Qwickserve
FOOD SERVICE SIMPLIFIED

QwickServe Cloud

User Guide

PETROSOFT

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QWICKSERVE CLOUD

Getting Started with QwickServe Cloud

In this section, you will learn how to configure QwickServe Cloud settings.

> ⓘ To get more information about the general workflow on how to set up the QwickServe solution from the scratch, refer to the QwickServe Quick Start Guide.

Managing QwickServe Users

All user management operations are performed on the C-Store Office side.
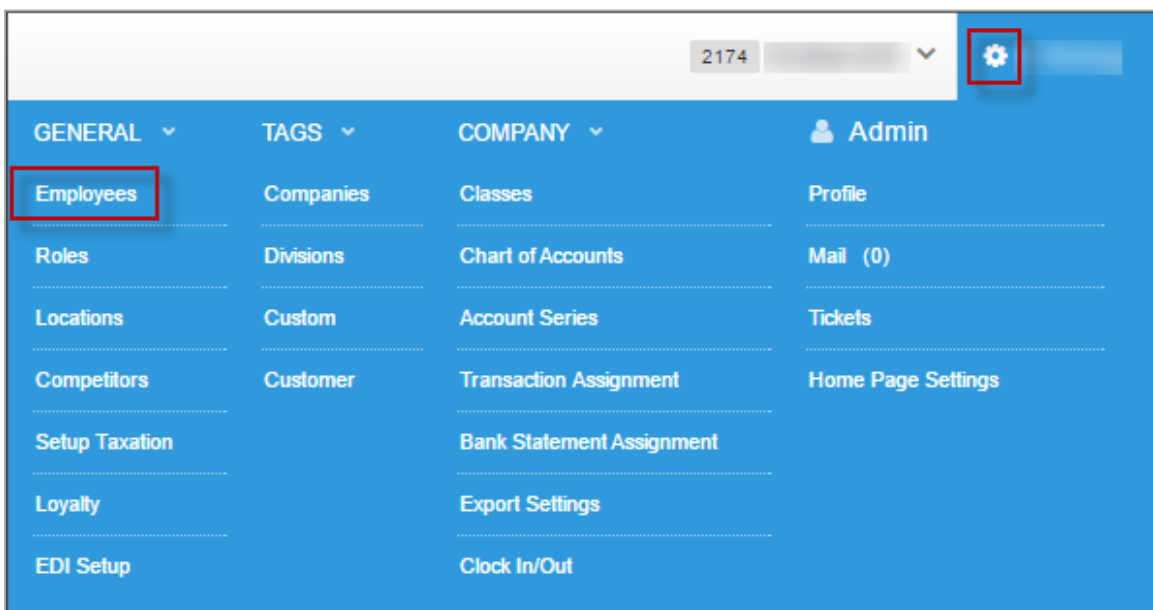
To introduce a new QwickServe user, follow the steps:

1. Create a CSO user.
2. Select the QwickServe role for the user.
3. Provide the user with the QS related permissions.

Creating CSO User

First you create the user and then you provide access to QS related permissions when editing the user.

To create a new C-Store Office user:

1. Go to **Settings** > **Employees**.

2. Click **New**, specify the following user information and then click **Save**:

    o First Name

    o Last Name

    o PIN. This PIN will be used as the Administrator PIN to access the administrative interface of the QwickServe terminal. For more information, see QwickServe Self-Service Ordering Kiosk / Terminal (SSOT) Manual.

    o Workplace (QwickServe station)

    o Role

QwickServe Roles and Roles Templates

There are the following QwickServe related role templates available in the CSO:

- **Prepstation**. Provides access to the QS prepstation, where order goes from QS Terminal, QS Mobile or QS Embedded.

- **QSEmbedded**. Provides access to QS Embedded - version of QwickServe embedded into the POS device.

- **QS Driver**. Provides access to QwickServe delivery driver features.

- **Terminal**. Provides access to the administrative interface of the QwickServe terminal.

> (i) To view the role templates, you need the system user's permissions.

To view the role templates and manager permissions within them, go to **Settings** > **General** > **Roles** > **Role Templates**.

Role Templates list ☆

Template Id	Template Name	Is System
11	Accountant	No
1	Admin	Yes
6	Assistant Manager	No
7	Cashier	No
24	DemoStation	No
9	Dispatcher	No
10	Driver	No
100	Everything is available	No
101	Everything is excluded	No
3	Executive	No
102	External User	No
5	Manager	No
8	Operator	No
2	Owner	No
23	PrepStation	No
20	Programmer	Yes
104	QS Driver	No
25	QSEmbeded	No
4	Supervisor	No
21	Support	Yes
22	Terminal	No

For more information on roles, see the Roles Management Permissions section in Petrosoft Cloud Help.
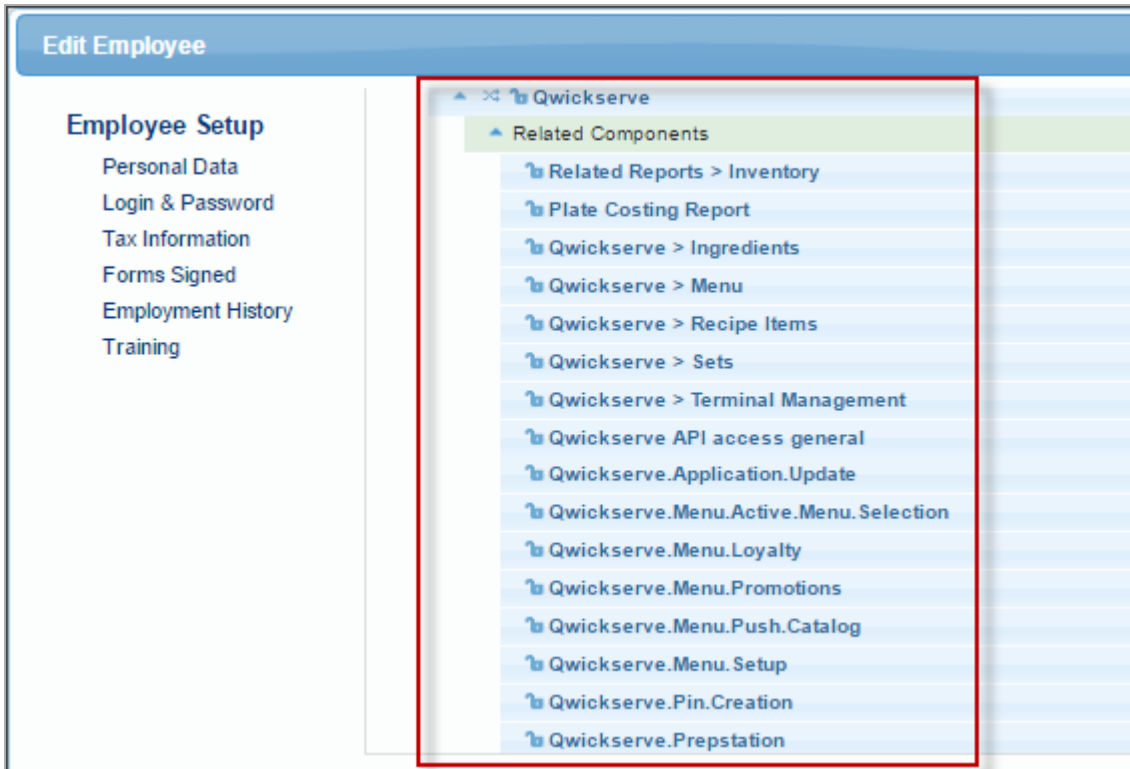
Providing User Permissions

To provide the user with the QS related permissions, follow the steps:

1. Select the user and then click **Edit**.
2. Click **Advanced**.
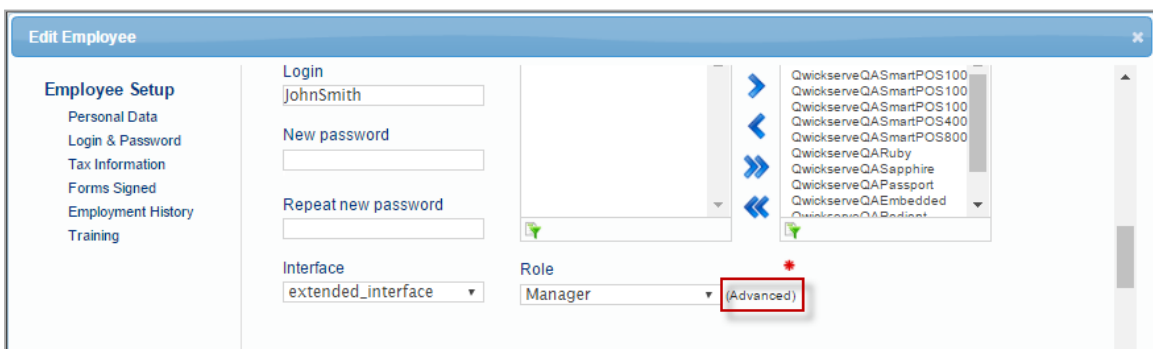
3. Enable the QwickServe tag and then turn on the QwickServe components you want to provide to the current user.

4. Click **Save**.

The changes are automatically pushed to the QS terminal with the next terminal update.

QwickServe Menus

You can work with the QwickServe menus on the following levels:

- On the account level
- On the station level
- At the KDU and SSOT devices

> To streamline the process of menu setup, you can use a menu template. For more details, see Working with Menu Template.

> To shorten the time for the menu setup, you may order the QwickServe Menu Build Service suggested by Petrosoft in addition to the food service solutions. Learn more and buy now.

Working with Menus on Account Level

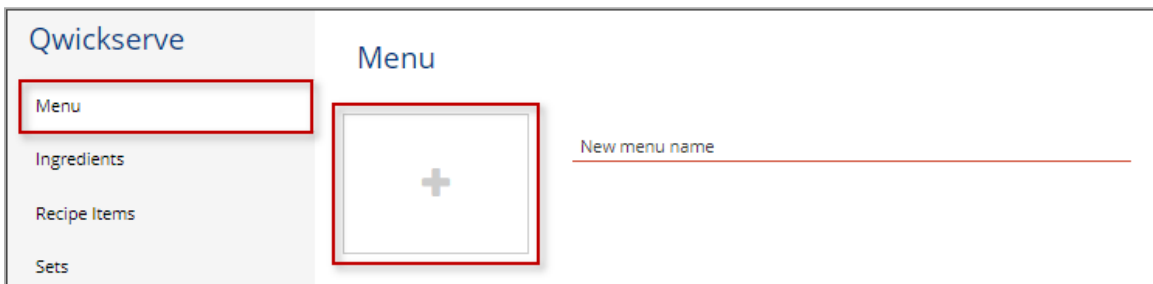You can perform the following actions with the QwickServe menus on the account level:

- Creating New Menu
- Configuring Menu Basic Settings

- Copying Menu

- Deleting Menu

- Working with Menus List

Creating New Menu

To create a new menu, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. Click the plus icon and then enter the name for the new menu.

3. Create the menu structure by adding categories and subcategories. For details, see About Menu Structure.

4. Populate the menu categories and subcategories (if any) by items and recipe items. For details, see QwickServe Items.

5. Configure the menu settings. For details, see Configuring Menu Settings.

6. To apply the created menu to all locations on the account, click the **Accept Changes** button.
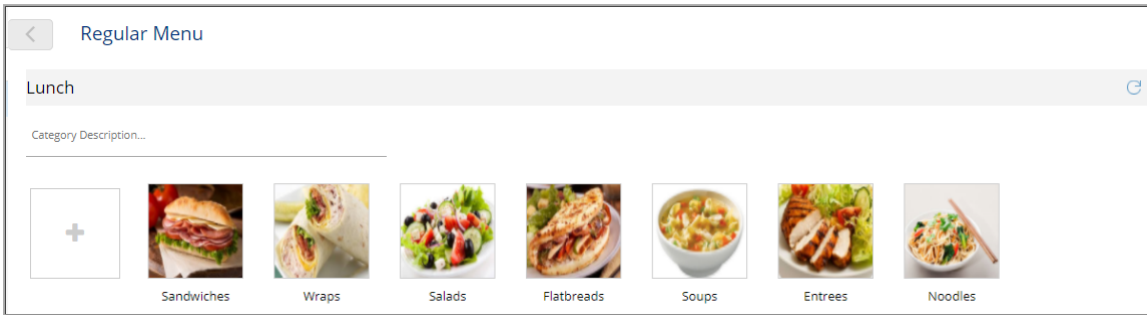
About Menu Structure

The QwickServe menu can have any hierarchy, according to the client's business logic. As a rule, it contains item categories and subcategories within them.

For example, you can create menu with two categories – 'Breakfast' and 'Lunch'.
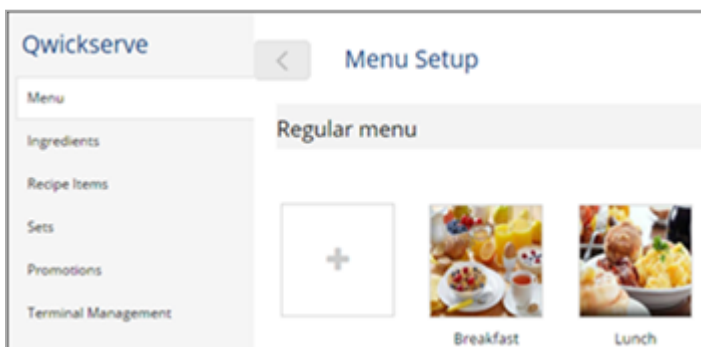
The 'Lunch' category, for example, can contain the following subcategories.

Configuring Menu Basic Settings

You can configure the following menu basic settings on the account level:

- Editing Menu Name
- Adding or Changing Menu Theme
- Moving Menu Categories and Items

Editing Menu Name
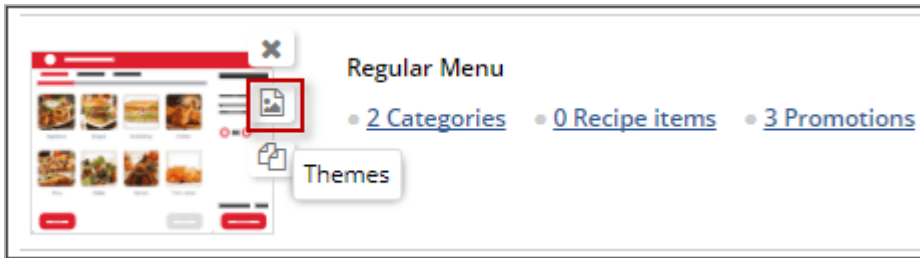
To edit the menu name, follow the steps:

1. In the **QwickServe** menu, click **Menu**.
2. In the menus list, select the menu and then click its name.
3. Enter a new name for the menu.
4. Click any free area, to save the new menu name.
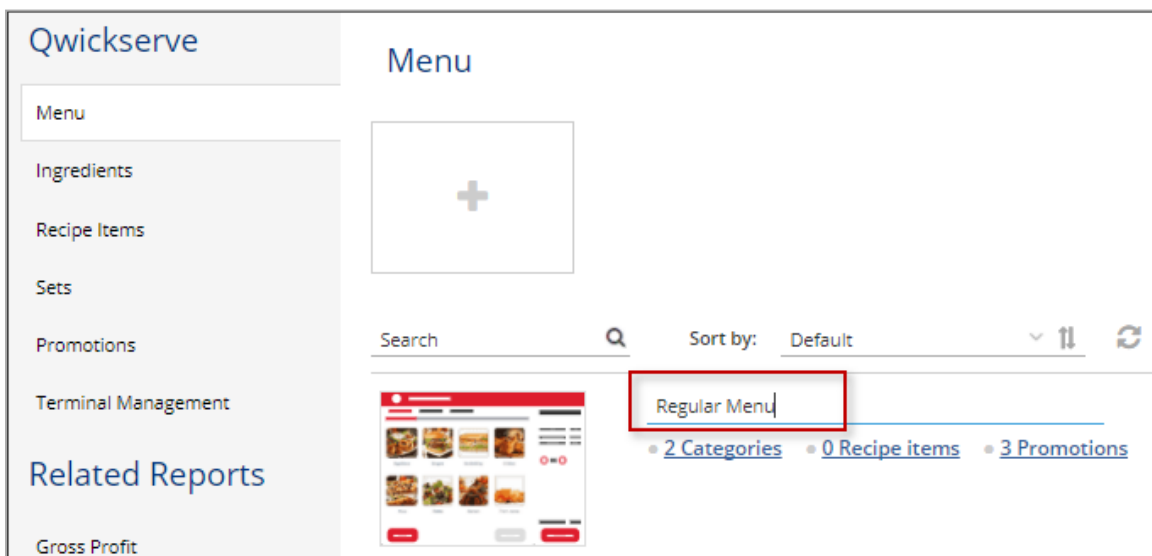
Adding or Changing Menu Theme

To add a theme to the menu or change it, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. In the menus list, select the menu and then click its image.

3. At the right of the menu image, click the **Themes** icon.

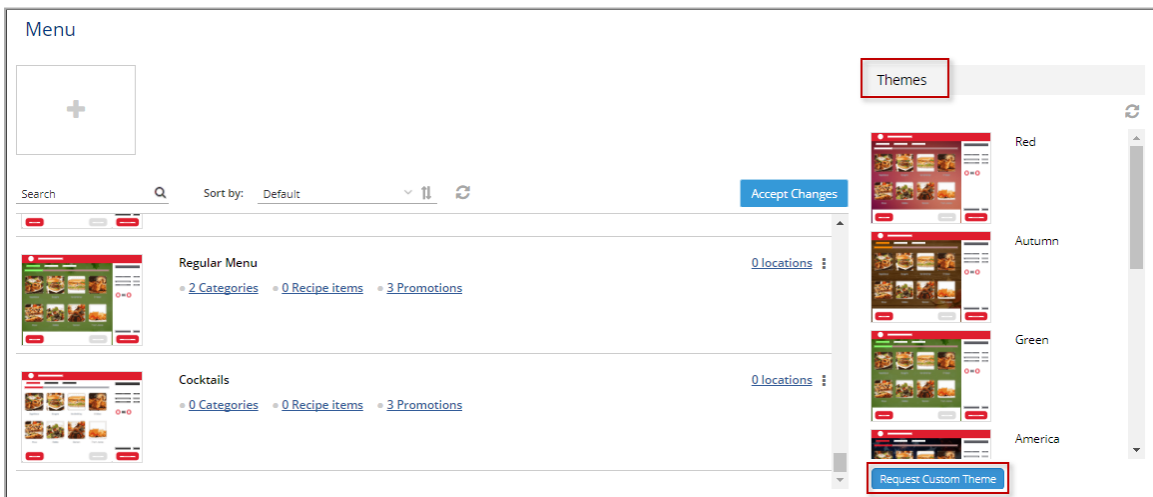4. In the **Themes** list at the right of the page, select the theme and double-click it.

In case you need to add your custom theme to the menu, you can request it.
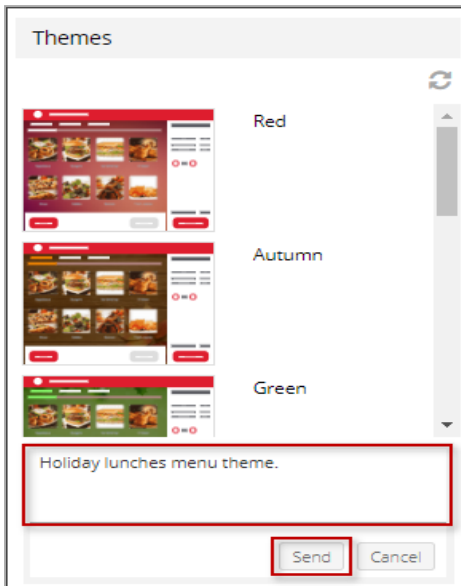
Requesting Custom Menu Theme

To request a custom menu theme, follow the steps:

1. At the right of the menu image, click the **Themes** icon.

2. At the bottom of the **Themes** list, click the **Request Custom Theme** button.

3. Enter your theme description and then click the **Send** button.

Moving Menu Categories and Items

To move the categories within the menu and/or the items withing the menu categories, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. In the menus list, select the menu and then double-click it.

3. Depending on what you want to move, do one of the following:

   o To move the menu category, drag and drop it to the place you want.

   o To move the items within the menu category, double-click this category and then drag and drop the item to the place you want.
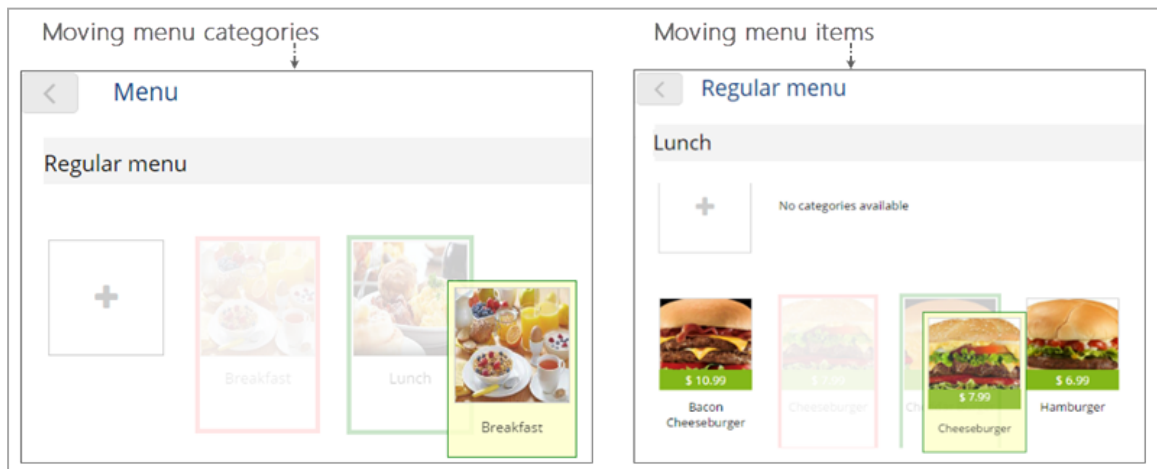
Copying Menu

To copy the menu, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. In the menus list, select the menu and then click its image.

3. At the right of the menu image, click the **Copy** icon.
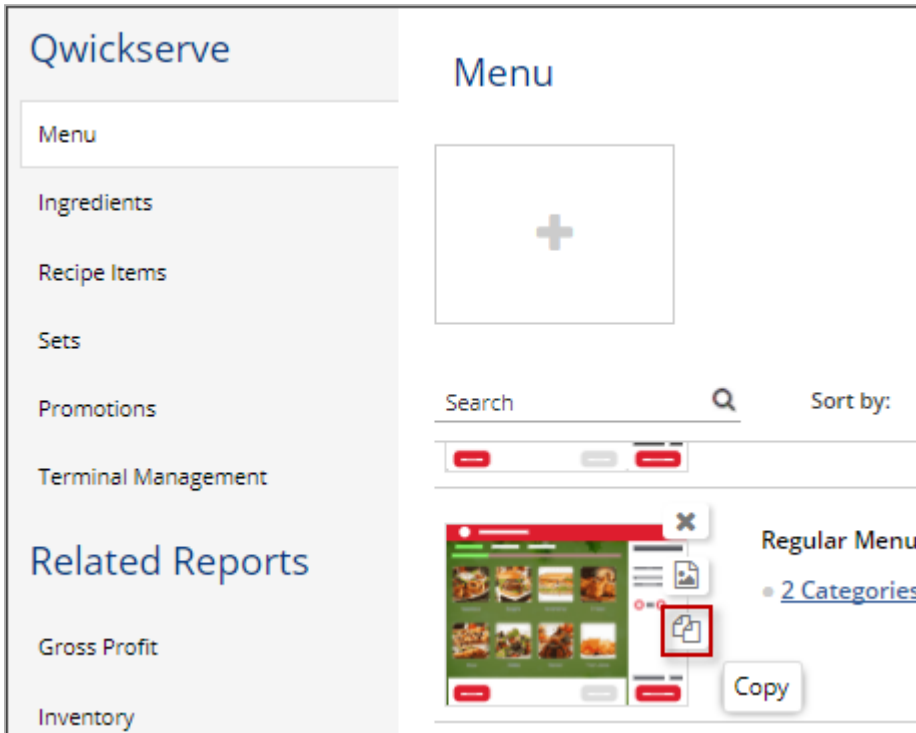
4. Wait until the menu is copied.

5. (Optional) Change the menu name and then click any free area to save it. By default the copied menu is named *Original menu name + copy +copy number*.
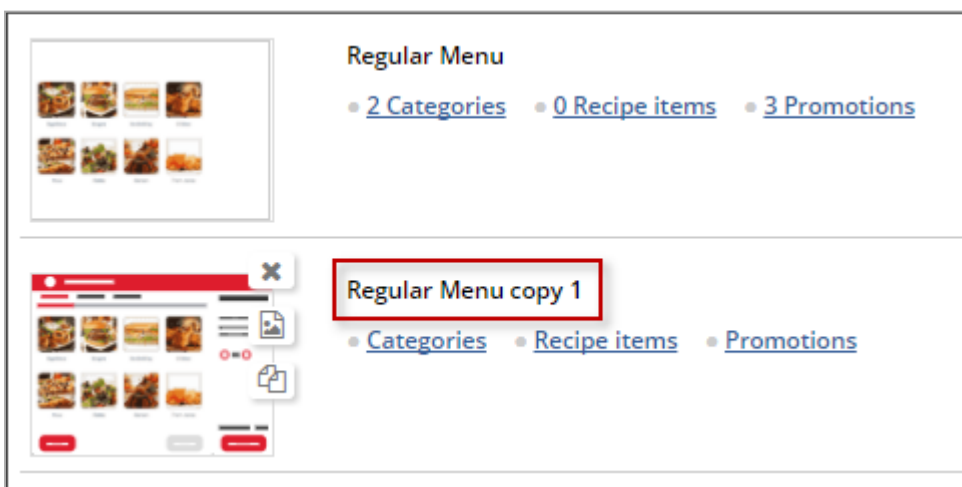
Deleting Menu

To delete the menu, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. In the menus list, select the menu and then click its image.

3. At the right of the menu image, click the **Remove** icon.
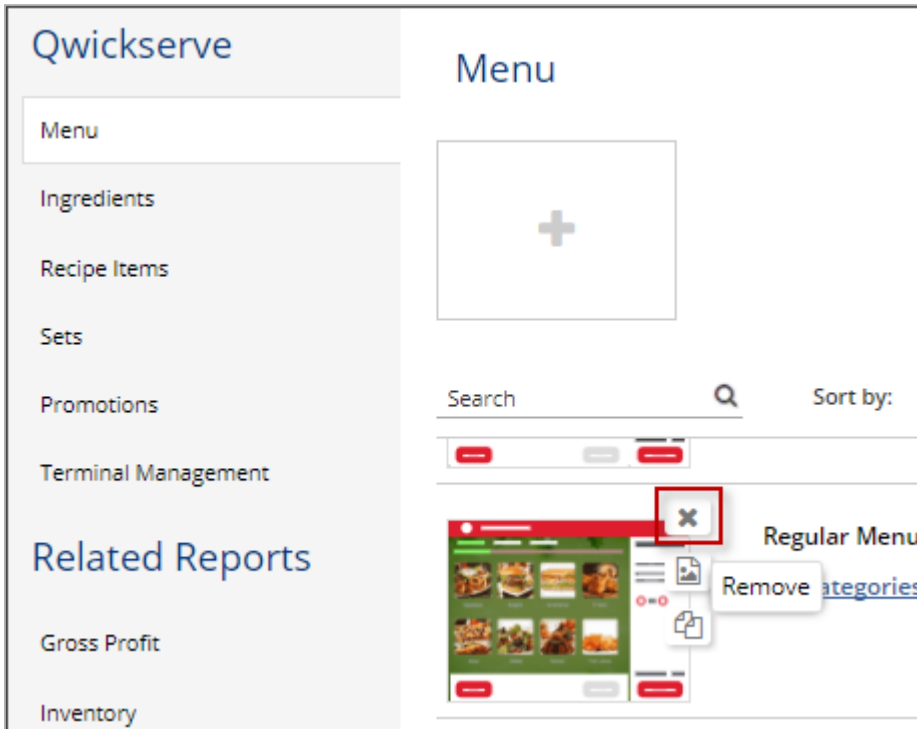
Working with Menus List

You can perform the following operations with the menus list:

- Searching for Menu

- Sorting Menus

- Refreshing Menus List

- Accepting Changes

Searching for Menu

To search for a menu by its name, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. Above the menus list, click the **Search** field and then start typing the menu name.

3. Only the menus containing the symbols in the search field will be displayed.
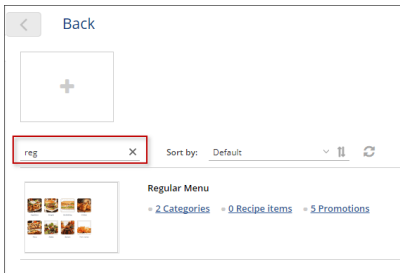
To clear the Search field, click the cross sign at the right of the field.

Sorting Menus

To sort the menus list, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. Above the menus list, in the **Sort by** list, select one of the following sorting criteria:

   o **Name**

   o **Number of Locations**

   o **Number of Categories**

   o **Number of Recipes**

3. At the right of the **Sort by** list, click the ascending/descending icon to sort the list by the selected criteria in ascending or descending order.
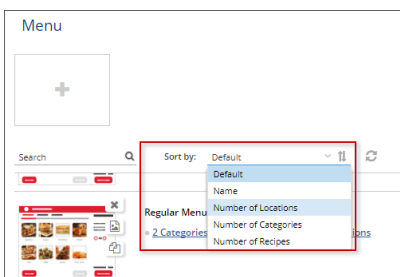
Refreshing Menus List

To refresh the menus list, above the list, click the refresh icon.
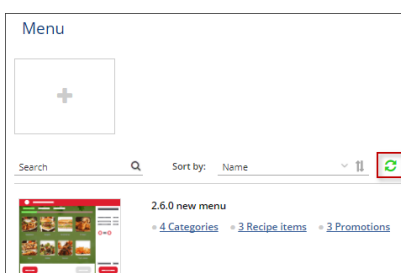
Accepting Changes

To accept the changes in one or several menus on the account level, at the top right of the menus list, click the **Accept Changes** button.

Working with Menus on Station Level

You can perform the following actions with the menus on the station level:

- Configuring Time Targeting Menus for Station
- Activating/Deactivating Menu for Station
- Filtering Stations List

Configuring Time Targeting Menus for Stations

You can create different menus, for example the 'Regular' and 'Holiday' menus, and show them to your clients within specified periods of time during a day and/or a week. You can also configure different active menu periods for each station on your account.

The time targeting menus can be configured in the following ways:

- For one specific station
- For several stations at once

Configuring Menu for One Station

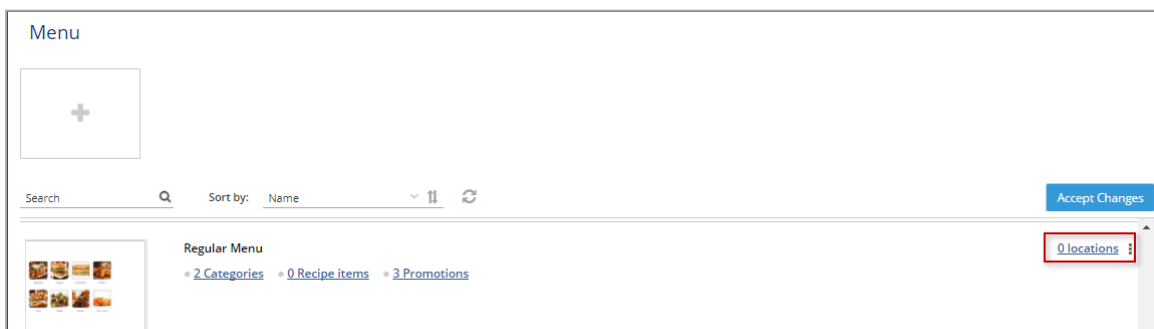To configure the time targeting menus on the account's station, follow the steps:

1. In the **QwickServe** menu, click **Menu**.
2. At the right of the menu you want to activate, click the locations link.

> (i) The number at the left of the locations link indicates the number of stations for which this menu is active.

3. Wait until the list of account's stations is uploaded.

4. Add the active period:

    a. Move the mouse pointer over a location and then at the left of the **Period** column, click the plus sign.

    b. Select the weekdays, during which the menu will be active.

    c. Specify the hours of the selected weekdays, during which the menu will be active.

5. (Optional) In case you need more active periods, repeat step 4 as many times as you need.

> (i) The configured time targeting menu is only visible for the station when the menu is activated for this station. For details, see Activating/Deactivating Menu for Station.

The exclamation mark displayed in the Active column, at the right of the Active/Inactive icon, indicates that one or several active periods are not configured properly.
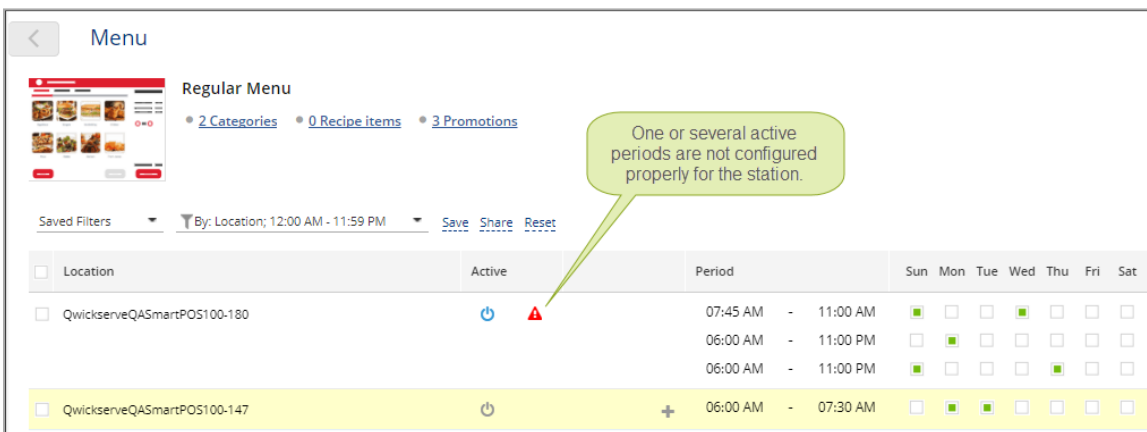
Configuring Menu for Several Stations

To configure time targeting menu for several stations at once, follow the steps:

1. Open the locations list for the selected menu. For details, see steps 1-3 at Configuring Menu for One Station.

2. Select several locations.

3. Add one or several periods for any selected location. For details, see steps 4-5 at Configuring Menu for One Station.

4. At the bottom right of the selected locations, click **Update**.
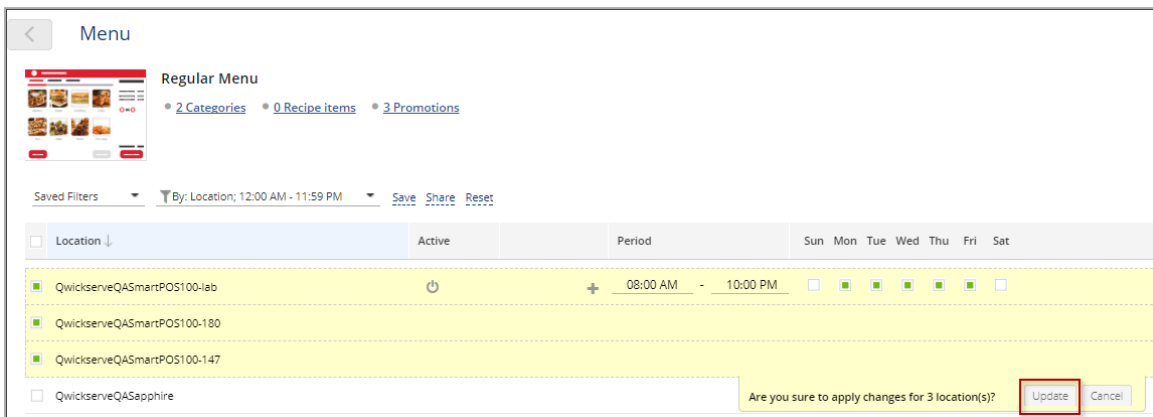
Activating/Deactivating Menu for Stations

You can activate or deactivate a menu for the stations in the following ways:

- For one specific station
- For several stations at once

Activating/Deactivating Menu for One Station

To activate or deactivate a menu for a specific station, follow the steps:

1. In the **QwickServe** menu, click **Menu**.

2. At the right of the menu you want to activate, click the locations link.
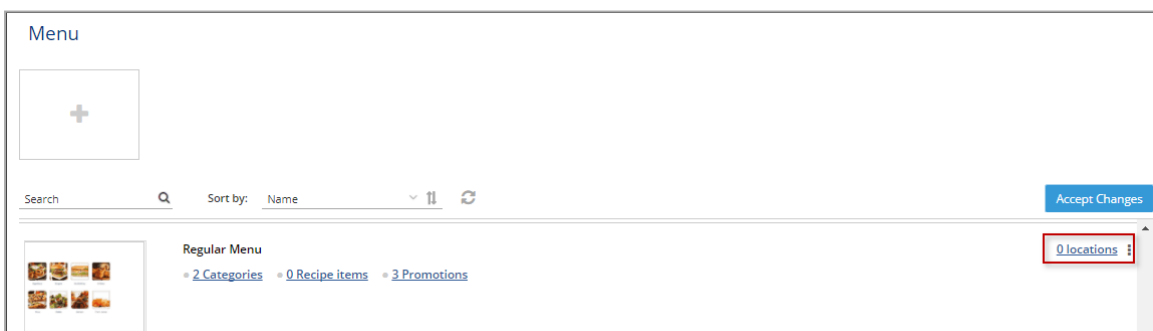
3. Wait until the list of account's stations is uploaded.

4. Make sure the active period is configured for the station. If not, first configure it. For details, see Configuring Time Targeting Menus for Station.

5. In the **Active** column, click the **Active/Inactive** sign for the station.
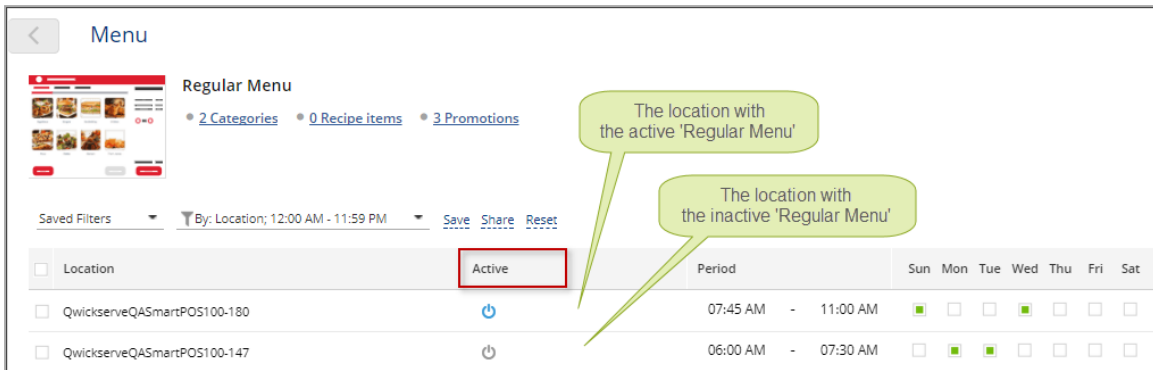
The number of locations for which the menu is active is displayed then in the menus list > menu > the locations link.

Activating/Deactivating Menu for Several Stations

To activate or deactivate a menu for a specific station, follow the steps:

1. Open the locations list for the selected menu. For details, see steps 1-3 at Activating/Deactivating Menu for One Station.

2. Select several locations.

3. Activate or deactivate any of the selected stations. For details, see step 5 at Activating/Deactivating Menu for One Station.

4. At the bottom right of the selected locations, click **Update**.
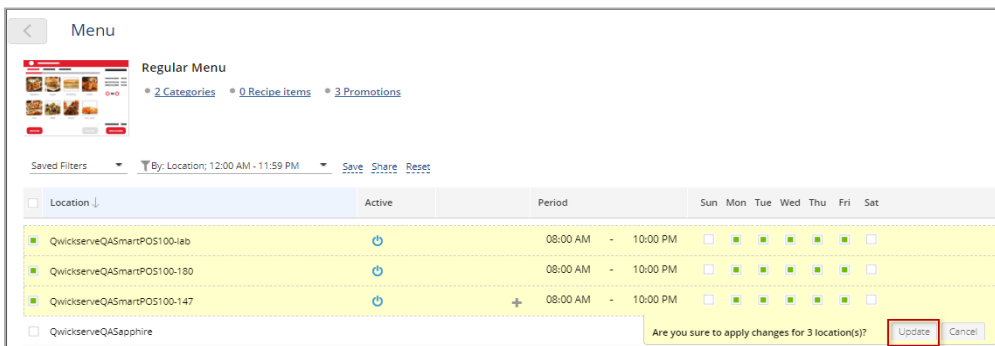
Filtering Stations List

You can perform the following operations with filters in the locations list:

- Applying Filter
- Saving Filter
- Sharing Filter

- Resetting Filter
- Deleting Filter

Applying Filter

To apply a filter to the locations list, follow the steps:

1. Above the locations list, click the filter sign.

2. Select one or several of the following filtering criteria:

   o **By** - select **Location** or **Tag**

   o **Locations** - select one or several locations from the list

   o **Active** - select **Active** or **Inactive** locations

   o **Time** - specify the filtering period

3. Click the **Apply** button.
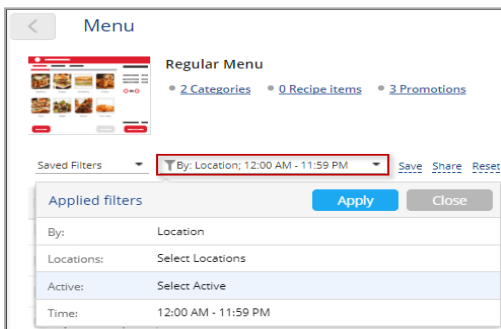
You can also apply already saved filter by selecting it at the right of the filter sign, from the **Saved Filters** list. Fore more information on how to save a filter, see Saving Filter.

Saving Filter

To save the applied filter, follow the steps:

1. At the right of the filter sign, click **Save**.

2. Enter the filter name and then click the check sign.
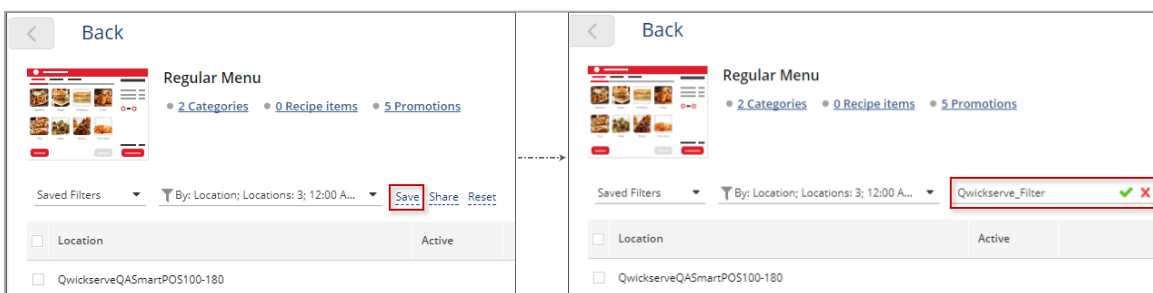
The saved filter is displayed at the right of the filter sign, in the Saved Filters list.
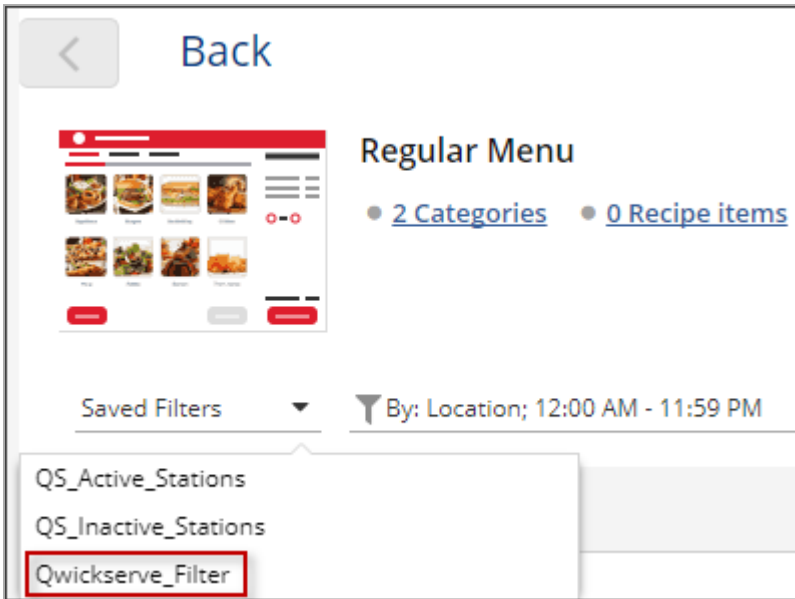
Sharing Filter

You can share the link for the saved filter with other C-Store Office users.

To copy the link for the saved filter, follow the steps:

1. Apply the filter to the locations list. For details, see Applying Filter.

2. At the right of the filter sign, click **Share** and then click **Copy**.
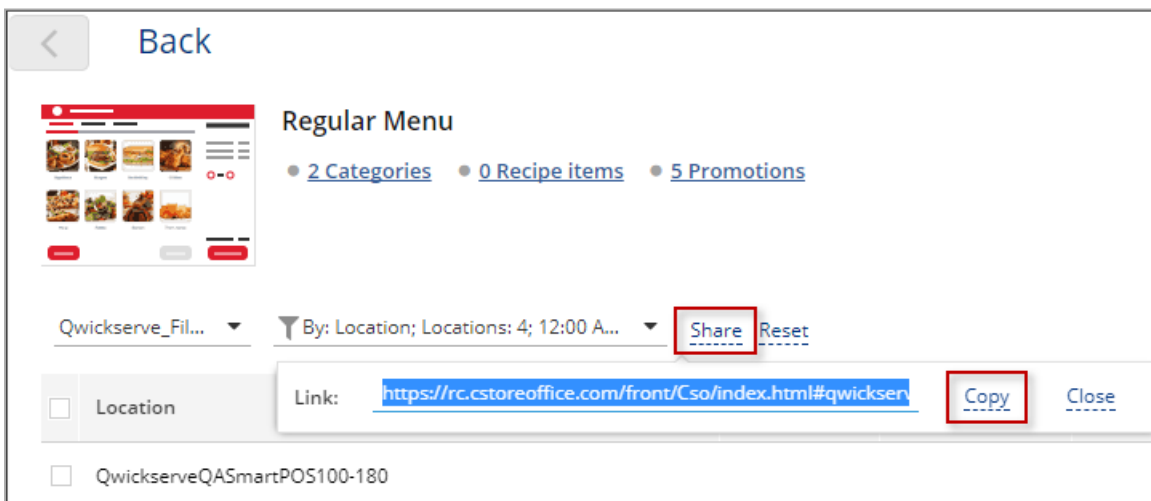
Resetting Filter

To reset the applied filter, at the right of the filter sign, click **Reset**.
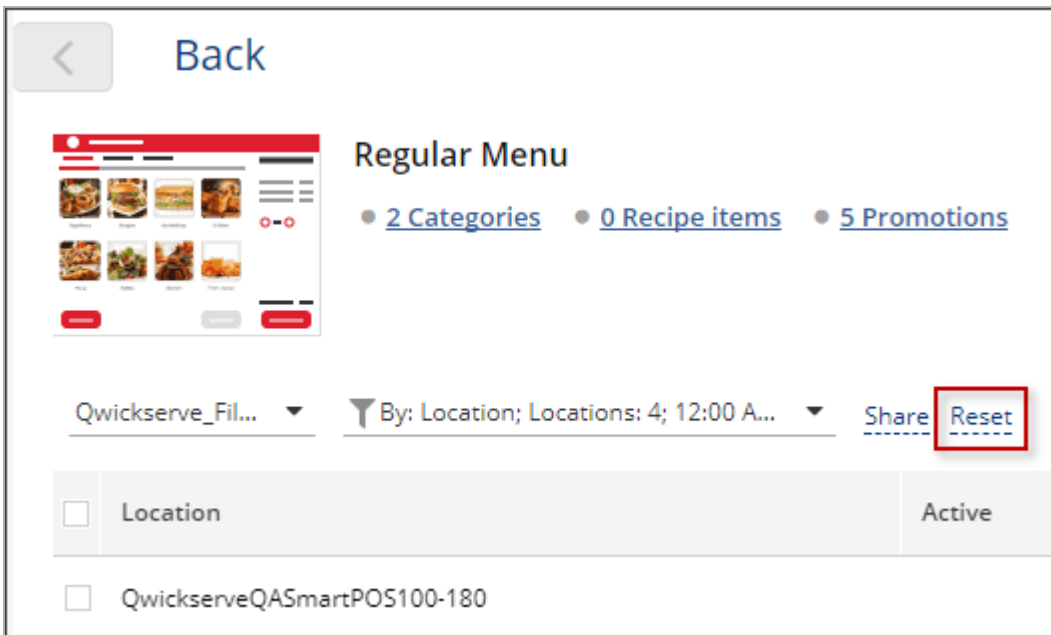
Deleting Filter

To delete the saved filter, follow the steps:

1. At the right of the filter sign, click the **Saved Filters** list.

2. Select the filter you want to delete and then at the right of the filter, click the cross sign.
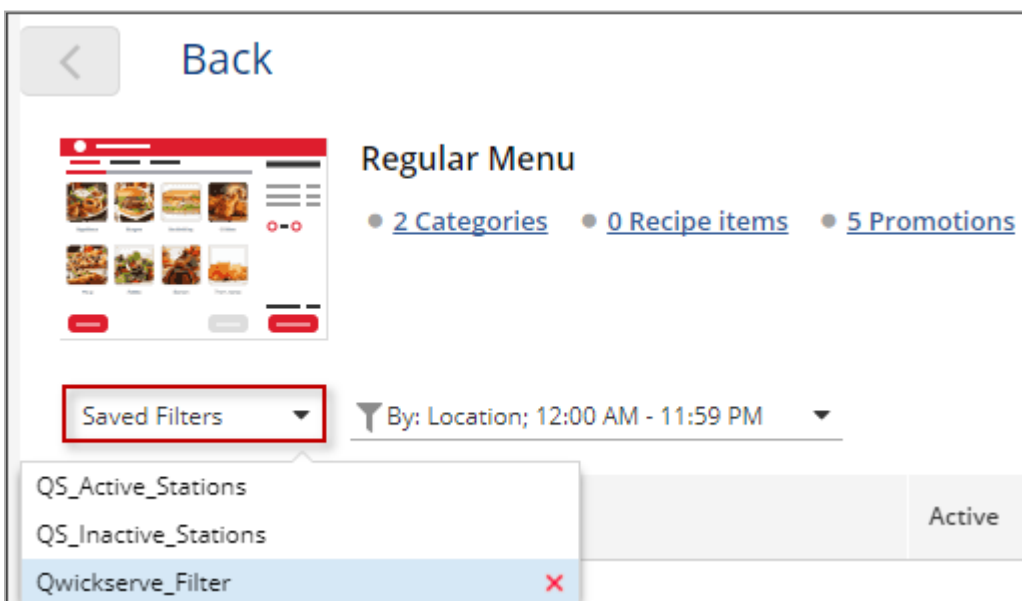
Working with Menu Template

To streamline the process of menu setup, you can prepare a menu template. The menu template is a file in the XLS format. In the menu template, you can provide information about all items that you want to add to a QwickServe menu: recipe items, ingredients, sets, add-ons and so on. The populated menu template is then used to set up the menu in QwickServe Cloud.

To download a menu template, go to Petrosoft Cloud Help > QwickServe > Downloads: QwickServe.

General Workflow

The main workflow for using the menu template is the following:

1. A customer downloads a menu template and enters available data in the template. When entering the data, try to provide the most comprehensive information about the menu items. For more details, see Preparing Menu Template.

2. Once the menu template is ready, the customer can contact a Petrosoft representative and send the prepared template to the representative. Together with the template, the customer can provide additional information that relates to the menu, for example, images or photos that need to be uploaded to the system.

3. The Petrosoft representative responsible for data input reviews the obtained menu template, makes all necessary edits (if necessary) and sends the updated template to the customer for approval.

4. Once the template is finalized and approved, the Petrosoft representative enters the menu data in the system using the prepared template.

Preparing Menu Template

To prepare the menu template, do the following:

1. Download the menu template using the link above.

2. Open the template.

3. Fill data in the sheets of the template document. You need to enter the following data:

   o Full Menu Version

   o Sets

   o PB Items Summary

Full Menu Version

To fill the Full Menu Version data, follow the steps:

1. Open the **Full Menu Version** sheet.

2. In the **Category Name** cell, enter the name of a category that you want to add to the menu, for example, *Burgers*.

3. (Optional) In the **Category Description** cell, enter the category description.

4. (Optional) In the cell below, enter the name of a subcategory within the category, for example, *Steak Burgers*.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	Optional ?	Hidden ?	Unit Cost, USD	Total Amount, USD	Sets Included (choices)	Add-ons
Burgers									
Category for burgers and sandwiches									
Steak Burgers						#N/A	#N/A		
						#N/A	#N/A		
		Enter the subcategory name				#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		

5. In the **Recipe Items** cell, enter the name of a recipe item, for example, *Hamburger*.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	Optional ?	Hidden ?	Unit Cost, USD	Total Amount, USD	Sets Included (choices)	Add-ons
Burgers									
Category for burgers and sandwiches									
Steak Burgers		Hamburger				#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
Enter the recipe item name						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		

6. In the **Recipe PLUs** cell, enter the PLU for the recipe item.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	Optional ?	Hidden ?	Unit Cost, USD	Total Amount, USD	Sets Included (choices)	Add-ons
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger				#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
		Enter the recipe item PLU				#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		

7. In the **Recipe Retail Price** cell, enter the retail price for the recipe item.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	Optional ?	Hidden ?	Unit Cost, USD	Total Amount, USD	Sets Included (choices)	Add-ons
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	**5.99**			#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
		Enter the recipe item retail price				#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		
						#N/A	#N/A		

8. In the **Ingredients for Recipe Items** cells, enter the names for base ingredients.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	PLU	Ingredients for Recipe Items (base items)	Portion Size	Measure Unit	Optional ?	Hidden ?
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	**5.99**	#N/A	Hamburger Bun		#N/A		
				#N/A	Hamburger Patty		#N/A		
				#N/A	Tomatoes		#N/A		
			Enter the base ingredients	#N/A	Lettuce		#N/A		
				#N/A	Onions		#N/A		
				#N/A	Pickles		#N/A		
				#N/A	Burger Sauce		#N/A		
				#N/A			#N/A		
				#N/A			#N/A		
				#N/A			#N/A		

9. In the **Portion Size** cells, enter the portion size for base ingredients.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	PLU	Ingredients for Recipe Items (base items)	Portion Size	Measure Unit	Optional ?	Hidden ?
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	5.99	#N/A	Hamburger Bun	1.00	#N/A		
				#N/A	Hamburger Patty	1.00	#N/A		
				#N/A	Tomatoes	2.00	#N/A		
				#N/A	Lettuce	1.00	#N/A		
				#N/A	Onions	1.00	#N/A		
				#N/A	Pickles	1.00	#N/A		
				#N/A	Burger Sauce	2.00	#N/A		
				#N/A			#N/A		
				#N/A			#N/A		
				#N/A			#N/A		

Enter the portion size for base ingredients

10. Remove the blank lines.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	PLU	Ingredients for Recipe Items (base items)	Portion Size	Measure Unit	Optional ?	Hidden ?
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	5.99	#N/A	Hamburger Bun	1.00	#N/A		
				#N/A	Hamburger Patty	1.00	#N/A		
				#N/A	Tomatoes	2.00	#N/A		
				#N/A	Lettuce	1.00	#N/A		
				#N/A	Onions	1.00	#N/A		
				#N/A	Pickles	1.00	#N/A		
				#N/A	Burger Sauce	2.00	#N/A		
				#N/A			#N/A		
				#N/A			#N/A		
				#N/A			#N/A		

Remove the blank lines

11. In the **Optional** and **Hidden** cells, mark the ingredients as optional or hidden.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	PLU	Ingredients for Recipe Items (base items)	Portion Size	Measure Unit	Optional ?	Hidden ?
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	5.99	#N/A	Hamburger Bun	1.00	#N/A		hidden
				#N/A	Hamburger Patty	1.00	#N/A		
				#N/A	Tomatoes	2.00	#N/A	optional	
				#N/A	Lettuce	1.00	#N/A	optional	
				#N/A	Onions	1.00	#N/A	optional	
				#N/A	Pickles	1.00	#N/A	optional	
				#N/A	Burger Sauce	2.00	#N/A	optional	

Mark the ingredients as optional or hidden

12. (Optional) In the **Sets Included** cells, enter the sets descriptions, for example, *Burger Add-ons* and *Add Cheese*.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	Ingredients for Recipe Items (base items)	Portion Size	Optional ?	Hidden ?	Sets Included (choices)	Add-ons
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	5.99	Hamburger Bun	1.00		hidden	Burger Add-ons	
				Hamburger Patty	1.00			Add Cheese	
				Tomatoes	2.00	optional			
				Lettuce	1.00	optional			
				Onions	1.00	optional			
				Pickles	1.00	optional			
				Burger Sauce	2.00	optional			

Enter the sets descriptions

13. (Optional) In the **Add-ons** cells, enter the add-ons descriptions, for example, *Coke 20 oz*.

ⓘ As add-ons, you can only add items that exist in the Price Book.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	Ingredients for Recipe Items (base items)	Portion Size	Optional ?	Hidden ?	Sets Included (choices)	Add-ons
Burgers									
Category for burgers and sandwiches									
Steak Burgers	1000	Hamburger	5.99	Hamburger Bun	1.00		hidden	Burger Add-ons	Coke 20 oz.
				Hamburger Patty	1.00			Add Cheese	
				Tomatoes	2.00	optional			
				Lettuce	1.00	optional			
				Onions	1.00	optional			
				Pickles	1.00	optional			
				Burger Sauce	2.00	optional			

Enter the add-ons descriptions

14. (Optional) In the **Description** cell, enter the recipe item description.

Sets

To fill the Sets data, follow the steps:

1. In the **Full Menu Version** sheet, copy the sets names.

2. Open the **Sets** sheet.

3. In the **Set Name** cells, enter the copied sets names.

4. In the **Min** and **Max** cells, enter the minimum and maximum number of ingredients that the customer can choose:

   o If the customer can choose nothing, the minimum quantity must be set to 0.

   o If the customer can choose an infinite number of ingredients, the maximum quantity must be set to 0.

Set Name	Min	Max	Ingredient Name	Q-ty	Max. Qty	Price 0+	Price 1+	Price 2+
Burger Add-ons	0	0				$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
Add Cheese	0	1				$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -

Enter the minimum and maximum number of ingredients that the customer can choose.

5. In the **Ingredient Name** cells, enter the names of ingredients that you want to add to the set.

Set Name	Min	Max	Ingredient Name	Q-ty	Max. Qty	Price 0+	Price 1+	Price 2+
Burger Add-ons	0	0	Tomatoes			$ -	$ -	$ -
			Lettuce			$ -	$ -	$ -
			Onions			$ -	$ -	$ -
			Pickles			$ -	$ -	$ -
			Cucumbers			$ -	$ -	$ -
			Green Peppers			$ -	$ -	$ -
			Grilled Red Peppers			$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
Add Cheese	0	1	American Cheese			$ -	$ -	$ -
			Cheddar Cheese			$ -	$ -	$ -
			Swiss Cheese			$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -

Enter the ingredients that you want to add to the set

6. In the **Q-ty** cells, enter the amount of ingredients in the set.

Set Name	Min	Max	Ingredient Name	Q-ty	Max. Qty	Price 0+	Price 1+	Price 2+
Burger Add-ons	0	0	Tomatoes	1		$ -	$ -	$ -
			Lettuce	1		$ -	$ -	$ -
			Onions	1		$ -	$ -	$ -
			Pickles	1		$ -	$ -	$ -
			Cucumbers	1		$ -	$ -	$ -
			Green Peppers	1		$ -	$ -	$ -
			Grilled Red Peppers	1		$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
Add Cheese	0	1	American Cheese	2		$ -	$ -	$ -
			Cheddar Cheese	2		$ -	$ -	$ -
			Swiss Cheese	2		$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -

Enter the amount of ingredients in the set

7. In the **Max. Q-ty** cells, enter the maximum amount for each ingredient. If the customer can choose an infinite amount of ingredients, the maximum number must be set to 0.

Set Name	Min	Max	Ingredient Name	Q-ty	Max. Qty	Price 0+	Price 1+	Price 2+
Burger Add-ons	0	0	Tomatoes	1	0	$ -	$ -	$ -
			Lettuce	1	0	$ -	$ -	$ -
			Onions	1	0	$ -	$ -	$ -
			Pickles	1	0	$ -	$ -	$ -
			Cucumbers	1	0	$ -	$ -	$ -
			Green Peppers	1	0	$ -	$ -	$ -
			Grilled Red Peppers	1	0	$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
Add Cheese	0	1	American Cheese	2	1	$ -	$ -	$ -
			Cheddar Cheese	2	1	$ -	$ -	$ -
			Swiss Cheese	2	1	$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -

Enter the maximum amount of ingredients that the customer can choose

8. In the **Price N+** cells, enter the price for each ingredient.

   If the first portion is for free, enter the price in the **Price 2+** cell. If the first two portions are for free, enter the price in the **Price 3+** cells and so on.

Set Name	Min	Max	Ingredient Name	Q-ty	Max. Qty	Price 0+	Price 1+	Price 2+
Burger Add-ons	0	0	Tomatoes	1	0	$ -	$ -	$ 0.20
			Lettuce	1	0	$ -	$ -	$ 0.20
			Onions	1	0	$ -	$ -	$ 0.20
			Pickles	1	0	$ -	$ -	$ 0.20
			Cucumbers	1	0	$ -	$ -	$ 0.20
			Green Peppers	1	0	$ -	$ -	$ 0.20
			Grilled Red Peppers	1	0	$ -	$ -	$ 0.20
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
Add Cheese	0	1	American Cheese	2	1	$ 0.40	$ -	$ -
			Cheddar Cheese	2	1	$ 0.45	$ -	$ -
			Swiss Cheese	2	1	$ 0.50	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -

Enter the price for each ingredient

PB Items Summary

To fill the PB Items Summary data, follow the steps:

1. In the **Full Menu Version** and **Sets** sheets, copy the ingredients names.

2. Open the **PB Items Summary** sheet.

3. In the **Ingredients** cells, enter the copied ingredients names.

Set Name	Min	Max	Ingredient Name	Q-ty	Max. Qty	Price 0+	Price 1+	Price 2+
Burger Add-ons	0	0	Tomatoes	1	0	$ -	$ -	$ 0.20
			Lettuce	1	0	$ -	$ -	$ 0.20
			Onions	1	0	$ -	$ -	$ 0.20
			Pickles	1	0	$ -	$ -	$ 0.20
			Cucumbers	1	0	$ -	$ -	$ 0.20
			Green Peppers	1	0	$ -	$ -	$ 0.20
			Grilled Red Peppers	1	0	$ -	$ -	$ 0.20
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
Add Cheese	0	1	American Cheese	2	1	$ 0.40	$ -	$ -
			Cheddar Cheese	2	1	$ 0.45	$ -	$ -
			Cheddar Cheese	2	1	$ 0.50	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -
						$ -	$ -	$ -

#	Ingredients	PLU	Measure Unit	Measure Type	Price Book Item	Category	Department	Unit in Case	Case Qty
1	Hamburger Bun								
2	Hamburger Patty								
3	Tomatoes								
4	Lettuce								
5	Onions								
6	Pickles								
7	Burger Sauce								
8	Tomatoes								
9	Lettuce								
10	Onions								
11	Pickles								
12	Cucumbers								
13	Green Peppers								
14	Grilled Red Peppers								
15	American Cheese								
16	Cheddar Cheese								
17	Swiss Cheese								
18									

Copy the ingredients names and insert them to the **Ingredients** cells in the **PB Items Summary** sheet

4. In the **PLU** cells, enter the ingredients PLUs.

#	Ingredients	PLU	Measure Unit	Measure Type	Price Book Item	Category	Department	Unit in Case	Case Qty
1	Hamburger Bun	2000							
2	Hamburger Patty	2001							
3	Tomatoes	2002							
4	Lettuce	2003							
5	Onions	2004							
6	Pickles	2005							
7	Burger Sauce	2006							
8	Cucumbers	2007							
9	Green Peppers	2008							
10	Grilled Red Peppers	2009							
11	American Cheese	2010							
12	Cheddar Cheese	2011							
13	Swiss Cheese	2012							
14									

Enter the ingredients PLUs

5. In the **Measure Unit** cells, enter the measurement units for the ingredients.

#	Ingredients	PLU	Measure Unit	Measure Type	Price Book Item	Category	Department	Unit in Case	Case Qty
1	Hamburger Bun	2000	piece						
2	Hamburger Patty	2001	piece						
3	Tomatoes	2002	oz						
4	Lettuce	2003	oz						
5	Onions	2004	oz						
6	Pickles	2005	oz						
7	Burger Sauce	2006	oz						
8	Cucumbers	2007	oz						
9	Green Peppers	2008	oz						
10	Grilled Red Peppers	2009	oz						
11	American Cheese	2010	oz						
12	Cheddar Cheese	2011	oz						
13	Swiss Cheese	2012	oz						

Enter the ingredients measurement units

6. In the **Category** and **Department** cells, enter the category and department for ingredients.

Typically, the *100 QwickServe* department and category are used.

#	Ingredients	PLU	Measure Unit	Measure Type	Price Book Item	Category	Department	Unit in Case	Case Qty
1	Hamburger Bun	2000	piece			100 Qwickserve	100 Qwickserve		
2	Hamburger Patty	2001	piece			100 Qwickserve	100 Qwickserve		
3	Tomatoes	2002	oz			100 Qwickserve	100 Qwickserve		
4	Lettuce	2003	oz			100 Qwickserve	100 Qwickserve		
5	Onions	2004	oz			100 Qwickserve	100 Qwickserve		
6	Pickles	2005	oz		Enter the category and	100 Qwickserve	100 Qwickserve		
7	Burger Sauce	2006	oz		department for the	100 Qwickserve	100 Qwickserve		
8	Cucumbers	2007	oz		ingredients	100 Qwickserve	100 Qwickserve		
9	Green Peppers	2008	oz			100 Qwickserve	100 Qwickserve		
10	Grilled Red Peppers	2009	oz			100 Qwickserve	100 Qwickserve		
11	American Cheese	2010	oz			100 Qwickserve	100 Qwickserve		
12	Cheddar Cheese	2011	oz			100 Qwickserve	100 Qwickserve		
13	Swiss Cheese	2012	oz			100 Qwickserve	100 Qwickserve		

ⓘ If you do not need recipe costing, do not read the following information. If recipe costing is necessary, please follow the next steps.

7. In the **Price Book Item** cells, enter the names of the Price Book items matching the ingredients.

ⓘ You can only enter information about items existing in the Price Book.
Please pay attention that the measurement units of the Price Book item and measurement unit of the ingredient must be the same.

#	Ingredients	PLU	Measure Unit	Price Book Item	Category	Department	Unit in Case	Package Cost, USD
1	Hamburger Bun	2000	piece	Hamburger Bun	100 Qwickserve	100 Qwickserve		
2	Hamburger Patty	2001	piece	Hamburger Patty	100 Qwickserve	100 Qwickserve		
3	Tomatoes	2002	oz	Tomatoes	100 Qwickserve	100 Qwickserve		
4	Lettuce	2003	oz	Lettuce	100 Qwickserve	100 Qwickserve		
5	Onions	2004	oz	Onions	100 Qwickserve	100 Qwickserve		
6	Pickles	2005	oz	Pickles	100 Qwickserve	100 Qwickserve		
7	Burger Sauce	2006	oz	Burger Sauce	100 Qwickserve	100 Qwickserve	Enter the Price Book	
8	Cucumbers	2007	oz	Cucumbers	100 Qwickserve	100 Qwickserve	items for the	
9	Green Peppers	2008	oz	Green Peppers	100 Qwickserve	100 Qwickserve	ingredients	
10	Grilled Red Peppers	2009	oz	Grilled Red Peppers	100 Qwickserve	100 Qwickserve		
11	American Cheese	2010	oz	American Cheese	100 Qwickserve	100 Qwickserve		
12	Cheddar Cheese	2011	oz	Cheddar Cheese	100 Qwickserve	100 Qwickserve		
13	Swiss Cheese	2012	oz	Swiss Cheese	100 Qwickserve	100 Qwickserve		
14								

8. In the **Unit in Case** cells, enter the number of units in case for the ingredients.

#	Ingredients	PLU	Measure Unit	Price Book Item	Category	Department	Unit in Case	Package Cost, USD
1	Hamburger Bun	2000	piece	Hamburger Bun	100 Qwickserve	100 Qwickserve	100	
2	Hamburger Patty	2001	piece	Hamburger Patty	100 Qwickserve	100 Qwickserve	100	
3	Tomatoes	2002	oz	Tomatoes	100 Qwickserve	100 Qwickserve	100	
4	Lettuce	2003	oz	Lettuce	100 Qwickserve	100 Qwickserve	100	
5	Onions	2004	oz	Onions	100 Qwickserve	100 Qwickserve	100	
6	Pickles	2005	oz	Pickles	100 Qwickserve	100 Qwickserve	100	
7	Burger Sauce	2006	oz	Burger Sauce	100 Qwickserve	100 Qwickserve	100	
8	Cucumbers	2007	oz	Cucumbers	100 Qwickserve	100 Qwickserve	100	Enter the number of
9	Green Peppers	2008	oz	Green Peppers	100 Qwickserve	100 Qwickserve	100	units in case for the
10	Grilled Red Peppers	2009	oz	Grilled Red Peppers	100 Qwickserve	100 Qwickserve	100	ingredients
11	American Cheese	2010	oz	American Cheese	100 Qwickserve	100 Qwickserve	100	
12	Cheddar Cheese	2011	oz	Cheddar Cheese	100 Qwickserve	100 Qwickserve	100	
13	Swiss Cheese	2012	oz	Swiss Cheese	100 Qwickserve	100 Qwickserve	100	

9. In the **Package Cost, USD** cells, enter the package cost. The unit cost will be calculated automatically.

#	Ingredients	PLU	Measure Unit	Price Book Item	Category	Department	Unit in Case	Package Cost, USD	Unit Cost, USD
1	Hamburger Bun	2000	piece	Hamburger Bun	100 Qwickserve	100 Qwickserve	100	$ 100.00	$ 1.00
2	Hamburger Patty	2001	piece	Hamburger Patty	100 Qwickserve	100 Qwickserve	100	$ 120.00	$ 1.20
3	Tomatoes	2002	oz	Tomatoes	100 Qwickserve	100 Qwickserve	100	$ 30.00	$ 0.30
4	Lettuce	2003	oz	Lettuce	100 Qwickserve	100 Qwickserve	100	$ 31.00	$ 0.31
5	Onions	2004	oz	Onions	100 Qwickserve	100 Qwickserve	100	$ 32.00	$ 0.32
6	Pickles	2005	oz	Pickles	100 Qwickserve	100 Qwickserve	100	$ 31.00	$ 0.31
7	Burger Sauce	2006	oz	Burger Sauce	100 Qwickserve	100 Qwickserve	100	$ 30.00	$ 0.30
8	Cucumbers	2007	oz	Cucumbers	100 Qwickserve	100 Qwickserve	100	$ 35.00	$ 0.35
9	Green Peppers	2008	oz	Green Peppers	100 Qwickserve	100 Qwickserve	100	$ 36.00	$ 0.36
10	Grilled Red Peppers	2009	oz	Grilled Red Peppers	100 Qwickserve	100 Qwickserve	100	$ 34.00	$ 0.34
11	American Cheese	2010	oz	American Cheese	100 Qwickserve	100 Qwickserve	100	$ 40.00	$ 0.40
12	Cheddar Cheese	2011	oz	Cheddar Cheese	100 Qwickserve	100 Qwickserve	100	$ 45.00	$ 0.45
13	Swiss Cheese	2012	oz	Swiss Cheese	100 Qwickserve	100 Qwickserve	100	$ 50.00	$ 0.50

Enter the package cost

The unit cost is calculated automatically

When the **PB Items Summary** sheet is finished, in the **Full Menu Version** sheet you will see that Measure Unit, Unit Cost, Total Amount and GPM are calculated automatically.

Categories	Recipe PLUs	Recipe Items	Recipe Retail Price	PLU	Ingredients for Recipe Items (base items)	Portion Size	Measure Unit	Optional ?	Hidden ?	Unit Cost, USD	Total Amount, USD	Sets Included (choices)	Add-ons
Burgers													
Category for burgers and sandwiches													
Steak Burgers	1000	Hamburger	**5.99**	2000	Hamburger Bun	1.00	piece		hidden	$ 1.00	$ 1.00	Burger Add-ons	Coke 20 oz.
				2001	Hamburger Patty	1.00	piece			$ 1.20	1.20	Add Cheese	
				2002	Tomatoes	2.00	oz	optional		$ 0.30	$ 0.60		
				2003	Lettuce	1.00	oz	optional		$ 0.31	0.31	Total amount	
				2004	Onions	1.00	oz	optional		$ 0.32	$ 0.32		
				2005	Pickles	1.00	oz	optional		$ 0.31	0.31		
				2006	Burger Sauce	2.00	oz	optional		$ 0.30	0.60		
			27.55%								$ 4.34		

GPM   Measurement unit   Unit cost   Recipe cost

QwickServe Categories and Subcategories

- Adding New Category
- Adding or Editing Category Description
- Editing Existing Category Name
- Activating/Deactivating Category
- Deleting Category
- Adding Image to Category
- Assigning/Unassigning Location to Category

Adding New Category

You can add a new category in the following ways:

- Add a new category to the menu from the menu top level.
- Add a new category to the menu category from the category.

Adding Category to Menu

To add a new category to the menu, follow the steps:

1. Double-click this menu, and then click the plus sign > **New Category**.
2. Enter the category name, and then press **ENTER** on your keyboard.
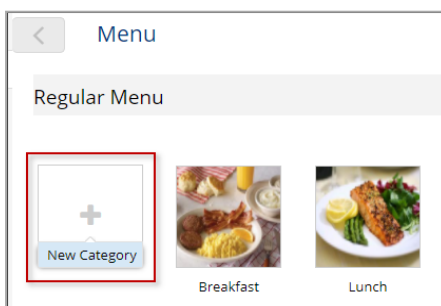
Adding Category to Existing Category

To add a new category to the existing menu category, follow the steps:

1. Double-click the menu, double-click the category, and then click the plus sign > **New Category**.

2. Enter the category name, and then press **ENTER** on your keyboard.
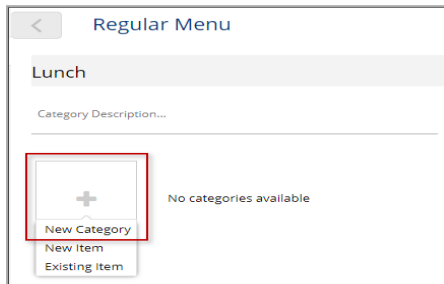
Adding or Editing Category Description

To add or edit the category description, double-click the category and then edit the **Category Description** field.

The category description is then displayed at the customer's interface in the QwickServe terminal.

Editing Existing Category Name

To rename the existing category, click the current category name and enter the new one.
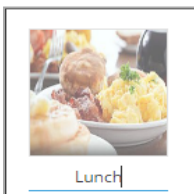
Activating/Deactivating Category

You can activate or deactivate a category for all stations on the account or for each station separately.

To activate or deactivate a category for one or several stations, follow the steps:

1. Click the category you want to activate or deactivate.
2. At the right of the category, click the activate/deactivate sign.
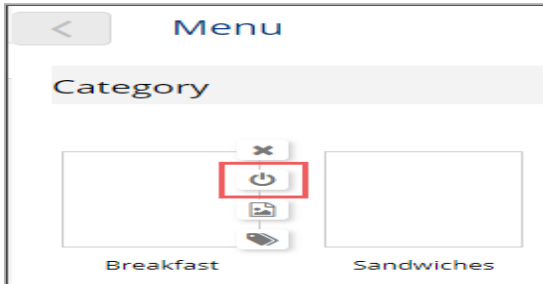
3. In the locations list opened for the category, select one or several locations.
4. In the **Active** column, click the **Active/Inactive** sign.
5. (Optional) In case several locations are selected, at the bottom right of the selected locations, click the **Update** button.
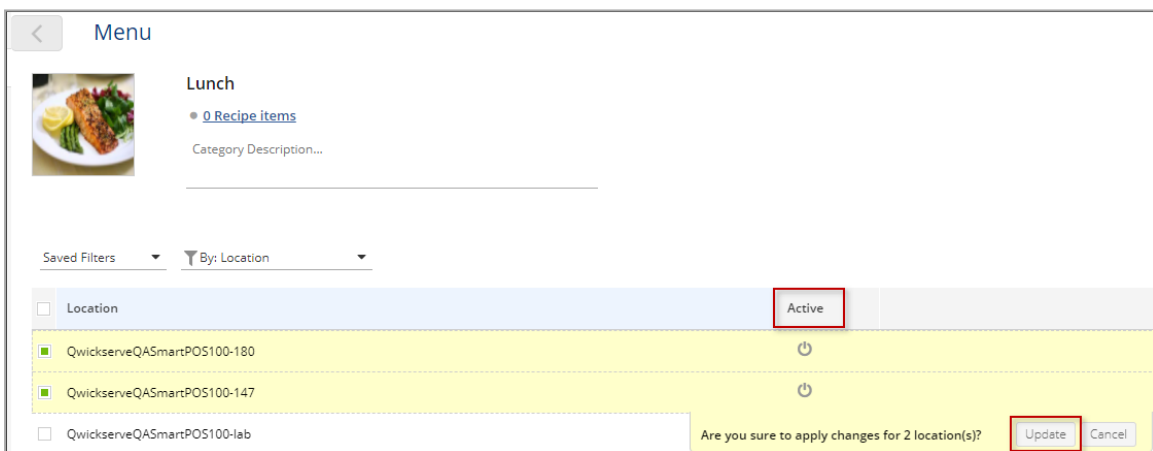
The activated category is available and deactivated category is not visible within the customer's interface in the QwickServe terminal.

Deleting Category

To delete the category, click it, click the cross sign, and then confirm the deletion by clicking **Yes**.
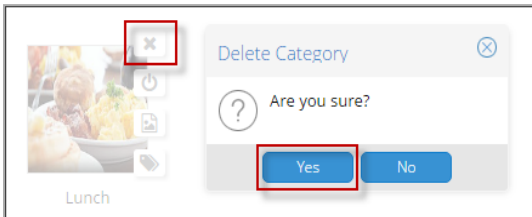
Adding Image to Category

To add an image to a category, follow the steps:

1. Click this category, and then click the icon for adding the image.

2. Set the category image. Do the following:

   o Click the space for the image.

   o At the right of the space for the image, click the image icon.

   o Select the image from the **Media Library** list. For more information on Media Library, see [Working with Media Library](#).

   o
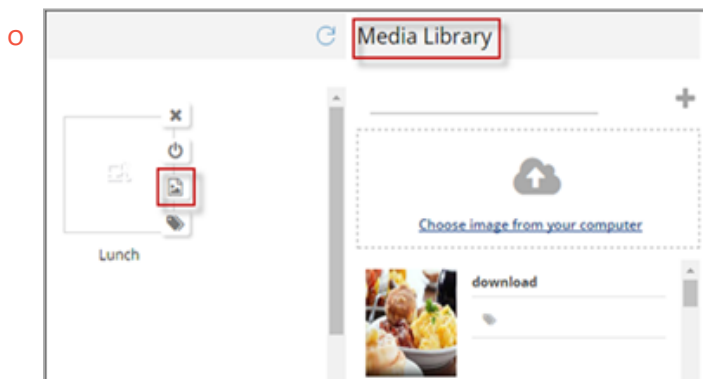
To edit or delete the category image, click this category, click the sign for adding the image, and then click **Change** or **Delete**.
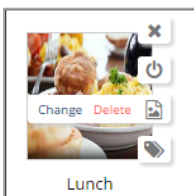
Once deleted, the image is technically unassigned from the category and is still available in the media library.

Assigning/Unassigning Location to Category

Locations feature is designed for addressing different groups of categories or recipe items between the KDUs or kitchen printers, which saves time and makes the kitchen processes more flexible. For more information, see QwickServe Locations.

QwickServe Items

- Adding New Regular Price Book Item
- Adding New Recipe Item
- Adding Existing Item
- Editing Item
- Activating/Deactivating Item
- Deleting Item from Category
- Deleting Item from System

Adding New Regular Price Book Item

To add a new regular Price Book item, follow the steps:

1. Open the category you want to create the item in, click the plus sign, and then click **Existing Item**.
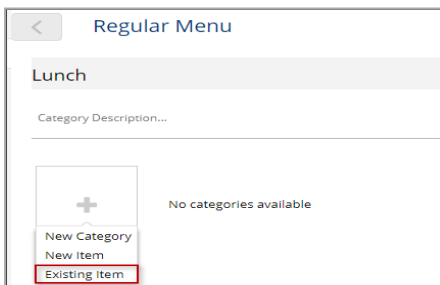
2. Click the plus sign, specify the item data, and then click **Save**.
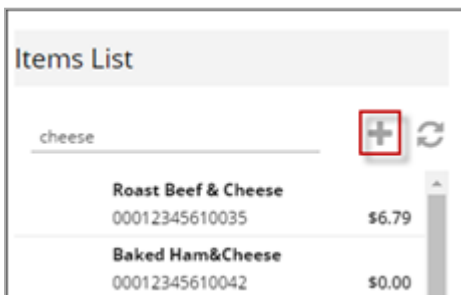
To have the income for the item reflected correctly on inventory, ensure that the Ingredient Method of Accounting option is selected for the item's CR Department and Category.

To check it, click **Price Book** > **CR Departments** or **Category**, select the CR Department or category from the list, and then click **View** or **Edit**.

> ⓘ Measure type of the Price Book item must match the linked QwickServe ingredients' measure type. For example, if your bulk cheese item's measure type is weight, you can set any weight related unit of measurement to the linked ingredients – pounds or kilos, ounces or grams, but not the volume measures.

For more information on how to add a new Price Book item, see the Items Setup section in the Petrosoft Cloud Help.

Adding New Recipe Item

To add a new recipe item, follow the steps:

1. Do one of the following:

    o Open the category you want to create the item in, click the plus sign, and then click **New Item**.
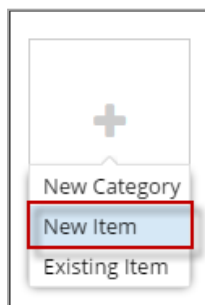
o Click the **Recipe Items** tab, and then click the plus sign.
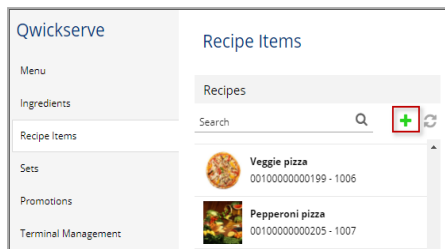
2. Specify the following basic information for the item:

o (Required) In the **PLU** field, enter PLU (Product Look-up Code) – up to 5 characters

o In the **New Item** field, enter the item name

o (Optional) In the **UPC** field, edit UPC (assigned automatically)

o In the **Department** list, select the department for the item

o In the **Category** list, select the category for the item

o Set the item's image. Do the following:

    a. Click the space for the image.

    b. At the right of the space for the image, click the image icon.

    c. Select the image from the **Media Library** list. For more information on Media Library, see Working with Media Library.

o Specify the price for one or several stations. Do the following:

    a. In the **Price for** list, select one or several stations.

    b. In the field at the right of the list, enter the price for the selected stations.

o Leave the **GPM** field blank as the GPM percentage is calculated automatically later on the basis of the difference between the recipe cost and the item price.

> ⓘ Recipe cost is a sum of all the recipe item constituent ingredients cost.

o (Optional) In case you need to change the item price and postpone this change, click the **Advanced Price Management** link and then follow the wizard instructions.

3. Set item's nutrition information. For details, see QwickServe Nutrition Facts.

4. Click **BASE** and then select the basic ingredients for the item. For details, see QwickServe Ingredients.

To reorder base ingredients in the item, drag and drop the ingredient and move it to another position.

> ⓘ Base ingredients are used for the recipe cost calculation. Once base ingredient is added or removed from recipe, the recipe cost is recalculated immediately in the Cost section. For more information on recipe cost calculation, see Recipe Item Cost.

o Selecting the **Optional** check-box, makes the base ingredient available for excluding from the recipe. In this example, you can exclude the ingredients with a green icon.

o Selecting the **Hidden** check-box, hides the selected base ingredients from the ordering interface.

The hidden base ingredients are not visible

5. Click **SETS** and then select the sets of ingredients to be used for the item. For details, see QwickServe Sets.

6. Click **ADD-ONS** and then select the add-ons to be offered to purchase with the item. For details, see QwickServe Add-ons.

7. (Optional) Click **ROUTING** and then select one or several locations the item is sent when ordered. For example, 'kitchen printer' or 'QwickServe Order Manager'. For details, see QwickServe Locations.

8. Click **DESCRIPTION** and then specify the following information:

   o Item description (up to 250 characters)

   o Item cooking instructions

9. Click **BASE** again to view the recipe cost, which is a sum of base ingredients' cost. Once you edit the base ingredient quantity, the recipe cost is automatically recalculated. For more information, see Recipe Item Cost.

Adding Existing Item

To add an existing item, follow the steps:

1. Open the category you want to add the item to.

2. Click the plus sign, and then click **Existing Item**.

3. Add the existing item from the corresponding list by clicking it.

4. (Optional) Use the search function to find the necessary item quickly.

Editing Item

To edit an item, follow the steps:

1. Do one of the following:
   o Regular Item: Find the regular item in the menu, and double-click it.
   o Recipe Item: Find the recipe item in the menu or under the **Recipe Items** tab, and then click the item.
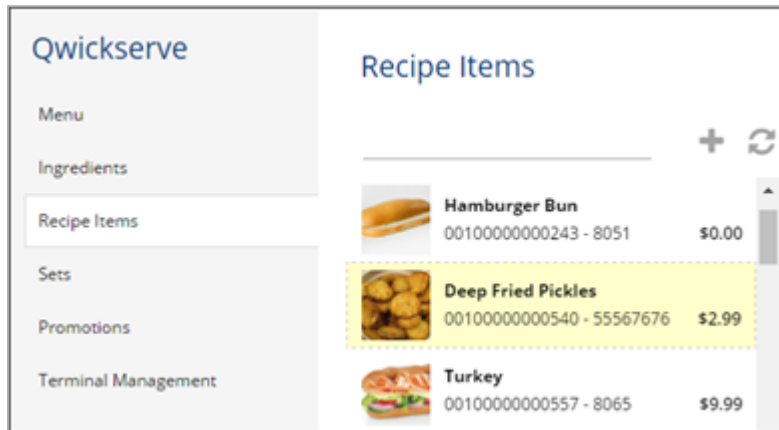
> One item can be assigned to several categories at a time, so once you edit it, the changes take place within all the categories the item is assigned to. Technically, it is the same item used in several categories.

2. Edit the following information by clicking it and entering the new one:
   o PLU (Product Look-up Code) – up to 5 characters
   o Item price
   o Item GPM
   o Item department
   o Item category
   o Item description (up to 250 characters)
   o Item cooking instructions
   o Item nutrition information.

3. Click the item image to change or delete it, if necessary.

4. Click **Base Ingredients**, and edit the base ingredients for the item by deleting existing ones or adding new ones. For more information on editing the ingredients, see QwickServe Ingredients.

5. Click **Sets**, and edit the sets of ingredients for the item by deleting the existing ones or adding new ones. For more information on editing the sets of ingredients, see QwickServe Sets.

6. Click **Add-ons**, and edit the add-ons to be offered to purchase with the item by deleting existing ones or adding new ones. For more information on editing the add-ons, see QwickServe Add-ons.

7. (Optional) Click **Locations**, and select one or several locations the item is sent to when ordered. For example "kitchen printer" or "QwickServe Order Manager". For more information, see QwickServe Locations.

Activating/Deactivating Item

You can activate or deactivate an item for all stations on the account or for each station separately.

1. To activate or deactivate an item for one or several stations, follow the steps:

2. Click the item you want to activate or deactivate.

3. At the right of the item, click the activate/deactivate sign.
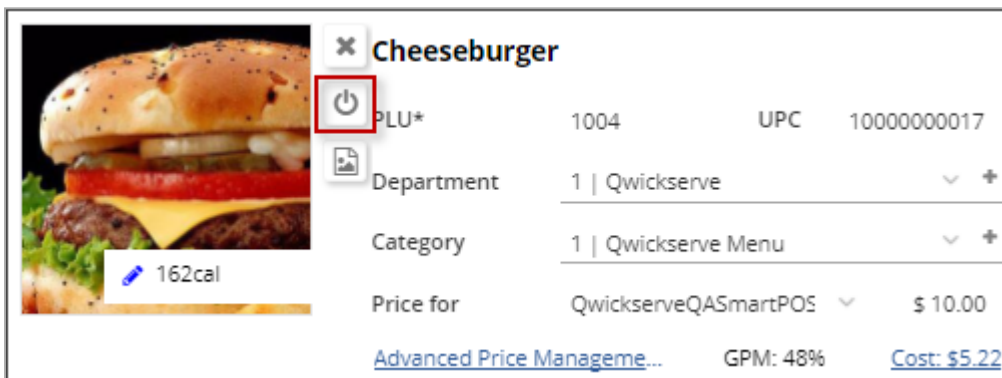
4. In the locations list opened for the item, select one or several stations.

5. In the **Active** column, click the **Active/Inactive** sign.

6. (Optional) In case several locations are selected, at the bottom right of the selected locations, click the **Updated** button.
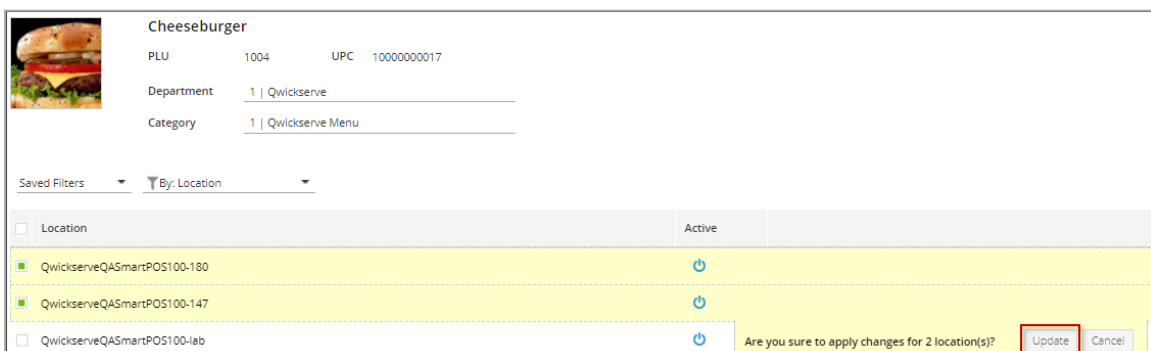
Deleting Item from Category

To delete an item from the category, click the corresponding sign, and then confirm the deletion.
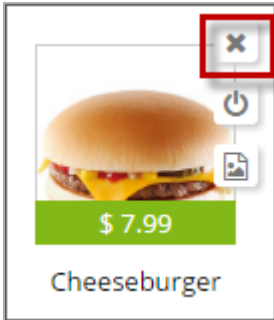
The item is deleted from the current category. If the item is assigned to other categories, it is left there. If you delete the item from all categories, it will still be present in the pool of unassigned items.

Deleting Item from System

To delete a recipe item, open it, and then click the delete sign.
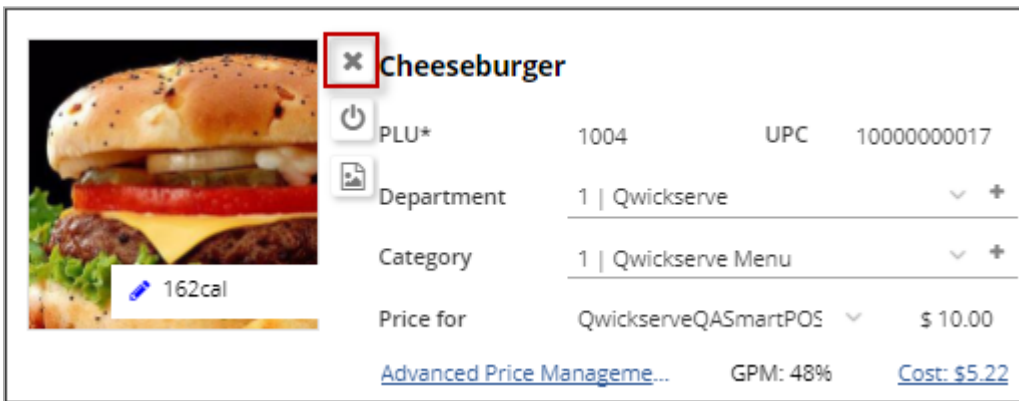
To delete a regular Price Book item, open it, and then click the **Delete** button for it.
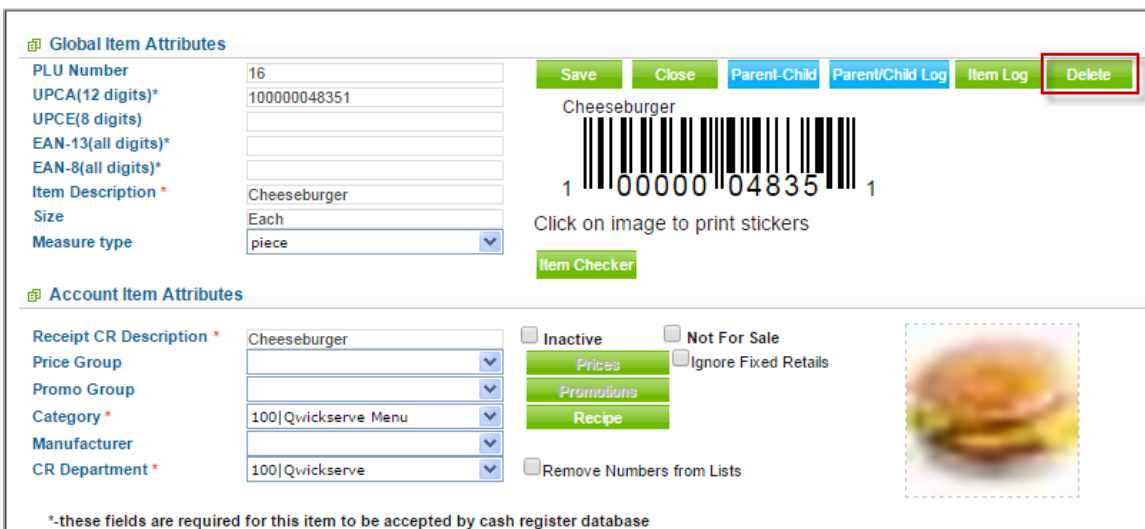
QwickServe Ingredients

- Creating New Ingredient
- Editing Ingredient
- Deleting Ingredient
- Linking/Unlinking Ingredients to Price Book Items

Creating New Ingredient

To create a new ingredient, follow the steps:

1. Click the **Ingredients** tab.
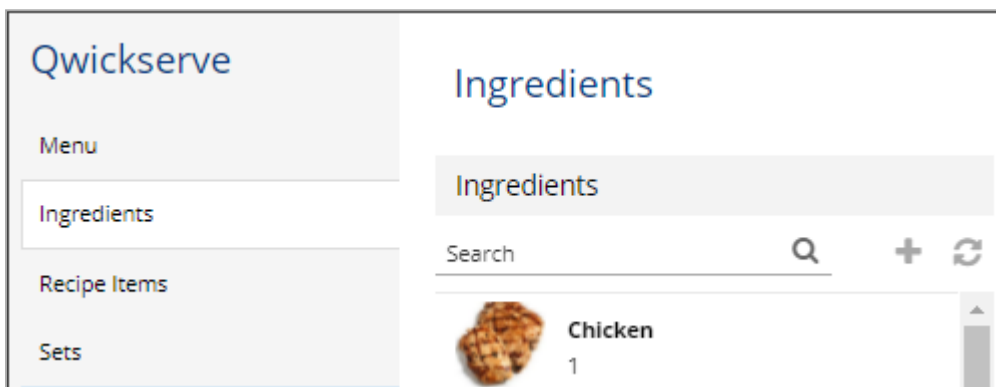
2. Click the sign for adding a new ingredient.

3. Enter the following information:

   o (Required) PLU (Product Look-up Code) – up to 5 characters

   o Ingredient name

   o Department

   o Category

4. Select the unit of measurement from the **Unit** list.
   In case the **Unit** field is left blank or contains value that is not from the list, the "Piece" measure type is assigned to the ingredient automatically.

   > ⓘ Once you link an ingredient to a PB item, this field will not be available for editing anymore to make sure the item and ingredient have the same measure type – weight, volume or unit/piece. For information in linking ingredients to bulk PB items, see Linking/Unlinking an Ingredient to the Price Book item.

5. Specify the item's nutrition information.

6. Set the ingredient's image. Do the following:

   o Click the space for the image.

   o At the right of the space for the image, click the image icon.

   o Select the image from the **Media Library** list. For more information on Media Library, see Working with Media Library.

7. Link the ingredient to the Price Book items. For more information, see Linking/Unlinking Ingredient to Price Book Item.

Editing Ingredient

To edit the ingredient, follow the steps:

1. Click the **Ingredients** tab.

2. Select the ingredient to edit from the list. Use the search (by name or PLU) function if necessary.

3. Click the ingredient you want to edit.

4. Edit the following information.

   o PLU (Price Look-up Code)

   o Ingredient name

- o Department

- o Category

- o Ingredient unit of measurement (e.g. grams)

- o Ingredient nutrition information.

- o Linked Price Book items. For details, see see Linking/Unlinking Ingredient to Price Book Item.

Deleting Ingredient

To delete an ingredient, follow the steps:

1. Click the **Ingredients** tab.

2. Select the ingredient to delete from the list. Use the search (by name or PLU) function if necessary.

3. Click the ingredient's image.

4. At the right of the image, click the cross sign.
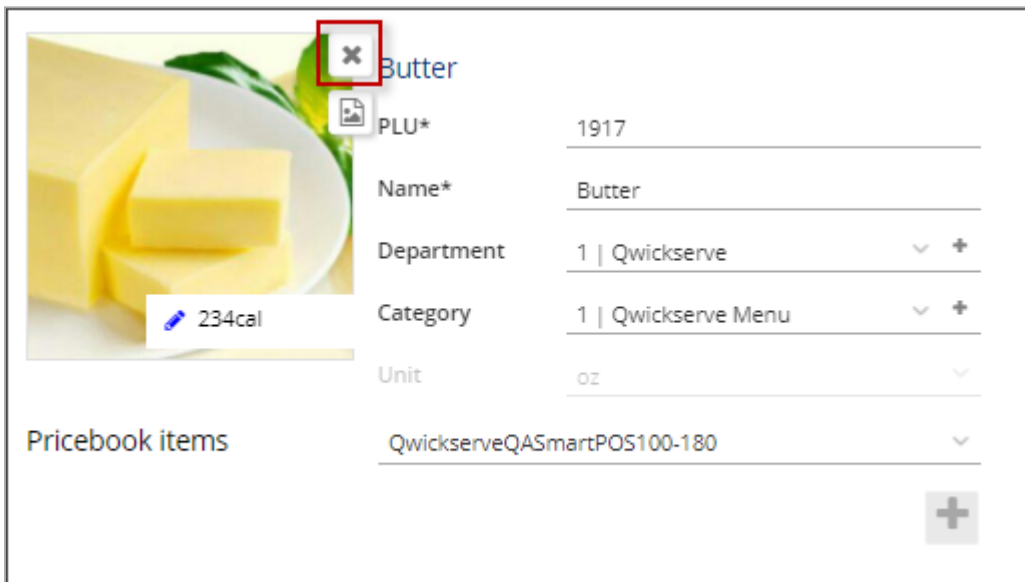
Linking/Unlinking Ingredient to Price Book Item

It is necessary to link ingredients to specific Price Book items for accurate recipe cost calculation.

Recipe items are constructed of ingredients, which, in turn, are linked to specific Price Book items and indicate, which portion of the bulk Price Book item must be used in the recipe.

The ingredients do not have the specific measure set. They only have the unit of measurement, and the ingredient's measure quantity/portion size is set when linking ingredients to sets or setting up the recipe base ingredients.
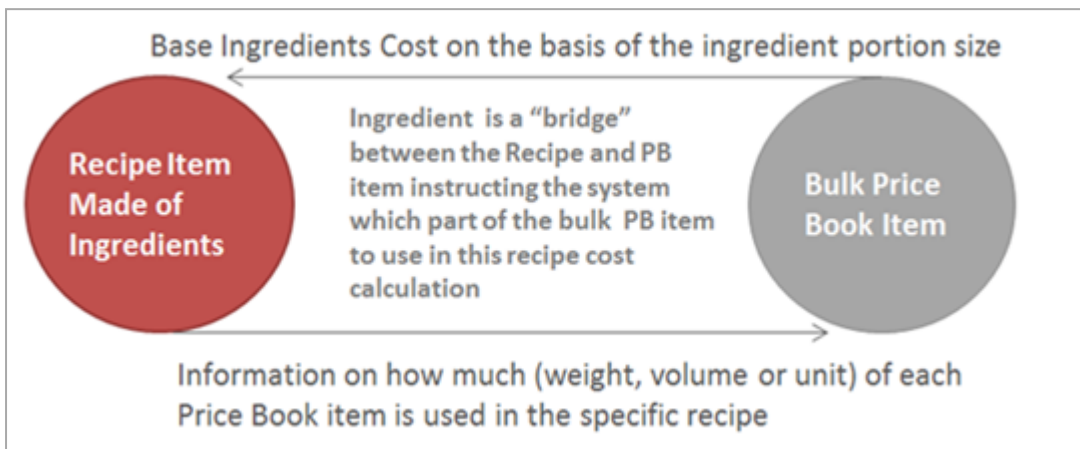
For more details on recipe costing calculation, see Recipe Item Cost.

You can link or unlink the ingredient to the Price Book items for one or several stations on the account.

To link/unlink an ingredient to the Price Book item, follow the steps:

1. Open the corresponding ingredient.

> ⓘ Linking ingredients to PB is necessary for the correct inventory calculation of the items that undergo the recipe costing method of calculation, that is, purchased in one form and sold in another.

2. In the stations list, select one or several stations for which you need to link or unlink the ingredient.

3. Do one of the following:

   o To link an ingredient to the Price Book item, click the plus sign, and then select the Price Book item from the list. Use search to find the item, if necessary.
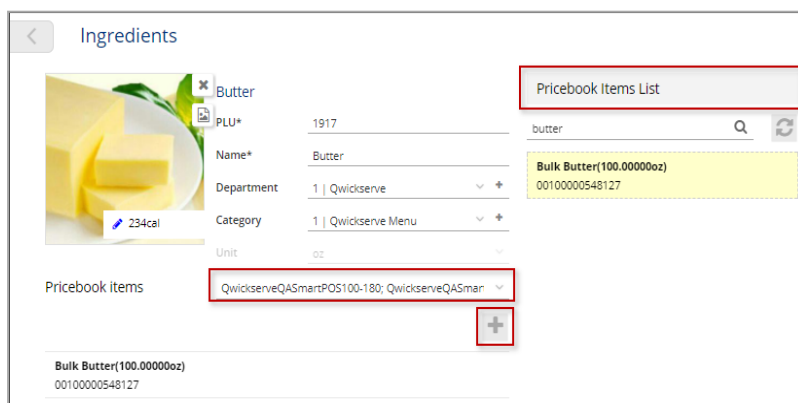
o To unlink the ingredient from the Price Book item, select the Price Book item and then click the cross sign.
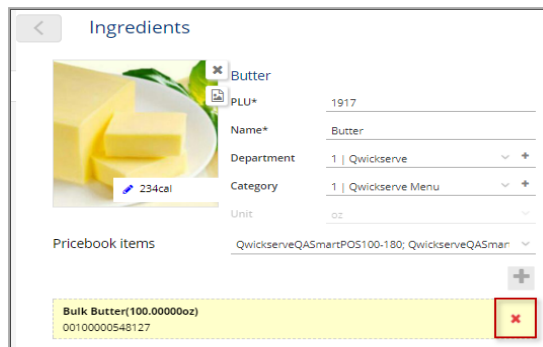
For more details on recipe costing calculation, see Recipe Item Cost.

It is assumed that the bulk Price Book items are already set up. It is also possible to create a new Price Book item in the middle of the process of linking ingredients. For more information, see Adding New Regular Price Book Item.

QwickServe Nutrition Facts

You can add nutrition information for recipe items and ingredients.

To add nutrition information, follow the steps:

1. Open recipe item or ingredient.

2. Click **Nutrition Facts**.

3. Enter the nutrition information.

4. (For recipe items only) Select the method of nutrition calculation:

   o **Automatic.** Nutrition facts for the recipe item are calculated automatically by the system – a sum of nutrition facts for each ingredient.

   o **Manual.** Nutrition facts for the recipe item are entered manually.

   o **Off.** Nutrition facts for the recipe item are not calculated. In this case the nutrition information is not displayed for an item in the ordering menu.

The number of item's calories, if any, is displayed on the item's image.

QwickServe Sets

All QwickServe sets are created on the account level and available for all stations on the account. However, you can configure the following settings of the sets on the station level:

- MIN and MAX numbers of ingredients
- Tier prices
- Ingredients list

You can perform the following operations with the sets of ingredients:

- Creating New Set
- Editing Set
- Deleting Set
- Assigning/Unassigning Ingredients

Creating New Set

To create a new set, follow the steps:

1. Click the **Sets** tab, and then click the icon for creating a new set.
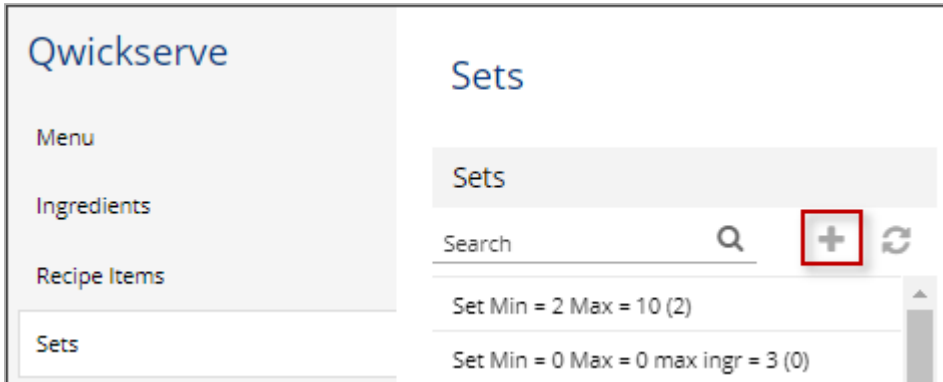
2. Enter the following information:

   o Set name

   o MIN. The minimal number of ingredients to be sold per one recipe item.

   o MAX. The maximum number of ingredients to be sold per one recipe item.

   > ⓘ By default, the minimal and maximum numbers are assigned to all locations on the account. Then, you can change them for a specific station, by selecting this station from the **Locations** list and changing the numbers.

   o

3. Select if you want to enable partitioning of the ingredients assigned to this set:

   o **Allow Whole.** Ingredient is sold as a whole. This option is selected by default.

   o **Allow Half.** Ingredient can be sold in halves.

   o **Allow Quarter.** Ingredient can be sold in quarters.

The partitioning is available for the user in the ordering menu.
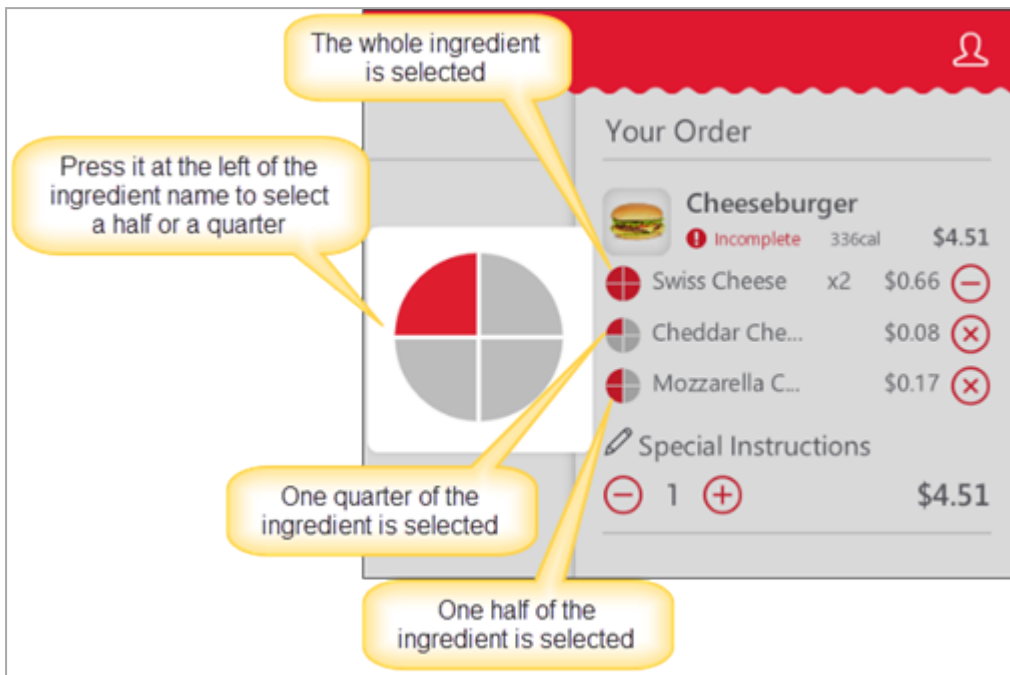
4. In **Tier Prices**, select the level of setting up the tier price ranges: **Set Level** or **Ingredients Level** and set the tier price ranges for the set, if the **Set Level** was selected.

5. Assign the ingredients to the set. For more information, see Assigning/Unassigning Ingredients. By default, the ingredients are assigned to all locations on the account. Then, you can change the set's ingredients for a specific station, by selecting it from the **Locations** list and reassigning ingredients.

6. Set the tier price ranges for each ingredient in the set, if the **Ingredients Level** was selected in **Tier Prices**. By default, the tier price ranges are set for all locations on the account. Then, you can change the tier price ranges for a specific station, by selecting it from the **Locations** list and setting the new price.

7. Enter the ingredient portion size and the maximum number (cannot be more than the MAX value for the whole set).

Editing Set

To edit a set, follow the steps:

1. Click the **Sets** tab, and then select the set to be edited from the list. Use search if necessary.

2. Open selected set by clicking it.

3. Edit the following information.

   o Set name

- o MIN. The minimal number of ingredients to be sold per one recipe item.
- o MAX. The maximum number of ingredients to be sold per one recipe item.
- o Partitioning options.
- o (Optional) Edit the tier price ranges for the set or its ingredients.
- o Edit the portion size and the maximum number of ingredients.

Deleting Set

To delete a set, follow the steps:

1. Click the **Sets** tab.
2. Select the set to be deleted from the list. Use search if necessary.
3. Click the delete sign.

Assigning/Unassigning Ingredients

By default, the ingredients are assigned to all stations on the account. Then, you can change the set's ingredients for a specific station, by selecting this station from the Locations list and reassigning the ingredients to the set.

To assign/unassign ingredients to the set, slick **Sets**, select the set you want to assign the ingredients to, and then do one of the following:

- To assign an ingredient to the set, click the add sign, and then select the ingredient from the list.
- To unassign the ingredient from the set, click the cross sign near the corresponding ingredient.
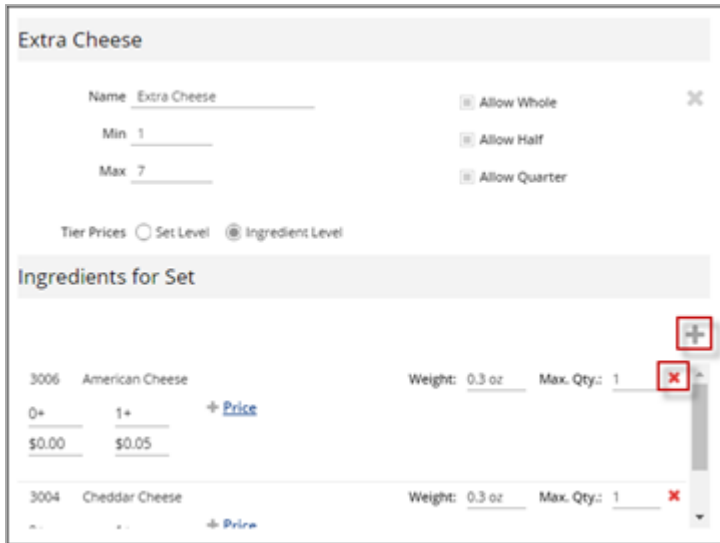
To reorder ingredients in the set, drag and drop the ingredient and move it to another position.

Tier Price Ranges

Tier prices are the price ranges to be applied to the whole set or to each ingredient in a set depending on the ingredients quantity.

For example, you can charge each additional portion of an ingredient different prices.

By default, tier prices are set for all station on the account. Then, you can edit tier prices for a specific station, by selecting it from the Locations list and setting new prices.

In the example below the Ingredient Level is selected and the following tier price ranges are applied to the ingredients of the Salad Dressings set:

- **Oil & Vinegar** – the 1st ingredient is free (0+), the 2nd and the 3rd ingredients cost 5 cents (1+), the 4th ingredient and more portions of this ingredient cost 6 cents (3+).
- **French** – the 1st and the 2nd ingredients are free (0+), the 3rd ingredient costs 6 cents (2+), the 4th

ingredient and more portions of this ingredient cost 7 cents (3+).

> ℹ️ If you want pricing for quarters to be activated, you must start price ranging with 0+ and continue setting the regular way.

In the following example, the Set Level is selected and all the ingredients have the same tier price ranges: the 1st ingredient is free (0+), the 2nd ingredient and more portions of the ingredient cost 5 cents (1+).

QwickServe Add-ons

Add-ons are managed for each station on the account.

To assign/unassign add-ons to the item, follow the steps:

1. Open the item you want.
2. Click **ADD-ONS** and then in the **Locations** list, select the station for which you want to assign or unassign the add-ons to the item.
3. Do one of the following:

o To assign an add-on to the item, select the add-on from the list. Use search if necessary.
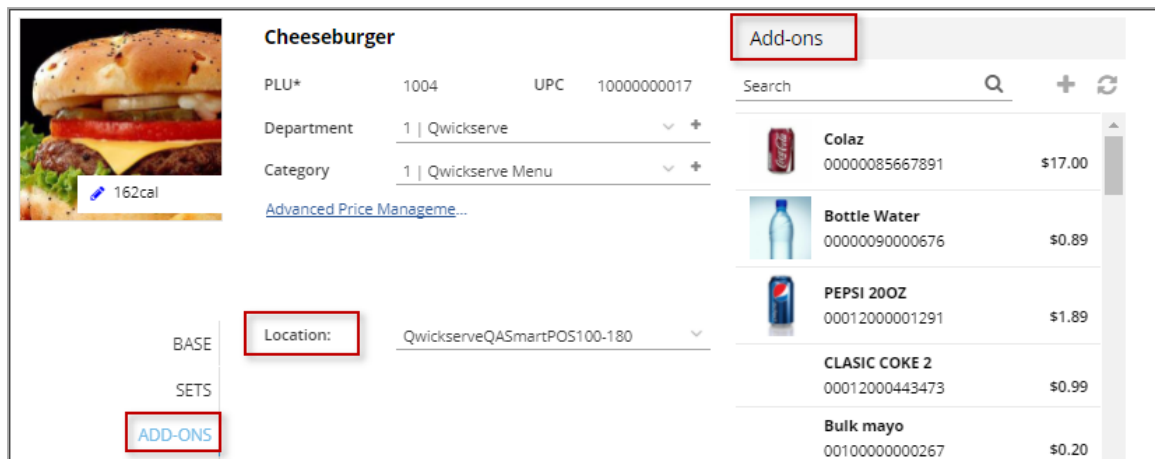
o To unassign the add-on from the item, hover over add-on, and then click the corresponding delete sign for the ingredient.
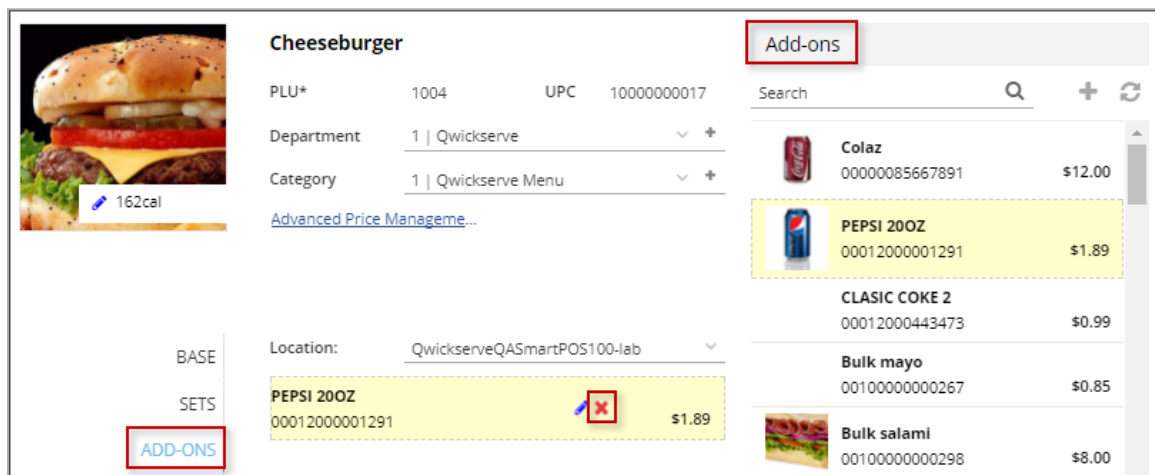
To reorder add-ons in the item, drag and drop the add-on and move it to another position.

The add-ons appear on finishing the made-to-order item construction at the food ordering menu.
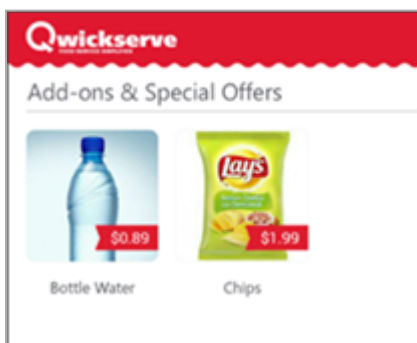
Creating QwickServe Promotion

QwickServe solutions supports for the following promotion types:

- Price Each Mix (Amount)

- Mix & Match (New Price)

- Price Modifier (New Price)

- Price Reduction (Buydown): This promotion is not displayed in the QwickServe Mobile, but discounts within this promotion still can be applied to the items.

To create a new QwickServe promotion:

1. Do one of the following:

    o In the main top menu, click **Price Book** > **Promotions**.
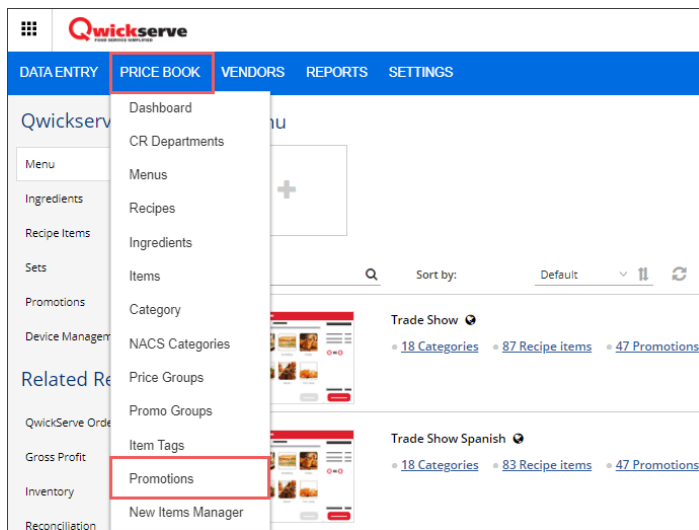
    o In the **QwickServe** right menu, click **Promotions**.
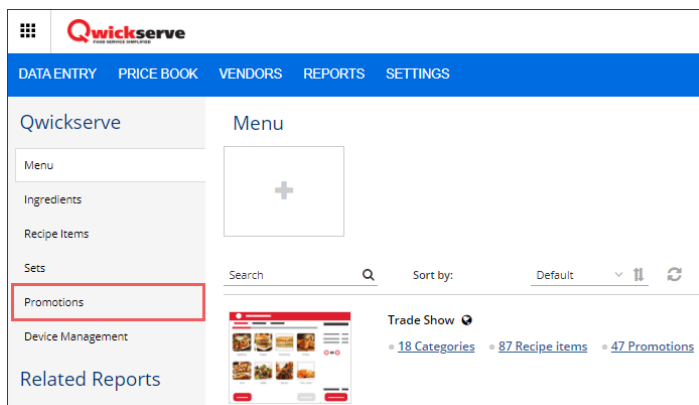
2. At the top left of the **Promotions** list, click **Add New**.
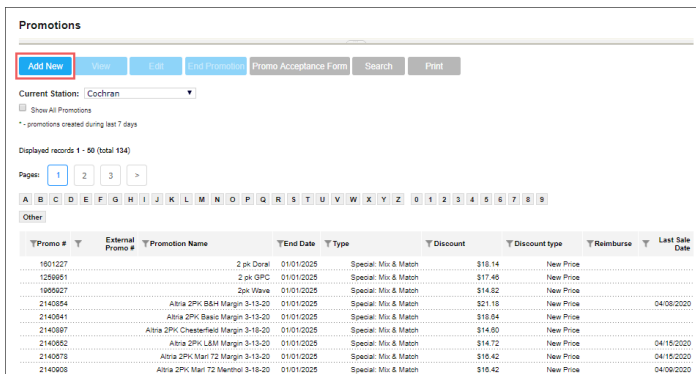
3. In the **Promotion** setup form, specify the promotion settings and click **Save**. For more information on how to set up the promotion settings, see Promotion Setup Form.Promotion Setup Form.

4. In the **How much** section, use **New Price (Special)** only.

QwickServe Locations

Routing feature is designed for addressing different groups of category or recipe items between the KDUs or kitchen printers, which saves time and makes the kitchen processes more flexible.

You can configure routing for each location on your account separately.

- Routing Workflow
- Creating New Location
- Deleting Location
- Assigning/Unassigning Locations to Items
- Assigning/Unassigning Locations to Categories

Routing Workflow

Step 1: Create a location on the cloud side.
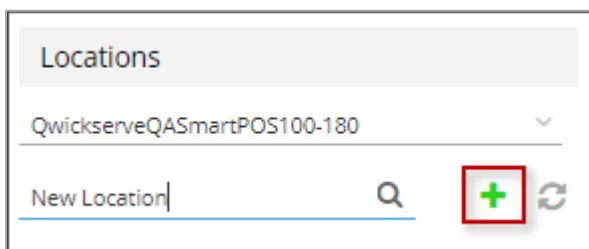
Step 2: Assign location to a recipe item.
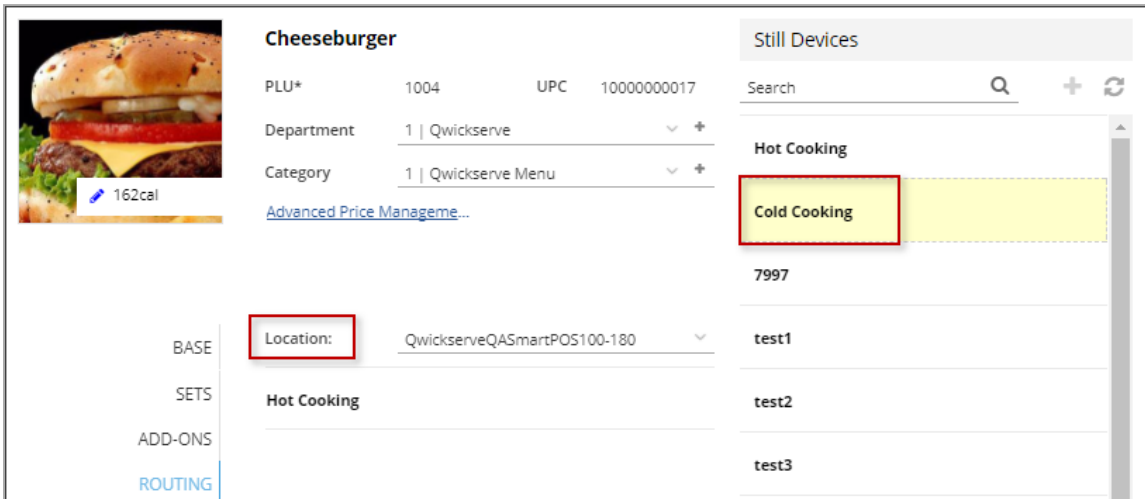
Step 3: Set up a device and add this location to the list of locations that can send orders to this device.
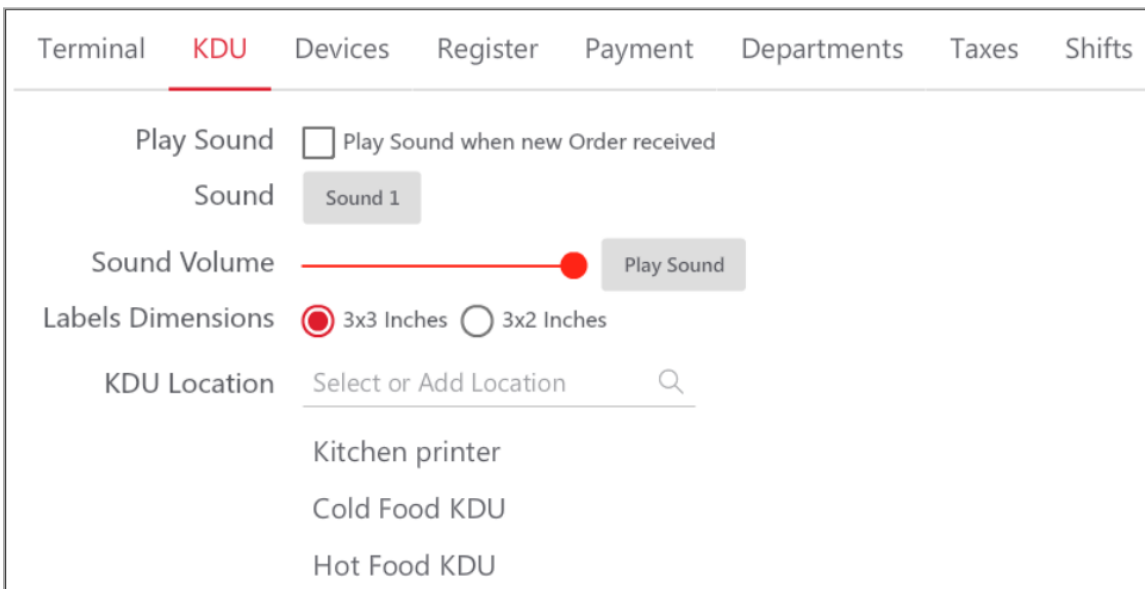
Result: Once placed, the category or recipe items within one order are sent to different KDUs, depending on the item and KDU locations.

For example, customer orders a salad and a pizza. The salad is assigned to the "Cold foods" location, the pizza – to the "Hot Foods". There is 1 KDU and 1 kitchen printer in the café. KDU is set up to receive cold food orders and kitchen printer – the hot food ones. So, this single order is split between KDU and printer.

Creating New Location

You can create a new location in the following ways:

- Working with Category
- Working with Recipe Item

Creating Location in Category Form

When location is created within a category, it automatically becomes available for all recipe items in this category.

To create a new location in the Category form, follow the steps:

1. Click the category for which you want to add a location.

2. At the right of the category, click the locations sign.
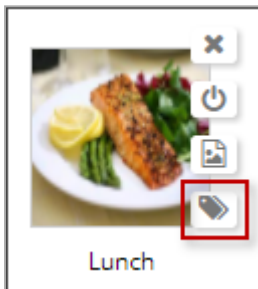
3. In the **Locations** list, select the station for which you want to add a location.

4. In the **Search** field, enter a new location name.

5. At the right of the **Search** field, click the plus sign.
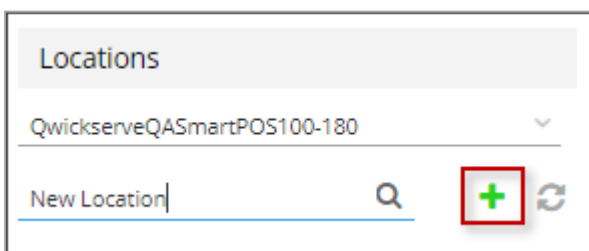
Creating Location in Recipe Item Form

To create a new location in the Recipe Item form, follow the steps:

1. In the **Recipe Items** list, select the recipe item.

2. In the Recipe Item form, click **ROUTING**.
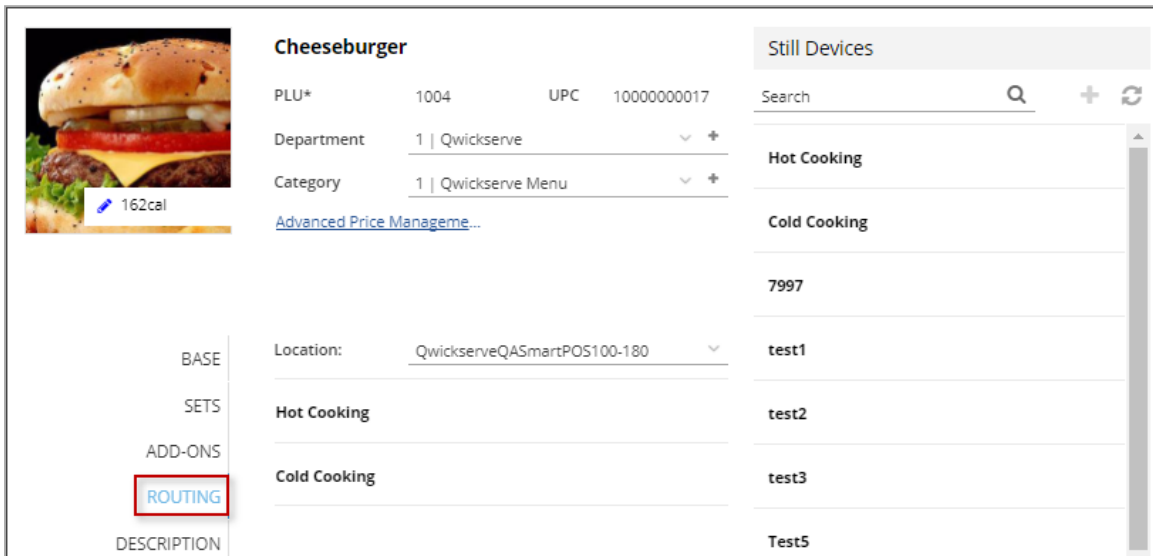
3. In the **Still Devices** list > the **Search** field, enter a new location name.

4. At the right of the **Search** filed, click the plus sign.

Deleting Location

To delete a location from the list of available locations, do one of the following:

- In case you are working with the category, in the **Locations** list, select the station, hover over a location, and then click the cross sign.
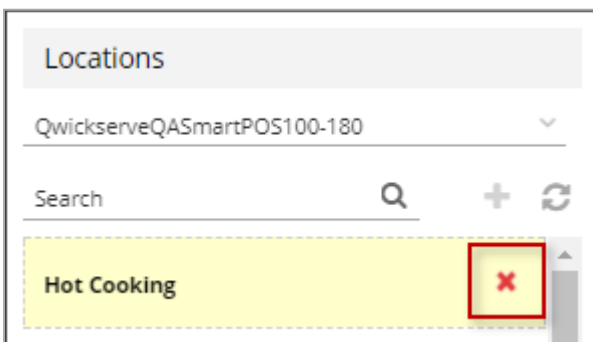
- In case you are working with the recipe item, in the **Still Devices** list, hover over a location, and then click the cross sign.
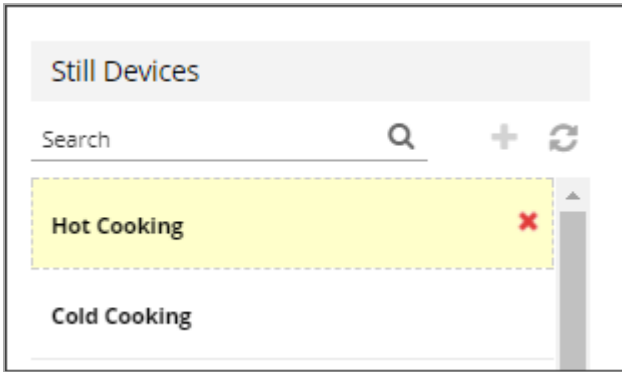
Assigning/Unassigning Locations to Items

To assign/unassign a location to the item, follow the steps:

1. Open any recipe item and then click **ROUTING**.

2. In the **Location** list, select the station, for which you want to assign or unassign the location to the item.

3. Do one of the following:

   o To assign a location, select it from the **Still Devices** list and double-click it.
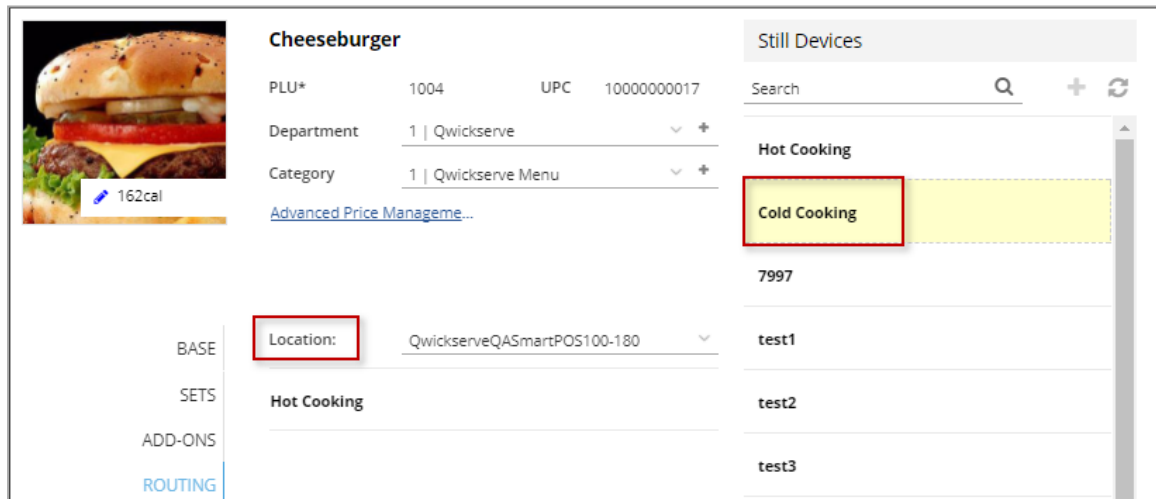
o To unassign a location, hover over it and click the cross sign.
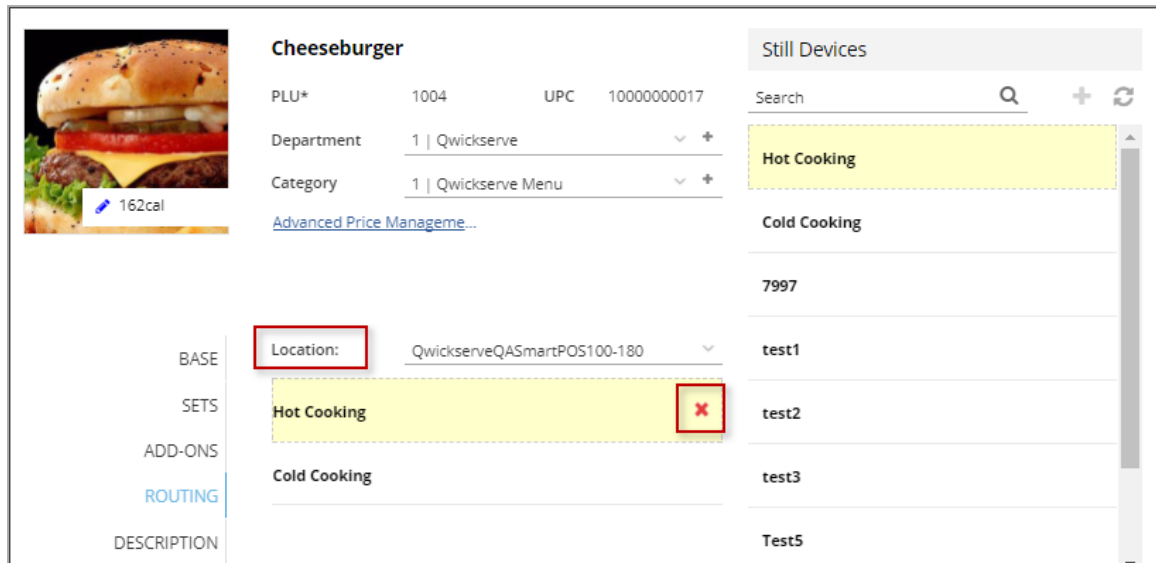
Assigning/Unassigning Locations to Categories

The feature is currently in progress.

Recipe Item Cost

The Recipe Item Cost section consists from the following subsections:

Recipe Item Cost Calculation

Recipe items cost is calculated as a sum of the base ingredients.

Each base ingredient is linked to one or several bulk Price Book items. The cost is based on the PB item cost and the part of the bulk item used for the recipe.
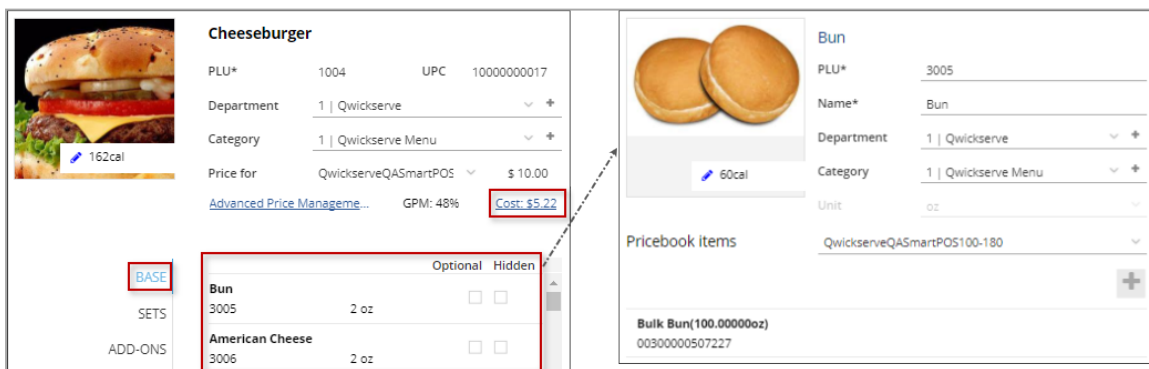
Once base ingredient is added or removed from recipe, the recipe cost is recalculated immediately in the Recipe Cost section.

> ⓘ If even one ingredient is missing a unit value, the recipe item cost will not calculate.

For example, you have configured the "Cheeseburger" recipe item containing the following base ingredients:

Base Ingredient		Bulk Item the Base Ingredient is linked to	
Name	Portion Size	Name	Cost and Measure Unit
Patty	0.2 lbs	"Ground Beef"	10 dollars for 2 lbs
Bun	1 unit/piece for bun	"Hamburger Patties"	6 dollars for a pack of 6

If this cheeseburger consists from these 2 ingredients only, it costs **2 dollars:**

- **1 dollar for 0.2 lbs of ground beef:** 2 lbs of ground beef cost 10 dollars, 0.2 lbs of ground beef cost 1 dollar (0.2*10/2 = 1).
- **1 dollar for 1 patty:** a pack of 6 pieces costs 6 dollars, one piece costs 1 dollar (1*6/6 = 1).

When ordering cheeseburger, customer may add sets and/or additional ingredients to it, what increases the total item cost.

For example, customer selected the following additional ingredients:

Base Ingredient		Bulk Item the Base Ingredient is linked to	
Name	Portion Size	Name	Cost and Measure Unit
Double cheddar cheese	0.1 lbs	"Cheddar Cheese"	100 dollars for 10 lbs
Mayo dressing	0.3 fluid ounces	"Mayo"	10 dollars for 33 fluid ounces

The additional ingredients cost **2 dollars and 10 cents:**

- **2 dollars for double cheddar cheese:** 10 lbs of cheddar cheese cost 100 dollars, 0.1 lbs cost 1 dollar (0.1*100/10); 2 portions cost 2 dollars (1*2).
- **10 cents for mayo dressing:** 33 fluid ounces cost 10 dollars, 0.3 fluid ounces cost 10 cents (0.3*10/33).

Total item cost = **4 dollars and 10 cents: 2 dollars** for the cheeseburger itself + **2 dollars and 10 cents** for additional ingredients.

Recipe Costing Workflow Overview

The following flow is recommended for correct recipe costing.

Step	Step description
Step 1: Create vendor	**Create a new Price Book vendor** you are planning to purchase the bulk recipe items from. For more details, see Creating Price Book Vendor.
Step 2: Create bulk Price Book item	**Create a new bulk Price Book item** and link this bulk item to the newly created vendor. For more details, see the Items Setup section in the Petrosoft Cloud Help.
Step 3: Create store invoice	**Create a store invoice to this vendor,** so the items would appear in the system inventory. For more details, see Creating Store Invoice Manually.
Step 4: Create ingredient	**Create an ingredient** and link it to the bulk Price Book item. For more details, see Creating a New Ingredient.
Step 5: Create recipe item	**Create a recipe item** using the ingredients linked to the bulk Price Book items. For more details, see Adding a New Recipe Item.

Creating Price Book Vendor

There are a lot of vendor settings available on both account and station levels. To run the recipe costing, you need to do the following:

- Mark vendor as active
- Enter the vendor's name
- Specify the vendor's type
- Select stations

To create a new QwickServe Price Book vendor, follow the steps:

1. Click **Vendors** > **Vendors List**.
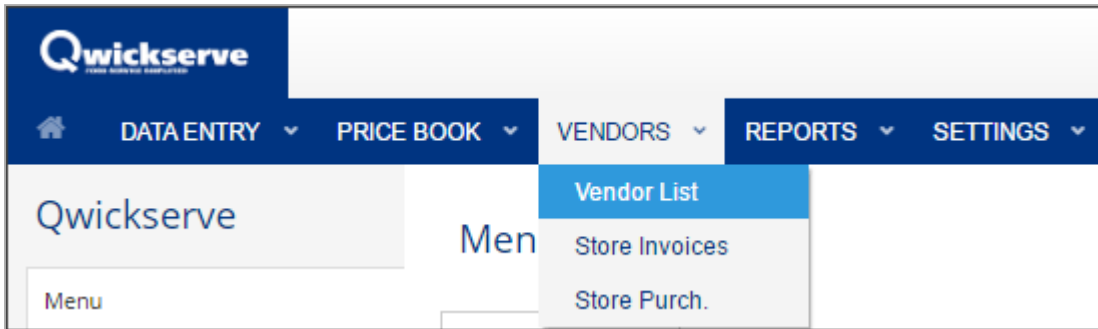
2. In the **Vendors** list, click **Add New** .
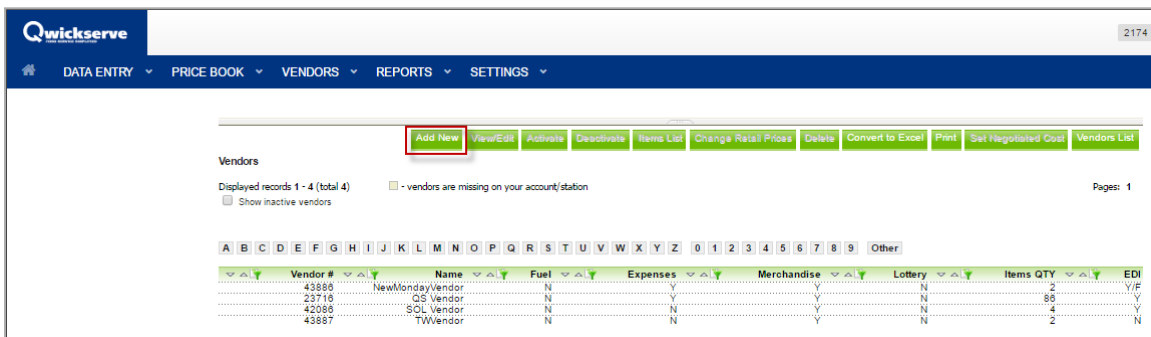
To complete the creation of new QwickServe vendor, see the Vendors section in the Petrosoft Cloud Help.

Calculating Gross Profit Margin (GPM)

Let's recollect all the steps that have been done to make the GPM calculation possible:

1. Create ingredients.

2. Create recipe items and select the base ingredients for them.

3. Create vendors.

4. Create price book items (bulk items) and link them to the proper ingredients.

5. Create the store invoices.

Once all the steps are done, you can see the GPM calculation for the recipe items.

The formula to GPM calculation is as follows:

GPM = (Retail Price - Cost Price)/Retail Price*100%

GPM will be recalculated as soon as you change one of the following parameters:

- Recipe price
- Add or remove the base ingredients
- Change the portion size of the base ingredients

Working with Media Library

Media library contains all QwickServe images.

With media library, you can perform the following operations:

- Store the menu images to reuse them for various items.
- Create image tags and tag the images for quick access.
- Add new images to the media library.

To add an image to the media library, click the plus sign and drag the image from your computer or show the path to location.

To delete the image from the media library, select this image, and then click the cross sign.

To create a new image tag, select the image, click the tag sign, enter the tag name, and then press **ENTER** on your keyboard.

You can assign already created tag to the image, selecting it from the list of tags, if any. You can assign as many tags to the image as you need.

To assign a tag to the item, click the tag icon, click the list icon, and then select the tag.

QwickServe Reports

You can view the QwickServe reports online using your C-Store Office account or directly from the QwickServe device.

To view the QwickServe reports online, using your C-Store Office account, log into C-Store Office and then do one of the following:

- Click **Reports** > **QwickServe**.
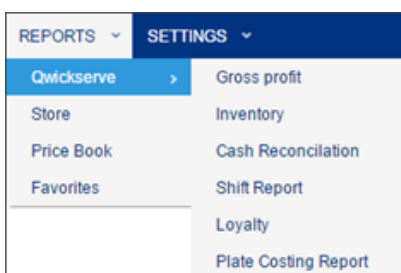
- Use the **Related Reports** section at the left QwickServe menu.
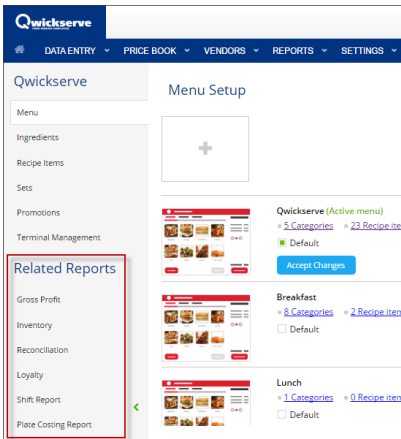
To view the QwickServe reports directly from the QwickServe device, at the top of the left menu, tap the reports icon .

You can view the following QwickServe reports:

QwickServe Order History Report

This section describes the specifics of accessing and interpreting the QwickServe Order History report.

Opening the Report

To open the QwickServe Order History report:

1. Log into C-Store Office.
2. At the top left of the main page, in the product switcher, select QwickServe.
   Result: QwickServe product main page opens.
3. At the top right of the main page, select the location.
4. In the left menu, go to **Related Reports** > **QwickServe Order History**.

Result: The report opens for the selected location.

Working with the Report

The QwickServe Order History report provides you the detailed information about the orders processed at QwickServe devices such as QwickServe KDU, QwickServe Self-Ordering Kiosk.

You may use this report during reconciliation to find out the reasons of data mismatch, if any.

While performing reconciliation, you may analyze the following data in the report:

- **Shift #**: The number of the shift closed by a cashier at the QwickServe device.
- **Location ID**: The identifier of the location in C-Store Office.
- **Location Name**: The name of the location.
- **Date and Time**: The date and time when the shift was closed by a cashier at the QwickServe device.
- **Order #**: The number of the QwickServe order. This number is assigned automatically at the QwickServe device once the order is created.
- **Order ID**: The order identifier.
- **Payment ID**: The payment identifier.

> 💡 The order and payment identifiers are used to find and analyze the payment transaction in your profile of the payment vendor, such as Braintree.

- **Payment Vendor**: In case the order is paid online via customer card, the payment vendor will display Braintree as currently QwickServe supports for online payments with Braintree.
- **Payment Status**: The order payment status which may indicate three possible values:
  - **Paid**

- o **Unpaid**

- o **Refunded**

- **Order Status**: The order processing status at the QwickServe device which may indicate the following values:

  - o **Completed**

  - o **Canceled**

  - o **Canceled not started**

  - o **Canceled but completed**

- **Sale, $**: The amount of sales within the order.

- **Taxes, $**: The amount of taxes within the order.

- **Total, $**: Total amount of the order.

> 💡 At the bottom right of the report table, the following totals are displayed for all orders in the report: **Sale, $**, **Taxes, $**, and **Total, $** columns.

To get the information about the order items, to the left of the order, click the plus icon.

> 💡 You can also generate the report for all locations on your account, to get the general statistic data. For details, see Filtering the Report Data.

Filtering the Report Data

By default the report is generated for the current day and for the location selected at the top right of the screen.

You can change the default report settings and generate it to match the criteria you need.

To generate the report with applied filters:

1. Below the report name, click the filter icon.
   Result: The Applied filters window opens.

2. In the **Applied filters** window:

    a. Select the filters you need. To the right of the selected filter, click **Done**. You can select any of the following filters:

- **Shift #**
- **Locations**
- **Period**
- **Time**
- **Order #**
- **Order ID**
- **Payment ID**
- **Payment Vendor**
- **Payment Status**
- **Order Status**
- **GTIN**
- **PLU**

    b. At the top right of the window, click **Apply**.
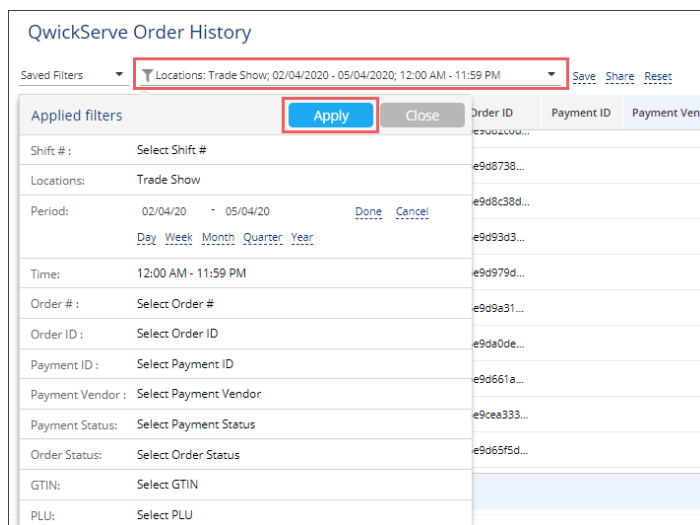
Result: The report is refreshed to display the filtered data.

Inventory Report

The Inventory report displays the following information:

- Shift ID number
- Shift number
- Date
- Time

- Opening amount

- Purchases amount

- Store usage amount

- Spoilage amount

- Ending amount

Inventory Report								
Shift Number	Shift ID #	Shift#	Date/Time	Open	Purchase	Usage	Spoilage	Ending
2	2681746	1	10/07/2016 07:13 10/07/2016 08:21	$14,056.69	n/a	$94.73	n/a	n/a
1	2681728	1	10/07/2016 04:54 10/07/2016 05:25	$6,580.36	$0.00	$115.02	$0.00	$6,465.34
4	2681370	1	10/05/2016 07:16 10/05/2016 07:47	$14,615.43	$0.00	$161.36	$0.00	$14,454.07

Reconciliation Report

The Reconciliation report displays the following information:

- Shift ID number

- Shift number

- Date

- Time

- CR quantity

- CR sales

- Order quantity

- Order $

- Var. quantity

- Var. sales

Reconciliation Report									
Shift Number	Shift ID #	Shift#	Date/Time	CR Qty	CR Sales	Order Qty	Order $	Var. Qty	Ver. Sales
2	2681746	1	10/07/2016 07:13 10/07/2016 08:21	61.00000	$349.64	61	$349.64	0.00000	$0.00
1	2681728	1	10/07/2016 04:54 10/07/2016 05:25	60.00000	$350.40	80	$350.40	0.00000	$0.00
4	2681370	1	10/05/2016 07:16 10/05/2016 07:47	68.00000	$385.75	68	$385.75	0.00000	$0.00

Loyalty Report

The Loyalty report displays the following information:

- Shift ID number

- Shift number

- Data and time

- Loyalty sales

- Loyalty amount

- Loyalty %

Shift Report

The Shift report displays the following information:

- Shift ID number
- Shift number
- Date and time
- Sales
- Payments
- Taxes
- Discounts

Plate Costing Report

The Plate Costing report displays the following information:

- Name
- QTY
- Begin Inventory
- Purchase
- End Inventory
- COGS
- Sales
- Food Cost
- Gross Profit

Localization and Multi-Language Support

QwickServe provides multi-language support for KDU and SSOT devices. Users working at the KDU or SSOT can switch between languages and view localized descriptions of menu items and user interface labels. Currently, the following languages are supported:

- English
- French
- German
- Russian
- Spanish

To configure language settings in QwickServe and enable users to switch between languages, you must perform the following activities:

1. Provide translations for menus objects.
2. Configure language settings at the KDU or SSOT.
3. (For users) Select the necessary language at the KDU or SSOT.

Providing Translations

To let QwickServe users view menus in different languages, you need to set up translations for menu objects: menu names themselves, categories, menu items, ingredients, set names and so on. Translations for menu objects can be configured on the C-Store Office side.

To provide translations for menu objects, follow the steps:

1. In C-Store Office, go to **Products Switcher** > **QwickServe**.
2. In the left menu, select the necessary object type: **Menu**, **Ingredients**, **Recipe Items** and so on.
3. Next to the object name, click the globe icon and define a translation for the object name:

   o At the top of the displayed window, click **Add**.

   o In the **Select language** field, select the target language.

   o In the field on the right, specify a translation for the menu object name.

o At the top of the window, click **Save** to save the changes.

Configuring Language Settings

In KDU or SSOT settings, you need to set the list of languages that must be available to QwickServe device users and select the default language.

To configure language settings at the KDU or SSOT, follow the steps:

1. At the KDU or SSOT, access the administrative interface.
2. In the left menu, press the settings icon.
3. At the top menu, press the **App** tab to open the application settings.
4. In the **Available languages** field, set up a list of languages that must be available to the device users.
5. In the **Default language** field, select a language to be displayed at the KDU or SSOT by default.
6. In the **Printer Documents Language** field, select a language that must be used for printed documents. If you select the **Interface** option, documents will be printed in the language that is currently selected for the application interface.
7. At the bottom of the view, click **Save** to save the changes.

Selecting Language at KDU or SSOT

After you set up translations for menu objects and configure language settings at the KDU or SSOT, the language list will be displayed at the top right corner of the KDU or SSOT screen. QwickServe users will be able to switch between languages at the device, and the menu items descriptions and user interface labels will be presented in the selected language.

To switch to another language at the KDU or SSOT, press the language icon and select the necessary language from the list.