

# Setting Up Your Dinerware Menu (version 3.4 and newer)

This document describes how to set up your own restaurant menu in Dinerware POS. This process can be lengthy, but you only need to do it once. After you have set up your menu, you can add to it or change it at any time in just minutes.

### Before you begin

We recommend that you **read this entire document** to better understand how the system works and how to use each type of menu category or type **before** you enter any menu information/items.

Before you begin setting up your menu, you should understand how Dinerware organizes a restaurant menu into working pieces. You will find the Menu functions organized as follows:

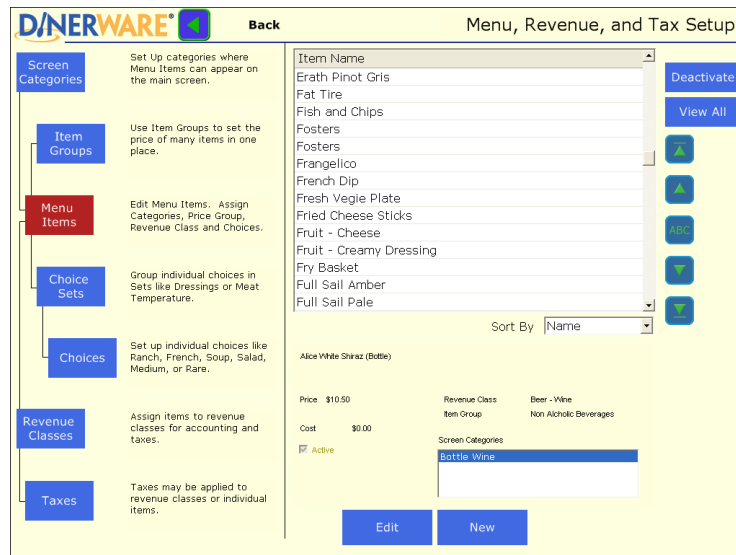
- **Screen Categories** — These determine how *Menu Items* display on the Order Entry screen
- **Item Groups** — These group together *Menu Items* for pricing, reporting, discounting and course firing
- **Menu Items** — These are each of the actual items that you offer from your restaurant menu
- **Choice Sets** — These group together *sets of choices* for ease of assigning them to individual *Menu Items*
- **Choices** — These are choices your customers have for specific individual *Menu Items*
- **Revenue Classes** — Use this function to assign *Menu Items* to appropriate *item groups* for tax and accounting purposes
- **Taxes** — Use this function to set the appropriate tax rates for both *revenue classes* and individual *Menu Items*

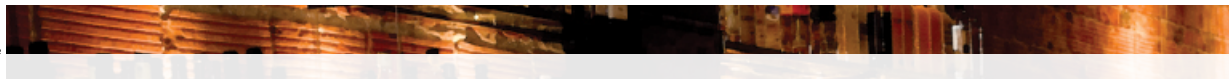
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In general, Dinerware recommends that you set up the elements of your Dinerware menu in the following order:

1. **Taxes**
2. **Revenue Classes**
3. **Screen Categories**
4. **Item Groups**
5. **Choice Sets**
6. **Choices**
7. **Menu Items**

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**1. Taxes**

- Taxes can be added/changed at any time during this process, BUT configuring them before you build the rest of your menu makes process more efficient, and prevents you from accidentally forgetting to add taxes later.

**2. Revenue Classes**

- Specific information is dependent on your location's tax rules and regulations.

**3. Screen Categories**

- For most restaurateurs, Screen Categories mimic or follow the different sections of the restaurant's menu.

**4. Item Groups**

- To begin the menu building process, most restaurateurs set up their Item Groups to mirror their Screen Categories.

**5. Choice Sets**

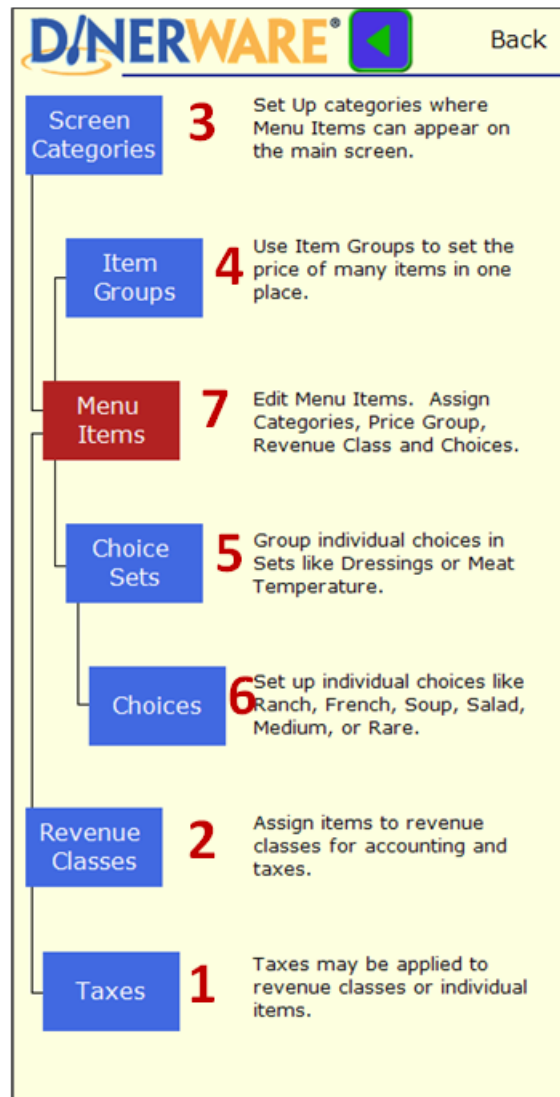
- Choice Sets represent the types of options for each Menu Item.

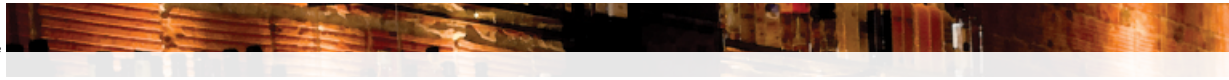
**6. Choices**

- Choices are the individual options/modifiers available for each Menu Item.

**7. Menu Items**

- Menu Items are the actual items that customers order from your menu.





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## Screen Categories

You can create any Screen Categories that make sense for your restaurant.

You may want to follow your printed menu as a guideline for creating Screen Categories. For example, if your printed menu has separate sections for Beverages, Appetizers, Sandwiches, Entrees, and Desserts, then these would make sense to create as Screen Categories.

If your business is an espresso bar and you sell many categories of beverages, then setting up Screen Categories for each beverage *type* might make more sense. For example, you might have espresso drinks, drip coffees, hot teas, and cold teas, all as individual Screen Categories.

After you create Screen Categories, you will create Item Groups, Revenue Classes, Choice Sets and Choices. Finally, you will create Menu Items, place each Menu Item into the appropriate Screen Category, Item Group and Revenue Class, then attach Choice Sets, and assign printers.

### Important

Be sure to create your Screen Categories, Item Groups, Revenue Classes, Choice Sets, and Choices **BEFORE** you create your Menu Items. It is important that you create your Menu Items last.

To create a new Screen Category:

1. From the Manager screen, select **Menu**.
2. Select **Screen Categories**.
3. Select **New**.
4. Enter the new Screen Category name.
5. Tap or click to place a checkmark in the **Active** box.
6. Tap or click **OK**.

## Item Groups

An Item Group is a collection of Menu Items with similar attributes. Using Item Groups makes it easy to work with groups of Menu Items for specific tasks such as price changing, sales tracking, applying discounts and course firing. You can also use Item Groups to filter specific data in Dinerware reports.

To set up an Item Group, you need to decide what Menu Items belong together. Examples of Item Groups might include Appetizers, Domestic Beers, Glass Wine, Bottle Wine, and Salads. To start with, you may want to create an item group that mirrors each screen category.

To create a new Item Group:

1. From the Manager screen, select **Menu**.
2. Select **Item Groups**.
3. Select **New**.
4. Type in a **name** for the Item Group, and a **price** for items in that group, and then tap **OK**.

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## Assigning Revenue Classes

Revenue Classes are groups of Menu Items with similar tax requirements, such as Food, Beer, Wine, Liquor, and Gift Certificates. Because tax rates vary from region to region, Dinerware does not ship with any specific tax information already configured. **You are responsible for knowledge of tax law in your locale.**

**Revenue Classes help provide you with a broad overview of your sales performance.**

Dinerware allows you assign Menu Items to specific Revenue Classes for tax and accounting purposes. Revenue Classes make it easier to track reportable stock.

Most Menu Items in the average restaurant fall into three Revenue Classes: Food, Beverage, and Alcohol. Because liquor is taxed in virtually any location, you may designate whether or not a Revenue Class contains liquor on the Edit Revenue Class screen.

### Important

Set up your Revenue Classes **before** you enter any Menu Items. When you create your Menu Items, you must assign each Menu Item to a Revenue Class.

To create a new revenue class:

1. From the Manager screen, select **Menu**.
2. Select **Revenue Class**.
3. Select **New**.
4. Type in a **name** for the Revenue Class (e.g., Alcohol).
5. If the Revenue Class contains *liquor*, tap or click to place a checkmark in the **Class is Liquor for tax purposes** box.
6. Tap or click **OK**.

## Defining Choices

Dinerware allows you to control which Choice options display when a user selects a Menu Item on the Order Entry screen. A *Choice* is the option or modifier that displays on the Order Entry screen when a Menu Item is selected (e.g. Ranch Dressing), while a *Choice Set* is the collection of Choices available to accompany any given Menu Item (e.g. Salad Dressings).

You use the Choices screen to set up individual Choices within Choice Sets. Choices are linked to specific Menu Items through Choice Sets. You may configure a Choice Set to be optional, or you may make it mandatory.

In order to add a Choice to any given Choice Set, you must first create the Choice using the Choices screen.

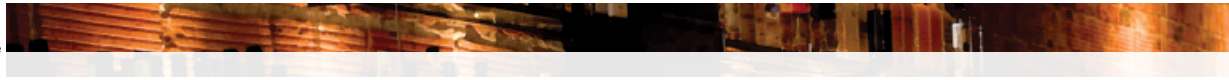
You may use the *Price Modifier* function if you wish to charge an additional cost to customers who add a particular Choice to a Menu Item. You can also track how much it costs your restaurant to offer a selected Choice with the *Choice Cost* function.

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When printed, Choices always print next to the Menu Items to which they are linked. In most restaurant settings, Choices will not be mapped to a printer, but the Choice will print automatically with the Menu Item to which it is linked.

If you want an additional slip to print at another printer (e.g. at the salad area printer and at the kitchen printer), you can use the Edit Choice screen.

## To add a new Choice to the list of possible Choices:

1. From the Manager screen, select **Menu**.
2. Select **Choices**.
3. Select **New**.
4. Enter information about the new Choice:
  - a. Name the Choice (e.g., "Gorgonzola")
  - b. Determine whether the new Choice will cost extra to order (optional).
  - c. Determine in which Choice Sets you want the Choice to display.
5. If necessary, select a printer (other than the printer assigned to the Menu Item), for choices such as side salads that may be prepared in a different location.
6. Tap or click **OK**.

## *What if my Choice comes with another Choice?*

Some Choices require Choices of their own. For example, an entrée Menu Item may come with a choice of soup or salad. If you select the salad Choice, then you should be asked to select what kind of dressing you want for the salad. In situations like this, you can easily link a primary Choice to a secondary Choice by using Choice Sets.

When you create the primary Choice, use the **Has these Sub-Choice Sets** function on the *Edit Choice* screen to select the secondary Choice Set you want to link to the primary Choice.

For example, the Roast Lamb Menu Item comes with a choice of either pumpkin soup or a spinach salad. The pumpkin soup and the spinach salad would both be created as Choices, and assigned to a "Side Dishes" Choice Set.

On the Roast Lamb's *Edit Menu Item* screen, you would select the "Side Dishes" Choice Set to offer these two side dishes as an option. Because the spinach salad Choice comes with a Choice of dressings (e.g., vinaigrette, sesame plum, or bleu cheese), you will need to create Choices for "Vinaigrette," "Sesame plum," and "Bleu cheese," and link these choices to a "Salad Dressings" Choice Set. Then, you may either create or edit the Spinach Salad Choice to come with the "Salad Dressings" Choice Set.

## To create a Choice with its own Choices:

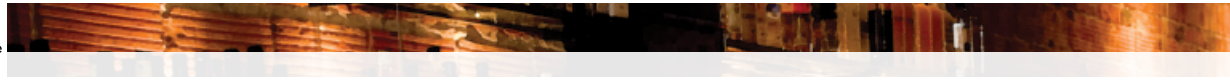
1. From the Manager screen, select **Menu**.
2. Select **Choices**.
3. Select **New**.
4. Enter information to create the new Choice (e.g., "Spinach Salad").

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5. In the **Has these Sub-Choice Sets** section, select the **Salad Dressings** Choice Set, and then tap **OK**. The **Sub-Choice Sets for** window closes.
6. In the **Is Part of These Choice Sets** section, select **Choice Sets**.
7. Select the **Side Dish** Choice Set from the list, and then tap **OK**. The **Choice Sets Containing** window closes.
8. In the Edit Choice window under Select the new Choice (Spinach Salad”) from the **Items not in Side Dishes** list on the right.
9. Use the arrows between the lists to move the new Choice to the **Items in the Side Dishes** list.

### *Setting Up Choices within a Choice Set*

For a Choice to display on the Order Entry screen when a linked Menu Item is selected, you must assign the Choice to appropriate Choice Sets. (See [Choice Sets](#) for information on how to set up Choice Sets).

### To create a Choice and add it to a Choice Set:

1. From the Manager screen, select **Menu**.
2. Select **Choices**.
3. Select **New**.
4. Enter information about the new Choice.
5. Under **Comes with these Choice Sets**, select the Choice Sets to which you want to assign the new Choice. You may assign the Choice to as many Choice Sets as you like.

### To add a Choice to a Choice Set:

1. From the Manager screen, select **Menu**.
2. Select **Choices**.
3. Select the Choice you want to assign, and then select **Edit**.
4. Under the **Comes with these Choice Sets** section, select the Choice Sets to which you want to assign the Choice. You may assign the Choice to as many Choice Sets as you like.

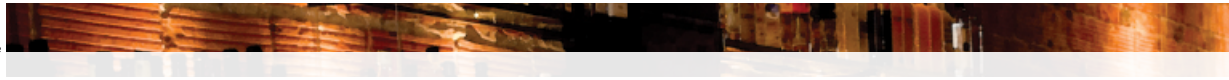
—OR—

1. From the Manager screen, select **Menu**.
2. Select **Choice Sets**.
3. Select the Choice Set to which you want to add the Choice.
4. Select the Choices in Choice Set. The **Add Choices to this Choice Set** screen displays.
5. Select a Choice from the **Choices not in (Choice Set)** list.
6. Use the left arrow between the two list columns to add the Choice to the **Choices in (Choice Set)** list.

### Note

If you make a mistake, tap the right arrow to return the item to the *Items not in (Choice Set)* list to remove the mistaken item.





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### *When to Create a Choice and When to Create a Menu Item*

A Choice is a specific option (e.g., pepperoni) available to modify a given Menu Item. A **Choice is never ordered without an associated Menu Item**. You cannot order a Choice by itself, without a Menu Item.

**A Menu Item is an item that may be ordered from the menu, with or without modification.** Most Menu Items can be ordered without an associated Choice. However, you may set up the Menu Items so that certain accompanying choices must be made.

### *Example: Is the small salad on my seasonal menu a Choice or a Menu Item?*

If a small salad may be ordered by itself, without any other Menu Item:

- Create the salad as a **Menu Item**

If a small salad *only* comes as a side order to a Menu Item:

- Create the salad as a **Choice**

### **Note**

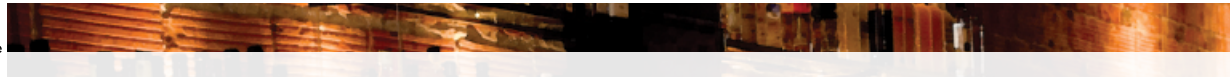
If your restaurant serves identical small salads as both sides to entrees *and* as independently-available orders, then you should create two different small salad entrees: one as a Choice (for the salad that only comes with an entrée) and one as a Menu Item (for the salad that may be ordered by itself).

### *Example: Use Choices for Meat Temperatures*

Remember, for a Choice to display with a Menu Item, you must assign a Choice Set to that Menu Item. You can set up a series of mandatory meat temperature choices for a steak by creating a *Meat Temperature* Choice Set, creating meat temperature Choices, and assigning the Meat Temperature Choice Set to the *Steak* Menu Item.

To set up required meat temperature choices for steak orders

1. From the Manager screen, select **Menu**.
2. Select **Choices**.
3. Select **New**.
4. Create Choices for meat temperature—such as **Rare**, **Medium**, and **Well Done**—and then click or tap **OK**.
5. Select **Choice Sets**.
6. Select **New**.
7. Enter information about Meat Temperature options:
  - a. Name the Choice Set **Meat Temperature**.
  - b. Select the **Allow Only One Choice** option (because you may only select one doneness option).
  - c. Click or tap to remove the checkmark from the **This is an optional choice set** option.
  - d. Make sure that a checkmark displays in the **Active** option box.



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8. Then, tap or click **OK** to return to the Choice Sets screen.
9. On the Choice Sets list, select **Meat Temperature**.
10. Select **Choices** in Set
11. Use the scroll arrows to move up and down the list to select choices to be included in the Choice Set (i.e. **Rare**, **Medium**, and **Well Done** from Step 4), and then tap or click **OK**.
12. Select **Menu Items**.
13. Select **New**.
14. Create a Menu Item called **Steak**.
15. Under Choice Sets, select **Meat Temperature**. Now, every time a user selects **Steak** on the Order Entry menu, the user will be required to indicate the Meat Temperature choice to place the steak order.

### *Using Price Modifiers to Charge Extra for Choices*

Dinerware allows you to add extra charges for optional additions to Menu Items, such as adding bleu cheese to a burger. You can use the **Edit Choice** screen to have these extra charges added automatically to the ticket by using **Price Modifiers**.

Price Modifiers can be set up to charge either a flat rate or a percentage of the Menu Item's price for adding a specific Choice to the Menu Item.

#### **Note**

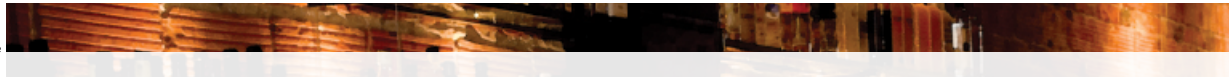
Please do not confuse the Price Modifier function with the Choice Cost function, which is also located on the Edit Choice screen. Choice Cost is a measure of how much the Choice costs the restaurant to add to the ticket, not how much the customer paid for it.

Price Modifiers can be applied to a Choice in two ways: 1.) as a **fixed amount** (Add tartar sauce = 25 cents); or 2.) as a **percentage of the price of the Menu Item**. If you use the percentage price modifier, when you raise the price of the Menu Item to which the Choice is linked, the price of the Choice will increase automatically.

### *To set up a Price Modifier for a Choice*

1. From the Manager screen, select **Menu**.
2. Select **Choices**.
3. From the list, select the choice for which you want to set the Price Modifier, and tap or click **Edit**.
4. In the **Price Modifier** section, assign either a **Fixed Amount** or a **Percentage** (of the Menu Item) to be charged for the Choice.





# Setting Up Your Dinerware Menu (version 3.4 and newer)

## Using Choice Sets

Dinerware allows you to control what Choice options display when any given Menu Item is selected on the Order Entry screen. Choices may be edited and added on the Choice Sets and Choices screens. To reach these screens, select **Menu** on the Manager screen.

You can use the **Choice Sets** screen to group together Choices that are linked to an entire category of Menu Items, such as salad dressings to salads or meat temperature to steaks.

You can also use the **Choices** screen to set up individual choices within choice sets.

Choices are always specific options (e.g., Ranch dressing), while Choice Sets are *categories* of Choices. This means that Choices are the actual options that display on the Order Entry screen when a Menu Item is selected.

Choice Sets are linked directly to Menu Items. This allows the linked Choice Set to display automatically when the Menu Item is selected on the Order Entry screen.

You may designate one of the Choices on a Choice Set as the **default choice**. The default Choice will be sent with the Menu Item order *unless another Choice is made*.

Some examples:

<u>Menu Items:</u>	<u>Choice Sets:</u>	<u>Choices:</u>
Spinach Salad	<b>Salad Dressings</b>	Ranch, Bleu Cheese, French, Italian
Tuna Melt	<b>Cheeses</b>	American, Swiss, Pepper Jack, None
Ribeye Steak	<b>Meat Temperature</b>	Rare, Medium, Well Done

## Managing Menu Item Choices with Choice Sets

Dinerware allows the manager to set up in advance what options are available for any given Menu Item. Choice Sets allow you to set up an array of choices that will display when a particular Menu Item is selected on the Order Entry screen.

You can designate any given Choice as *optional* (such as toppings on a burger) or *mandatory* (such as type of crust on a pizza). To do this, you may set up a Choice Set which will automatically list both the available options and required Choices on the screen every time a user selects a particular item.

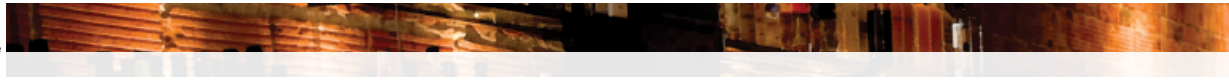
Once a Choice Set is established, you will need to add Choices to it. Otherwise, the Choice Set is just a name, rather than an array of Choices presented for a particular Menu Item.

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#### To Set Up a New Choice Set:

1. From the Manager screen, select **Menu**.
2. Select **Choices Sets**.
3. Select **New**.
4. Enter the following information:
  - a. Name the Choice Set (e.g., *Hamburger Toppings*).
  - b. Select whether the item has **Multiple Choices** or One Choice
  - c. Select whether the Choice is **Optional** or **Not Optional**
  - d. Select whether Choice Set is **active** or **inactive**.
5. Tap or click **OK** to return to the Choice Sets screen.
6. Select **Choices in Set**.
7. Select **Choices** to be included in the Choice Set.

#### Linking Choices to Choice Sets

Choice Sets allow you to set up the array of Choices that will display when a particular Menu Item is selected on the Order Entry screen. To have Choices display as part of a Choice Set, you will need to link them. The Choice Set, in turn, is linked to the applicable Menu Items.

To put it another way, when you tap the **Filet Mignon** Menu Item on the **Order Entry** screen, a group of *Meat Temperatures* displays, so that the server can select the doneness for the customer's filet mignon. The server selects *Rare* from the list of Choices, and then the order is sent to the kitchen printer.

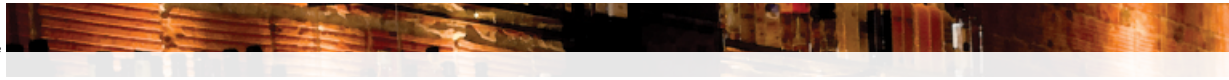
In this example, the group of *Meat Temperatures* is the Choice Set linked to the Filet Mignon Menu Item, and *Rare* is one of the Choices assigned to the Choice Set.

#### To add Choices to an already created Choice Set:

1. From the Manager screen, select **Menu**.
2. Select **Choices Sets**.
3. Select the desired choice set from the Choice Set list. If the desired Choice Set has not yet been created, then you will need to create it before you can add choices to it. For more information about creating a new Choice Set, see *Set Up a New Choice Set*, above.
32. Select Choices in Set. The **Link Choices to this Set** screen displays.
33. On the **Items not in (Set Name)** list, select Choices, and add them to the **Items in (Set Name)** list by selecting the left arrow located in between the two lists.

#### Note

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### **Using Choice Sets to Make Placing Orders Easier**

When a Choice Set is linked to a Menu Item, the Choices contained in the Choice Set display automatically when the Menu Item is selected on the Order Entry screen.

To have the appropriate Choice Set display automatically when a Menu Item is selected, you may either set up this option when you are creating the Menu Item, or you may edit the Menu Item later to add this option.

In the **Edit Choice Set** screen, you may pre-set whether a Choice Set allows *multiple* Choices or requires a *single* choice to be selected.

You may pre-set whether to require that a Choice be selected before the order will be sent to the printer, or whether the Choice is optional.

### **Don't forget to add Choices to the Choice Set!**

#### **Important**

The Choice Set will display automatically **ONLY** if it is designated as a **REQUIRED Choice Set**. Otherwise, a selected Menu Item needs to be highlighted in order to prompt optional Choice Sets.

### **Setting up Optional and Required Choices**

When you set up a Choice Set, you can decide whether a user is required to select a Choice before sending the order to the kitchen.

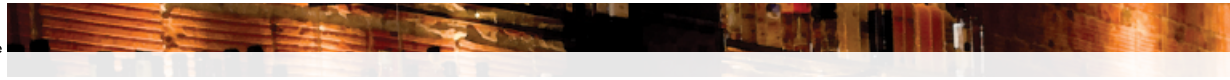
**The default setting when creating Choice Sets is that Choices are optional.** If a Choice Set is optional, then users can send orders to the printer without entering any Choice.

To require a Choice selection for a particular Choice Set:

1. From the Manager screen, select **Menu**.
2. Select **Choice Sets**.
3. Select the Choice Set you want to require Choices for, and then press or tap **Edit**.
4. In the **Choice Set Rules** section, tap or click to select the **Required** option.

## **Creating Menu Items**

Dinerware allows you to decide how and where any given Menu Item displays on your Order Entry screen. You can also organize Menu Items into Screen Categories, set individual or category prices, designate where orders will print out, and decide how to display each Menu Item's available Choices.



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### Important

We strongly recommend that you create all the previously-described parts of your Dinerware menu (*Revenue Classes, Taxes, Screen Categories, Item Groups, Choice Sets, and Choices*) **BEFORE** you create any Menu Items. This will save you time and frustration.

Dinerware is designed to make it easy for you to enter new Menu Items. **You can speed up the initial menu creation process even more if you have the following information available for each Menu Item before you begin:**

- **Name** of each Menu Item
- **Alternative Kitchen Print Name (optional)** - especially helpful for printing items in another language
- Applicable **taxes**, if any
- The **Revenue Class** to which each Menu Item will belong
- The **Item Group** to which each Menu Item will belong, and the price you plan to charge for it
- **Cost of Menu Item to produce (optional)**
- **Screen Category** to which each Menu Item will belong
- The **Choice Sets** offered with each Menu Item
- The **Choices** offered with each Menu Item
- **Printer(s)** to which the Menu Item's orders should be sent
- The **location on the Order Entry screen** where you would like the Menu Item to display

After you have gathered all of the above information, you will be ready to create Menu Items in Dinerware.

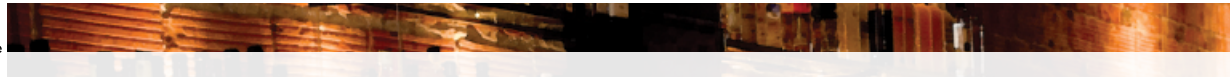
### To create a new Menu Item:

1. From the Manager screen, select **Menu**.
2. Select **Menu Items**.
3. Select **New**.
4. Enter applicable information for the Menu Item, including the item's name, description, Alternative Kitchen Print Name, the Item Group and Screen Category it belongs to, price, Revenue Class, printer selection, and any applicable Choice Set, and then tap or click **OK**.

You can use the **Edit Menu Item** screen to create Menu Items with a unique price (instead of an Item Group price). However, you should still assign each Menu Item to an Item Group.

### To create a new Menu Item with a unique price:

1. From the Manager screen, select **Menu**.
2. Select **Menu Items**.



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3. Select **New** to create the new Menu Item.
4. Enter the relevant information about the new Menu Item.
5. Tap or click to select the **Item has a Unique Price** checkbox.
6. Enter the desired price for the Menu Item, and then tap or click **OK**.

## To edit an existing Menu Item:

1. From the Manager screen, select **Menu**.
2. Select **Menu Items**.
3. Select **Edit**.
4. Edit the applicable information for the Menu Item, and then tap or click **OK**.

If you have any questions about building your menu, or you would like additional guidance, please contact your authorized Dinerware dealer.