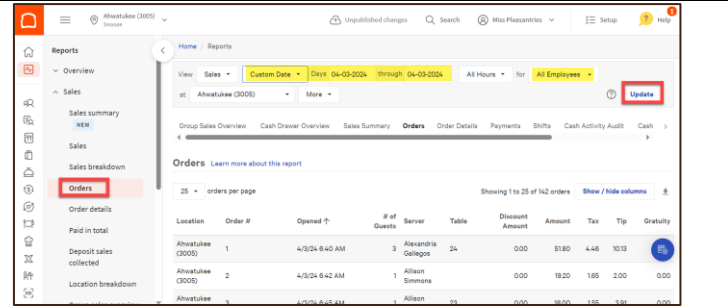


- i. Online Orders will need to be clocked in for all operating hours.
*Multiple entries can be added if needed.



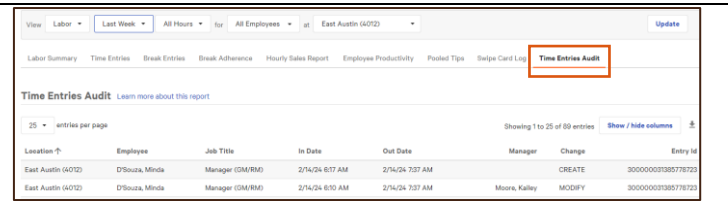
3. Steps for identifying first order
 - a. From Home page, select Sales
 - b. Select Orders
 - c. Filter to specific day
 - d. Select Snoozer's name from dropdown
 - e. Select Update

You'll now be able to identify when the Snoozer started tip producing work for the day and adjust their Position Full/ Position Tipped time accordingly.

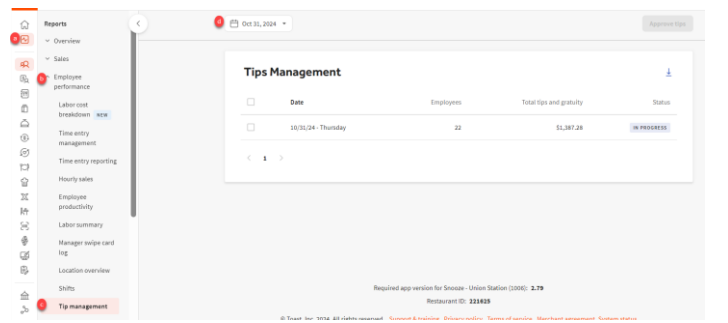


4. Review Time Entry Audits and ensure
 - a. All edits are logged on the Time Entry Edits Tracking Sheet
 - b. Managers have NOT adjusted their own entries without RM approval

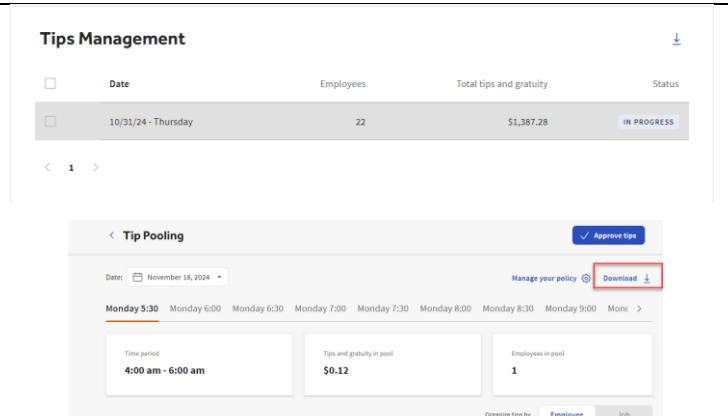
NOTE: Time Entries MUST be reviewed BEFORE approving tips for the day.



5. Review and Approve Tip Management for the previous day.
 - a. Navigate to Reports
 - b. Employee Performance
 - c. Tip Management
 - d. Select yesterday's date in the date filter.



6. Click into the individual day to download and review the report. See instructions for [downloading an excel file](#) for details downloading and filtering the report.



7. Once the file has been downloaded and filtered, confirm the Tips and gratuity after pooling for Online Orders, Catering, and Event = 0.
 - a. If Tips and Gratuity after pooling reflects \$0, no further additional action is needed for Online Orders.
 - b. If Tips and Gratuity after pooling shows a balance for:
 - Online Orders – return to time entry management and ensure Online Orders was clocked in for the entire shift.
 - i. If not, adjust the time entry and repull the report.
 - ii. If so, review FOH time entries to ensure the proper work group was clocked. If not, submit a PAF to Payroll so they can allocate the gratuity to the Snoozer(s).

F	G
Tips and gratuity before pooling	Tips and gratuity after pooling
4.42	✓
0.82	✓
5.02	✓
2.24	✓
6.75	✓

i.e. If neither a Host nor Barista was clocked in when a gratuity was earned, a PAF would need to be submitted to allocate the tips to another Snoozer.

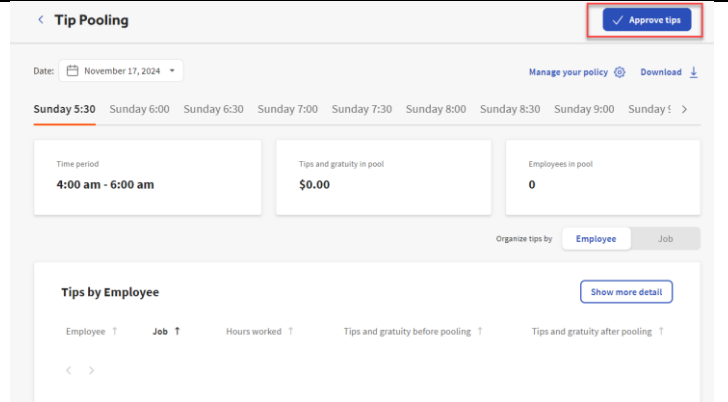
If additional troubleshooting support is needed, reach out to OpsExcellence@SnoozeEatery.com.

8. Review job codes to ensure only Hourly Snoozers that are eligible to earn tips are on the report.
 - a. If a Manager, Supervisor, or trainee are on the report, reach out to OpsExcellence@SnoozeEatery.com to resolve.

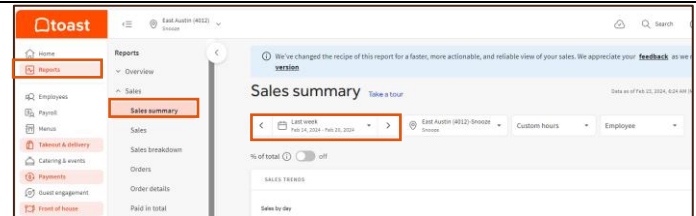


9. Approve Tips for previous day.

NOTE: Time Entries MUST be reviewed BEFORE approving tips for the day. If you need to make changes to time entries AFTER tips have been approved, you will need to unapprove tips, make the time entry edits, document edits on time Entry Edits Tracking sheet, then repeat steps 5 – 9 above to reapprove tips.



10. Review ToastTab.com Sales summary to ensure a deposit was entered for the previous day.
 - a. Open Reports
 - b. Click Sales Summary
 - c. Adjust the date filter to Previous Day



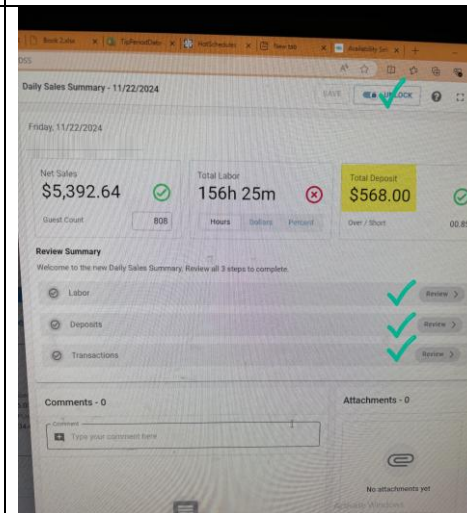
12. Scroll down to Cash Summary
13. Validate an amount has been entered into the Actual Deposit field and that it matches Total Cash (+/- change, unless otherwise explained)

NOTE: To add or edit a deposit view [Editing a Deposit](#)

Expected closeout cash	\$978.88
Actual closeout cash	\$978.88
Cash overage/shortage	\$0.00
Expected deposit	\$478.88
Actual deposit	\$479.00
Deposit overage/shortage	\$0.12

CASH ACTIVI... Cash activity au...	
Total cash payments	\$478.88
Cash adjustments	\$0.00
Cash refunds	\$0.00
Cash before tipouts	\$478.88
Tipouts tips withheld	\$0.00
Total cash	\$478.88

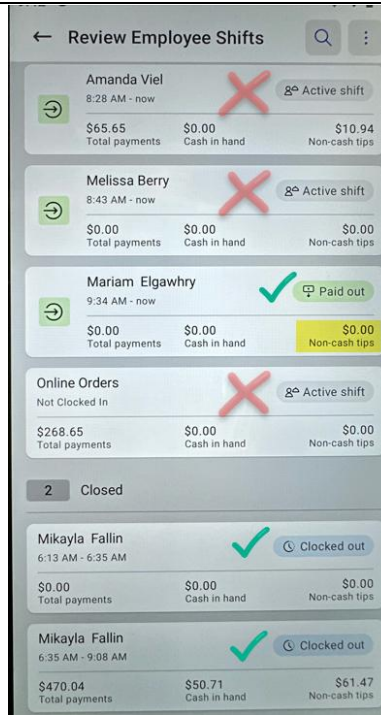
14. Log in to R365 to Review and Complete DSS from previous day.
 - a. Review Labor
 - b. Review Deposits
 - c. Review Transactions
15. Complete DSS Review.



End of Day Procedures

Before starting the Close out Day process on Toast, review Employee Shifts from the Mode Screen.

1. Ensure all Snoozer's shifts have been paid out and/or closed/clocked out.
 - a. Active Shifts need to be completed by having the Snoozer complete their Shift Review.
2. Confirm Managers/Supervisors do not have non-cash tips
 - a. If gratuity has been applied, transfer the order to the Snoozer should have received the gratuity.



END OF DAY (at-a-glance)

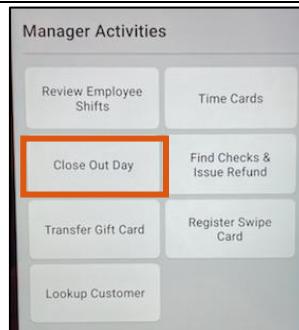
1. Collect all checkouts (Server, Barista, Host)
2. Navigate to Close Out Day on Toast device
3. Confirm all Checks closed & Print Report
4. Count Cash
5. Close out Cash Drawer on Toast Device
6. Create Deposit on Toast Device
7. End Day on Toast Device
8. Drop Deposit

Step 1: Checkouts

Once you've collected all you can complete all End-of-day procedures right from the Toast device under Close Out Day! (Don't forget Catering!)

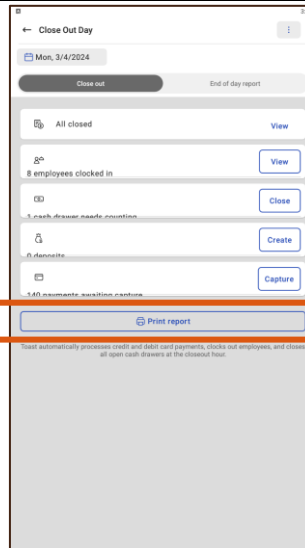
Step 2: Log into device with mag card, navigate to Close Out Day on the Mode Screen

1. Manager Mode Screen
2. Manager Activities
3. Close Out Day



Step 3: Confirm ALL CLOSED checks and ensure you have received a checkout from ALL Snoozers.

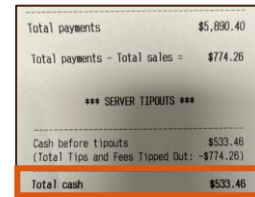
1. Print Report
 - a. Grab report from the printer
 - b. Head into the office



Step 4: Count all money and Create a Deposit (in office)

1. Count the Barista drawer to \$500 with Barista(s)
 - a. Any cash over is added to the cash collected from Servers & Baristas
 - b. Any cash under is deducted from the deposit – Barista(s) need to be documented for cash mishandling.
2. Count cash collected
3. Verify all money collected matches the Total Cash on Z report you just printed from Close Out Day.

[Click here for Cash Handling Procedures](#)



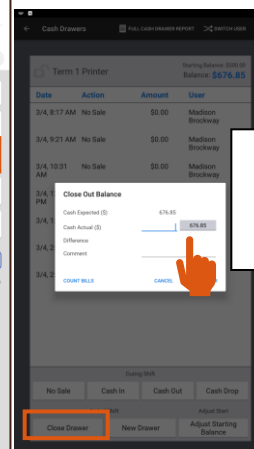
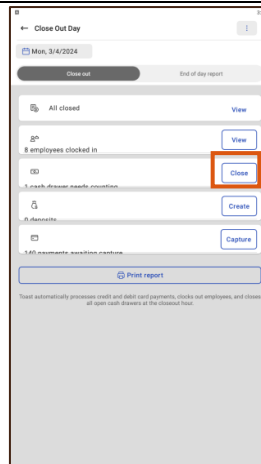
NOTE: Your Total Cash and Expected Deposit should match. If they don't, you will need to investigate root cause.

- a) Checkouts aren't complete
- b) Open checks
- c) Handhelds were offline when Snoozer completed their Shift Review

Step 5: Close Cash Drawer

1. Select Close from list.
2. Select Close Drawer
3. Select the grey box to the close-out drawer to Cash Expected \$
 - a. Example: Cash Expected is \$676.85 even though you counted the drawer to \$500

NOTE: If the cash drawer is short, you'll still enter the expected number and follow the Daily Cash Handling steps in the [Cash Handling Procedure](#) document on tE.

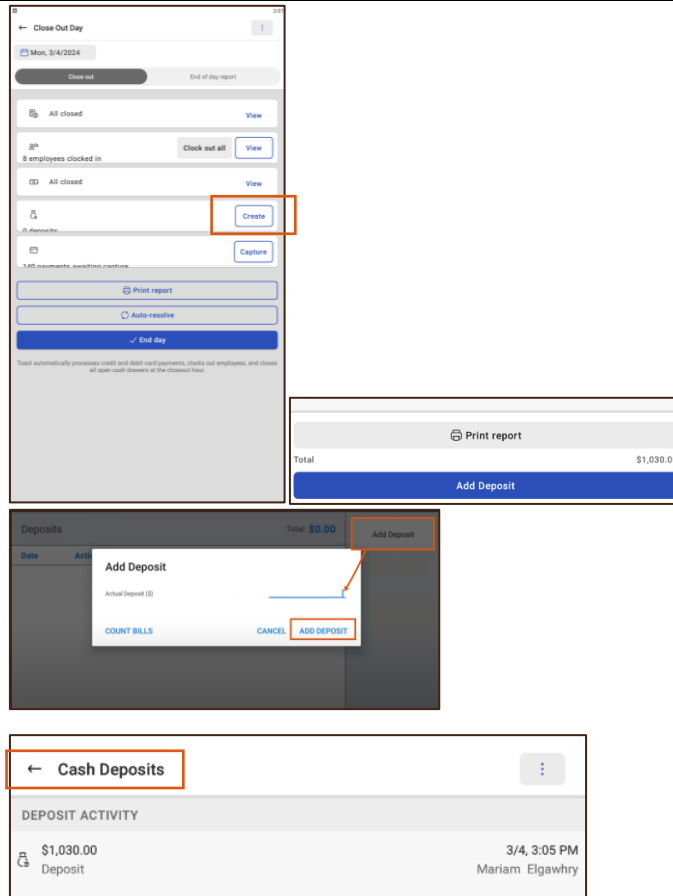


NOTE: clicking the grey box will automatically enter the cash actual!

Step 6: Create a deposit on Toast device

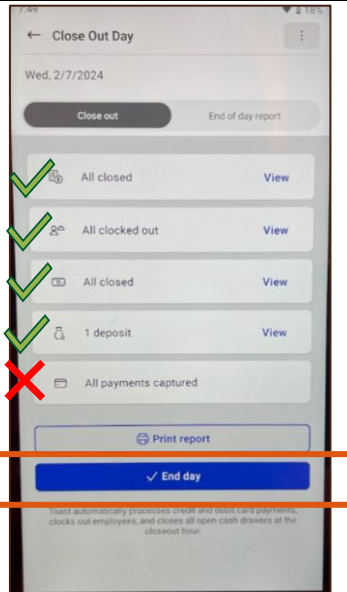
This pulls to R365, DO NOT skip this step.

1. Select, Create
 - a. Select Add Deposit
 - b. Enter your physical cash deposit amount.
 - c. Select Add Deposit
 - d. Select ← Cash Deposits



Step 7: Validate and End Day

1. All checks are closed: "All closed"
2. Verify clocked in Snoozers are still onsite. Document all edits on the Time Entry Audit log.
3. Cash drawer is closed: "All closed"
4. 1 Deposit Created
5. Do NOT capture payments
6. Select End Day

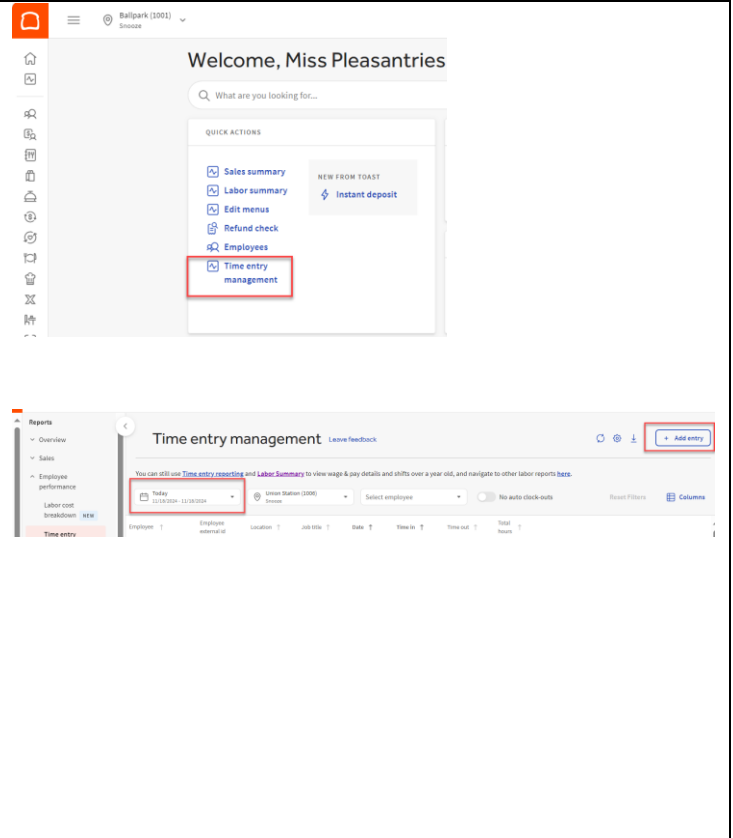


Step 8: Drop Deposit in safe.

1. See [Cash Handling Procedures](#).

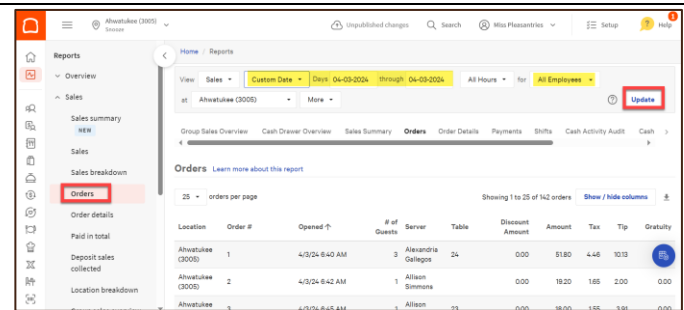
Closing Time Entry Review

1. Navigate to Toast Tab (web version) Home screen
2. Click Time Entry Management
 - a. Toggle filter to Today
 - b. Review all Snoozer entries for proper job codes and in/out times and break time.
 - i. If a Tipped Snoozer was in FULL job code all day, review Step for identifying first order, Step 3 below, and adjust time as needed.
 - c. Log any edits on the Time Entry Edits Tracking Sheet
 - d. Add time entry for Online Orders.
 - i. Online Orders will need to be clocked in for all operating hours.
 - *Multiple entries can be added if needed.

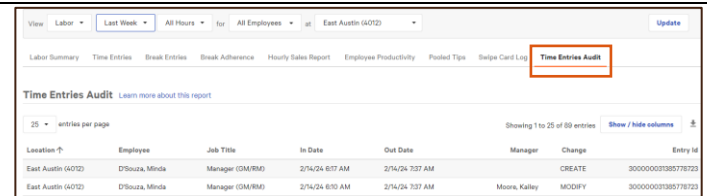


3. Steps for identifying first order
 - a. From Home page, select Sales
 - b. Select Orders
 - c. Filter to specific day
 - d. Select Snoozer's name from dropdown
 - e. Select Update

You'll now be able to identify when the Snoozer started tip producing work for the day and adjust their Position Full/ Position Tipped time accordingly.

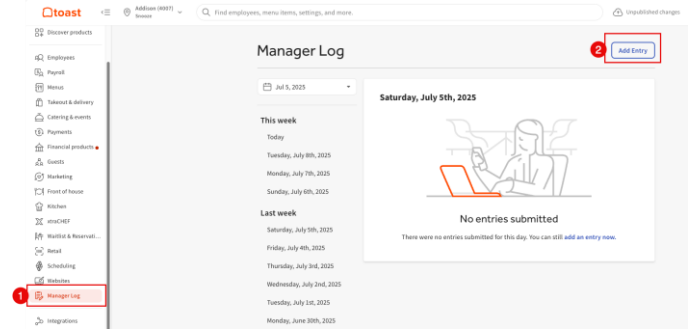


4. Review Time Entry Audits and ensure
 - c. All are logged on the Time Entry Edits Tracking Sheet
 - d. Managers have NOT adjusted their own entries without RM approval



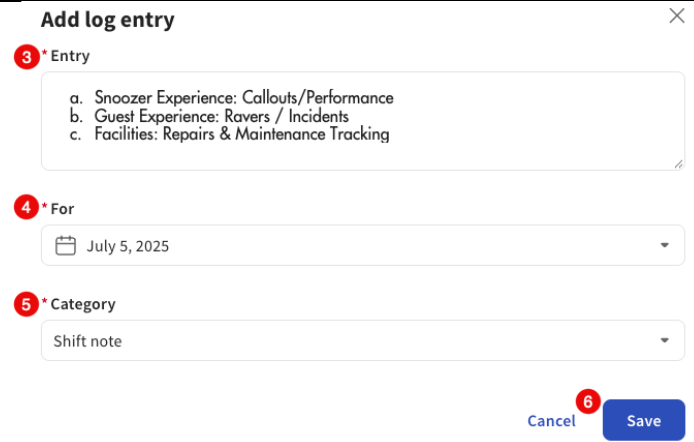
Creating Shift Notes

1. Navigate to ToastTab.com and select Manager Log from the menu on the left of screen
2. Select Add Entry from the upper right corner of screen

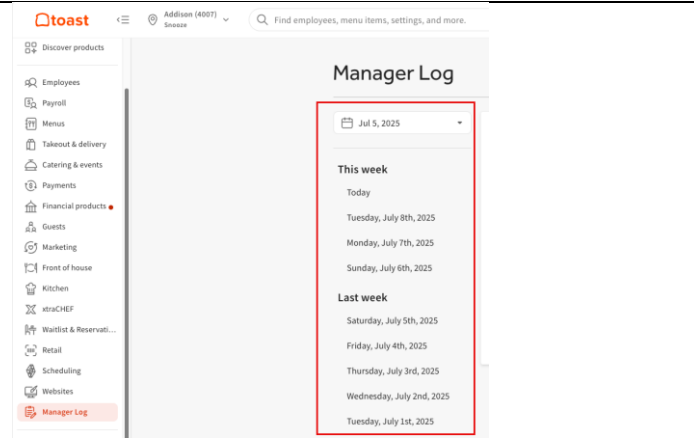


3. Use the following prompts to summarize the shift in the ***Entry** field
 - a. **Snoozer Experience:** Callouts/Performance*
 - b. **Guest Experience:** Ravers / Incidents
 - c. **Facilities:** Repairs & Maintenance Tracking
4. Ensure the date dropdown represents today's date in the ***For** field
5. Select **Shift Note** from ***Category** dropdown
6. Select **Save** from the bottom left corner

Please note: High-level information regarding Snoozer's performance can be added to the Shift Note. Detailed specifics need to be documented on a Note to File and uploaded to the Snoozer's Harri account.



Previously recorded shift notes can be accessed from the Manager Log page by selecting the desired date.



Once shift notes have been saved, Managers can use the **+Add reply** option to acknowledge/reply to the notes.

Editing a Server Checkout

Only a Manager can make edits to a Check-Out once it has been completed.

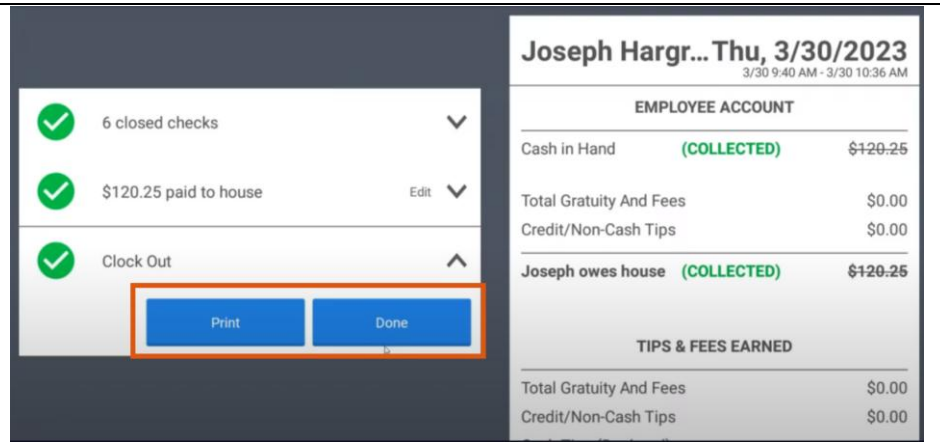
1. Manager Activities > Review Employee Shifts.

2. Select Snoozer whose checkout you would like to review/edit.

Employee	Total Payments	Cash on Hand	Non-Cash Tips
Joseph Hargraves 9:40 AM - 10:36 AM	\$120.25	\$120.25	\$0.00

3. View and edit any checks needed.

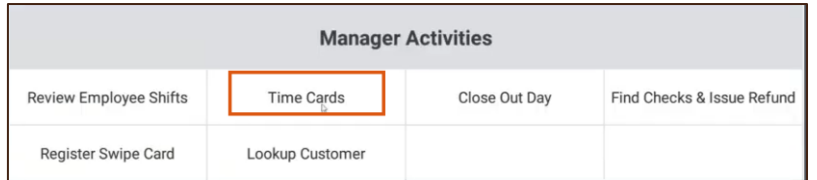
4. Print a new check and hit Done to update.



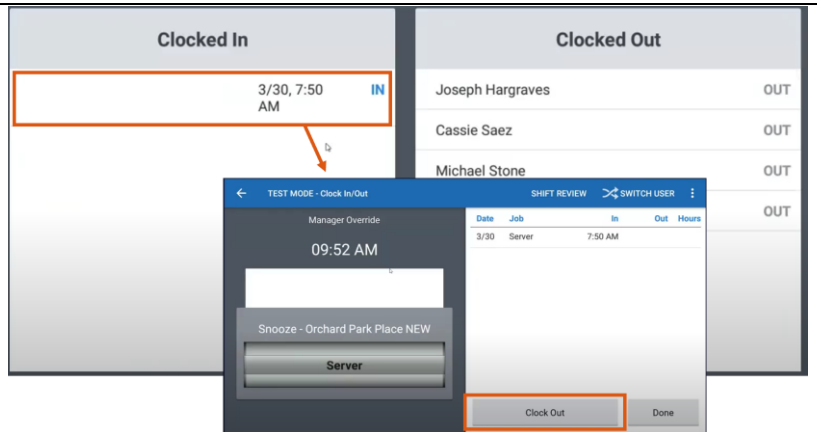
Adjusting Snoozer Clock In/Out Time

Clock Out Snoozer **from Toast Handheld or Terminal device ONLY – Do not use the Toast app.**

1. Managers Activities > Time Cards

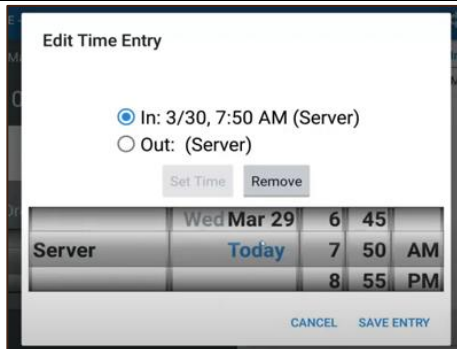


2. Select Snoozer to clock out.
3. Select Clock out.

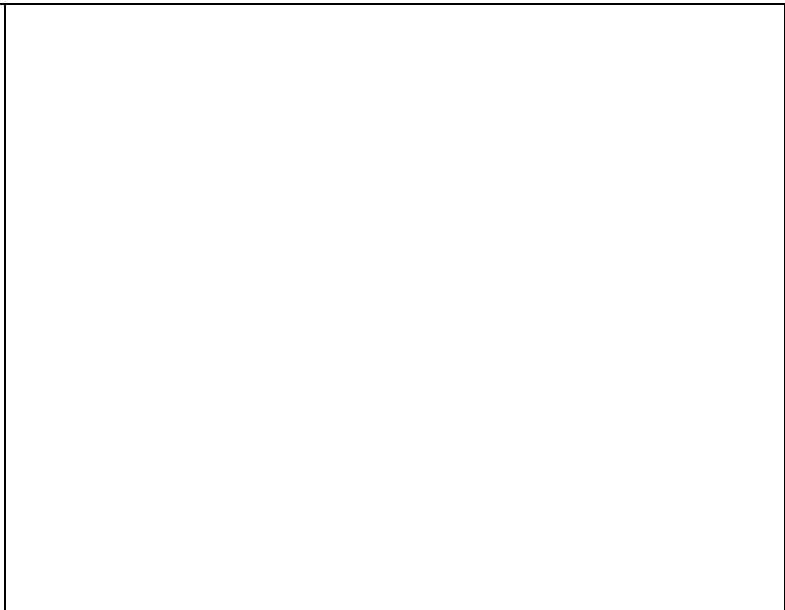


To adjust Clocked-Out Snoozer's Time:

1. From the clocked-out section under Timecard, select Snoozer
2. Adjust their in or out time (5-minute increments)
 - a. Confirm dates match
3. Hit Save Entry
4. Log changes on the Time Entry Edit Tracking Sheet
 - a. Ensure "in date" & "Out date" match
5. Snoozers need to acknowledge changes made – Signatures required within a week of changes being made and documented.

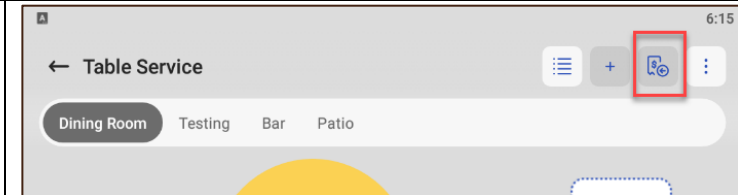


1. Select **Actions**
2. Receipt
 - Select receipt type

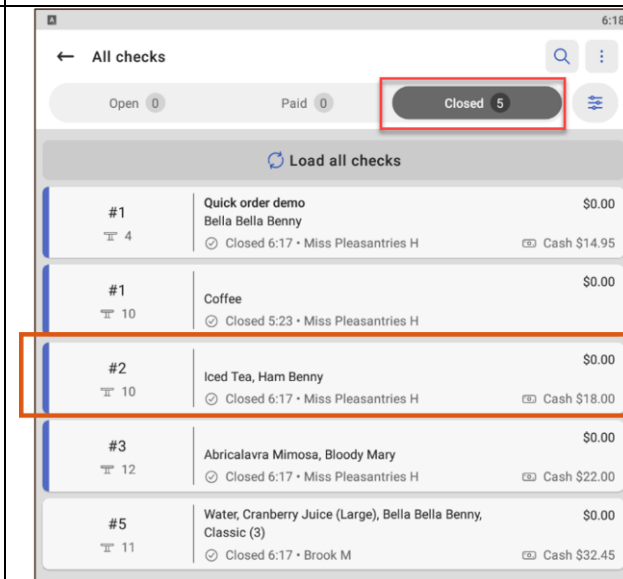


PARTIAL CHECK:
Same Day of Business:

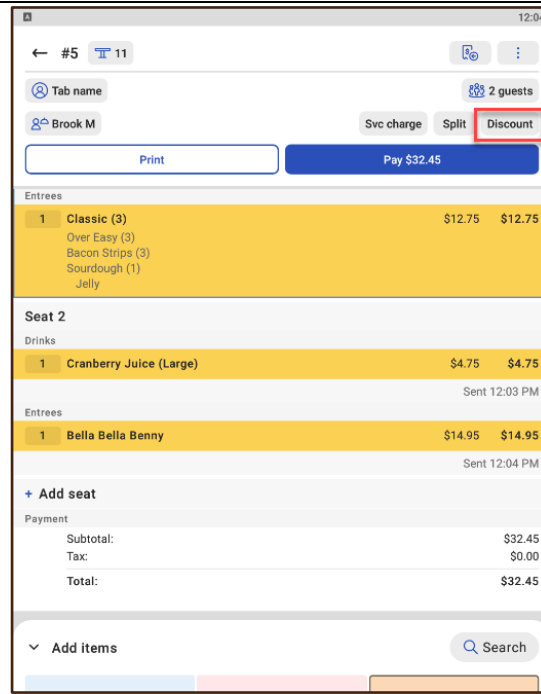
1. Table Service > Previous Checks.



2. Toggle to Closed Checks.
3. Open the check you wish to refund.



4. Select Discount
5. Apply Discount to check/item.
6. Proceed to payment.
7. Adjust payment, if applicable

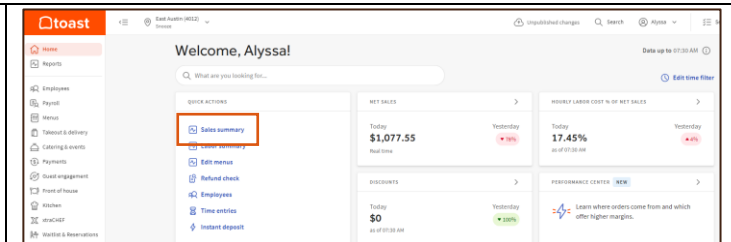


End of Week: Accounting & Payroll

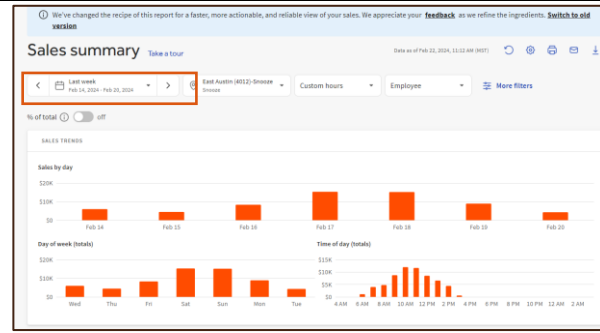
END OF WEEK (at-a-glance)

1. Confirm Deposit Accuracy
2. Confirm Time Entry Accuracy
3. Review Time Entry Audits (Goal is <60 edits per week)
4. Perform final review and approval of Tip Management for the week.
5. Submit an email to your [Payroll Specialist](#) letting them know that time entries and gratuities have been reviewed and approved for the week.

1. Confirm Deposit Accuracy
 - a. Navigate to Sales Summary Report



b. Change filter to “Last week” / Pay period in review



c. Scroll down to Cash Summary
 d. Confirm “actual deposit” matches “total cash” under Cash Activity (+/- change)
 i. If the amounts don’t match, you will need to review each individual day to find the missing/ inaccurate deposit and resolve by [Editing a Deposit](#).

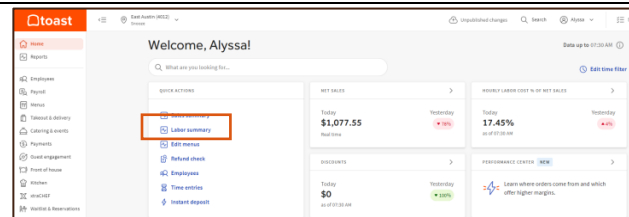
Expected closeout cash	\$978.88
Actual closeout cash	\$978.88
Cash overage/shortage	\$0.00
Expected deposit	\$478.88
Actual deposit	\$479.00
Deposit overage/shortage	\$0.12

CASH ACTIVITY	Cash activity au...
Total cash payments	\$478.88
Cash adjustments	\$0.00
Cash refunds	\$0.00
Cash before tipouts	\$478.88
Tipouts/tips withheld	\$0.00
Total cash	\$478.88

NOTE: You can only review daily deposits by individual day not several dates in a range

2. Confirm Time Entry Accuracy

a. Select Labor Summary from Toast Tab dashboard



b. Select Time Entries

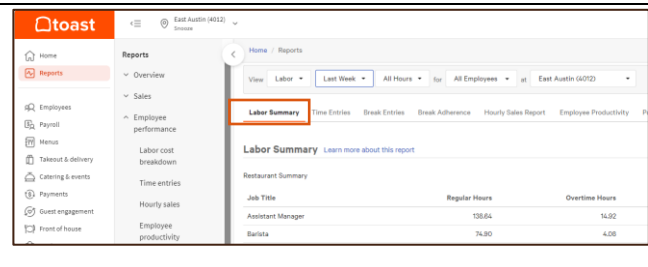
Location	Employee	Job Title	In Date	Out Date	Total Hours	Unpaid Break Time	Paid Break Time	Payable H
Quarry (A003)	Wilson, Anthony	Dish	2/2/24 7:36 AM	2/2/24 3:01 PM	7.41	0:00	0:00	
Quarry (A003)	Whitstone, Makaula	Server	2/2/24 8:45 AM	2/2/24 2:39 PM	5.89	0:00	0:00	

c. Check for Auto Clock-outs
 i. Click Filter auto clock-outs

Location	Employee	Job Title	In Date	Out Date	Total Hours	Unpaid Break Time	Paid Break Time	Payable H
Quarry (A003)	Wilson, Anthony	Dish	2/2/24 7:36 AM	2/2/24 3:01 PM	7.41	0:00	0:00	
Quarry (A003)	Whitstone, Makaula	Server	2/2/24 8:45 AM	2/2/24 2:39 PM	5.89	0:00	0:00	
Quarry (A003)	Wasson, Westley	Server	2/2/24 7:27 AM	2/2/24 2:08 PM	6.85	0:00	0:00	

d. Select the auto clock-outs
 i. Adjust entries accordingly
 e. Log ALL edits on the Time Entry Edit Tracking sheet

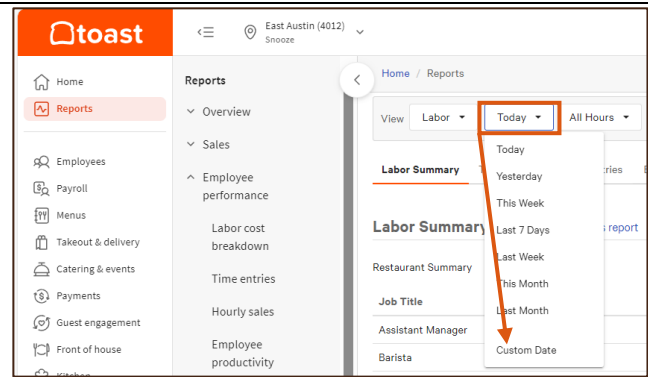
f. Navigate to Labor Summary Tab



g. Change your date range from Today to the week you want to review and Select Update
 h. Review Job Code Summary for:
 i. Clock-ins & outs are accuracy
 ii. Correct job codes

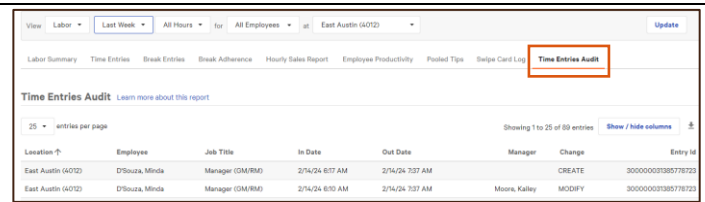
Red flags: high meeting hours, barista/server full, Managers, Supervisors, and/or Trainees (see: Step for identifying first order, below)

i. Edit and track on Time Tracking Sheet, as needed. NOTE: Snooze Standard: less than 60 entries a week

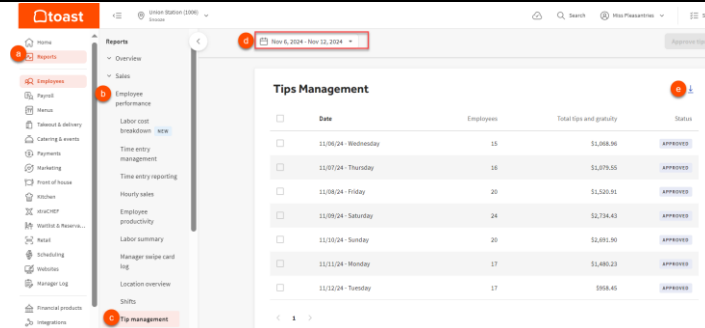


3. Review Time Entry Audits to ensure
 a. All edits are logged on the Time Tracking Sheet
 b. Managers have NOT adjusted their own entries

NOTE: Snooze Standard: less than 60 entries a week



4. Perform final review and approval of Tip Management for the week.
 a. Navigate to Reports
 b. Employee Performance
 c. Tip Management
 d. Select date range for previous week
 e. Download Weekly report. See instructions for [downloading an excel file](#) for details on how to download and filter the report.
 i. Confirm that the amount shown in the Tips and gratuity after pooling field for Online Orders, Catering, and After-Hours is \$0



5. Submit an email to your [Payroll Specialist](#) letting them know that time entries and gratuities have been reviewed and approved for the week. Include Payroll Adjustment Form, when applicable