

ADMINISTRATOR USER GUIDE: MENU EDIT TOOL

Our Menu Edit Tool is designed to help you make direct and immediate changes to your Catering, Take-Out, and/or Floor Stock menus*. With this guide, you will learn how to quickly edit prices, hide or show products, adjust order minimums, and add dates for seasonal or limited-time products.

**Available menus to edit are subject to your business or enterprise standards.*

ACCESS THE MENU EDIT TOOL

Make sure you are signed in to your administrator portal.

1. Click **Config** in the top navigation. (Figure 1)
2. Check **Menu Setup**.
3. Select **Menu Edit Tool**. (Figure 1)

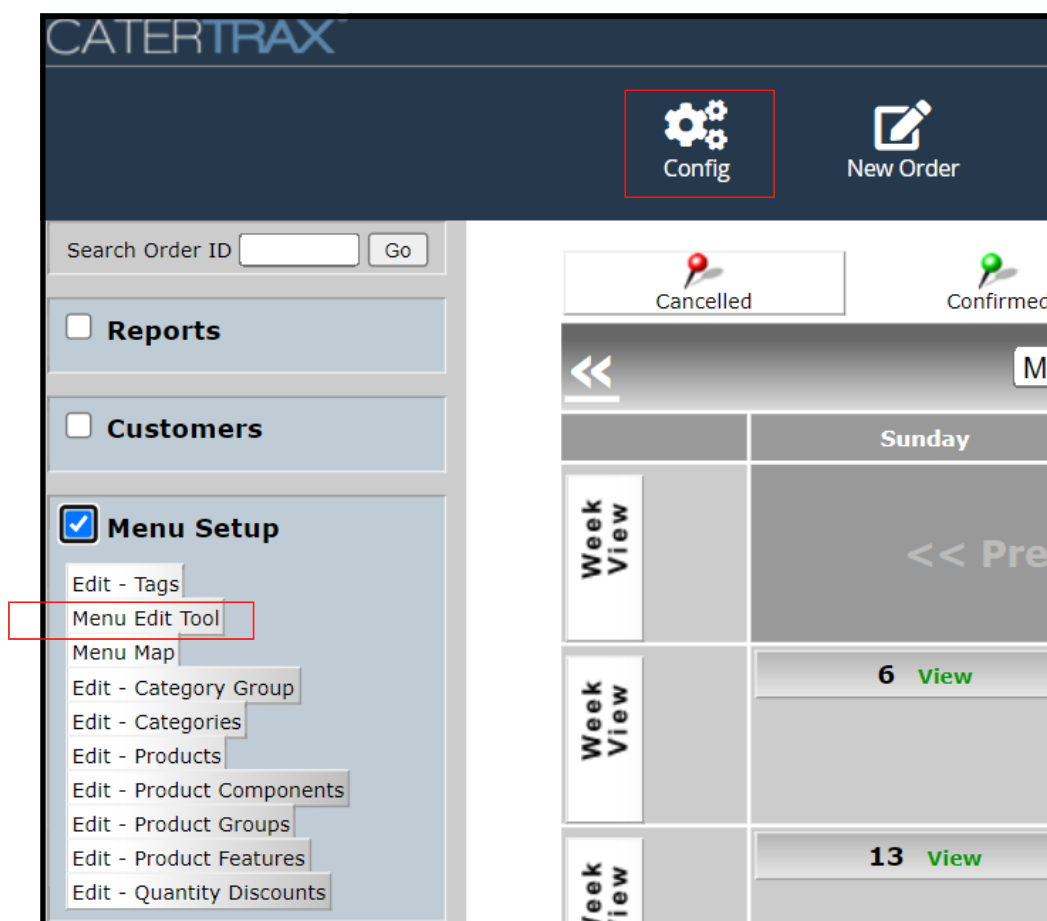


Figure 1 - Accessing the Menu Edit Tool

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NAVIGATE THE MENU EDIT TOOL

By default, the Menu Edit Tool tabs* will display all corresponding products, product components, features, and feature choices from the **entire site**. To only view items from a specific Catering, Take-Out, or Floor Stock menu, you will need to select that menu from the **Filter by Category Group** dropdown. (Figure 2)

Note: The **Products** tab is used for products that display a numerical price on your menu. If the product shows "Price Varies," allows the customer to select from a few options, or lists departments (for use with hospital Floor Stock), you must use the **Feature Choices** tab to edit those options.

**Available tabs and fields to edit are subject to your business or enterprise standards.*

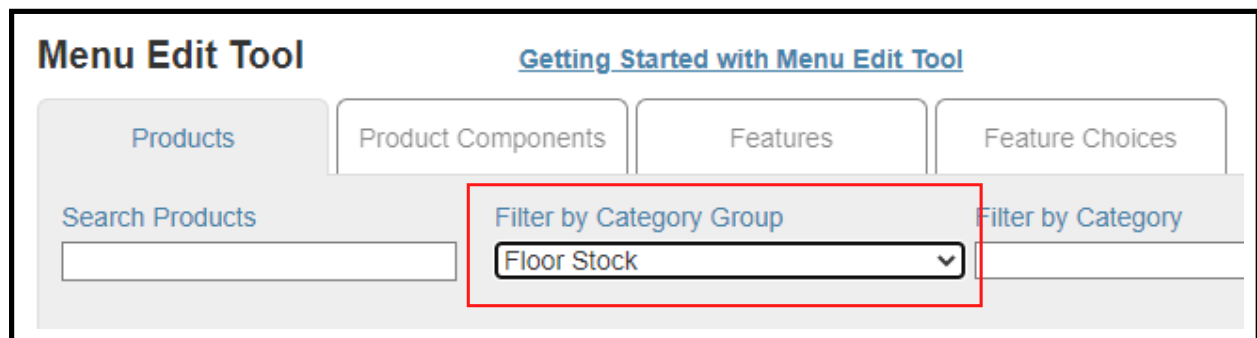


Figure 2 - Filter by Category Group

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EDIT PRICES

You can edit prices for both **products** and **feature choices**. Change the price displayed on your menu by entering your new price in the appropriate field. (Figure 3)

215	2S	b	1498	Coffee, Liq. Conc. - per Qt	39.2
215	2S	1	1499	Cranberry Juice, 4 oz. (par 24) -	0.13
215	2S	h	1500	Creamer - Non Dairy Liquid (par	0.03
215	2S	a	1501	Decaf Coffee 1.25 oz., Royal Cu	0.73
215	2S	c	1502	Decaf Coffee Liq. Conc - per Qt	42

Showing 1 to 10 of 341 entries (filtered from 1,255 total entries)

First Previous 1 2

Save Changes Export Feature Choice List

Figure 3 - Floor Stock: Price Edits

NOTE: When you alter any of the fields in the Menu Edit Tool, the box will highlight yellow until you click **Save Changes**. **You must always select Save Changes or your edits will not be applied.** (Figure 3)

ADD MINIMUM QUANTITY

Add a minimum **product** quantity by entering the minimum value in its **Min Qty** field. (Figure 4)

Note: Adding a minimum will force that value to default into the quantity field for that product. If customers try to order less, the system will prevent them from adding the items to their cart. Minimums can only be set for **products**, not for feature choices.

Menu Item Name	Menu Item Description	Kitchen Notes	Price	Hidden	Min Qty
Table and Stage Drapir	Tables may be draped for regi...		0	<input type="checkbox"/>	
Traditional Buffet	Traditional Buffet for any even...	Garden Salad, Oven Roasted...	12.99	<input type="checkbox"/>	10

Figure 4 - Catering: Minimum Quantity

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HIDE PRODUCTS / FEATURE CHOICES

To hide a **product** or **feature choice** that you no longer want to allow customers to order, check **Hidden** in the appropriate row. (Figure 5)

- If you hide a **product**, the entire offering will be hidden from your menu.
- If you hide a **feature choice**, only that specific choice will no longer be available. The rest of the options can still be ordered. (To hide all of the options, you must hide the entire **product** rather than all of the **feature choices** individually.)

To hide an entire category or menu, you must submit a support ticket.






Feature Choice		Price	Hidden
1% Milk, 4 oz. (par 8) - each		0.18	<input type="checkbox"/>
Apple Juice, 4 oz. (par 24) - each		0.13	<input type="checkbox"/>
Apple Sauce, 4 oz. (par 8) - each		0.66	<input type="checkbox"/>
Boxed Meals (par 2) - each		2	<input type="checkbox"/>
Coffee, Ground 1.7 oz., Royal C		0.67	<input type="checkbox"/>

Figure 5 - Floor Stock: Hidden Feature Choices

ADD START AND/OR END DATES

To make a product or feature only visible for a specified time, select a date in the **Start Date** and **End Date** fields. (Figure 6)

This is commonly used for seasonal and limited-time items.

Menu Item Name	Menu Item Description	Kitchen Notes	Price	Hidden	Min Qty	Start Date	End Date
Build Your Own	Select all of your favorite! So...		5	<input type="checkbox"/>			
Chipotle Chicken Wrap	Grilled Chicken Breast rubbe...	Grilled Chicken Breast / Chip...	6.99	<input type="checkbox"/>			
Chips and a Drink	Add Chips and a 12 oz. drink ...		1.29	<input type="checkbox"/>			
Classic Reuben	Melted Swiss Cheese, Sauer...	Melted Swiss Cheese / Sauer...	4.29	<input type="checkbox"/>			

Figure 6 - Take-Out To-Go: Start and End Date Fields

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EDIT LOCAL FAVORITES*

In every category on your new menu, you will notice two or more **products** that are named **Local Favorites**. These products are **hidden by default** and have no description, kitchen notes, price, or caloric information. They are available for you to edit and customize local options on your menu.

You can edit the descriptions and prices of these products while hidden so you can add them to orders without them being visible to all customers. (Figure 7) To allow customers to order these items, uncheck **Hidden**.

**Availability of Local Favorites to edit is subject to your business or enterprise standards.*

ID	Sort	Menu Item Name	Menu Item Description	Kitchen Notes	Price	Calories Min	Calories Max	Hidden
205	01	Local Favorite	Get a jump on the day! Just the	Fresh Sliced Fruit, Assorted P...	5.99			<input checked="" type="checkbox"/>
206	02	Local Favorite			0			<input checked="" type="checkbox"/>

Figure 7 - Editing Local Favorites

CHANGE LOCAL FAVORITE NAME

To change the name of a Local Favorite, you must submit a menu support ticket with the following items in the description:

- **ID Number** that the Local Favorite product is found in
 - **Note:** Product ID numbers are on the **Products** tab near the **Menu Item Name**
- **Category** that the Local Favorite product is found in
- **New name** for this Local Favorite product

These items are critical as there are two of these products per category. You want to ensure that the CaterTrax Menu Team edits the correct version of the product.

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ADD LOCAL FAVORITES TO AN ORDER

1. Click **Add to Order** at the top of the customer's invoice. (Figure 8)
2. Navigate through the menu and select the exact **Local Favorite** you would like to add to the order. (Figure 9)
3. Add desired quantity.
4. Click **Add to Order**.
5. Click **Add Tracking Message / Close Window**.

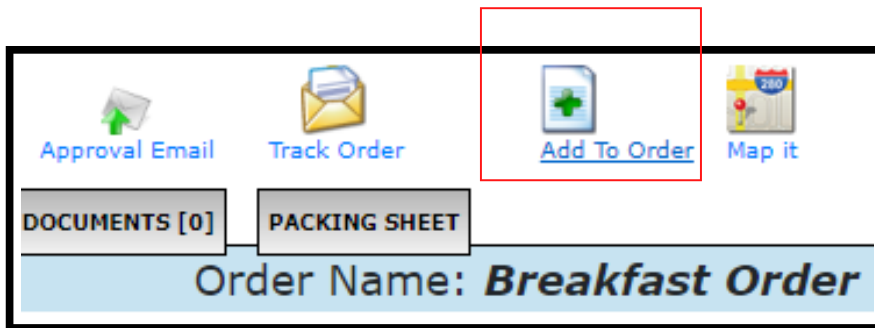


Figure 8 - Add to Order



Figure 9 - Select Local Favorite

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SUBMIT A MENU SUPPORT TICKET

Make sure you are signed in to your administrative portal.

1. Click **Support** in the top navigation. (Figure 10)
2. Click **Menu Requests** and select the category, **Revise Existing Menu**. (Figure 11)
3. Fill out the ticket fields.

CaterTrax Support will respond to the ticket once the menu edits are completed.

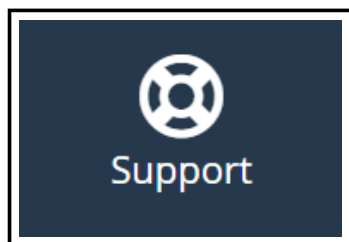


Figure 10 - Support



Figure 11 - Menu Requests

VIDEO TUTORIAL

For a video tutorial, click **Getting Started with Menu Edit Tool** above your tabs. (Figure 12)

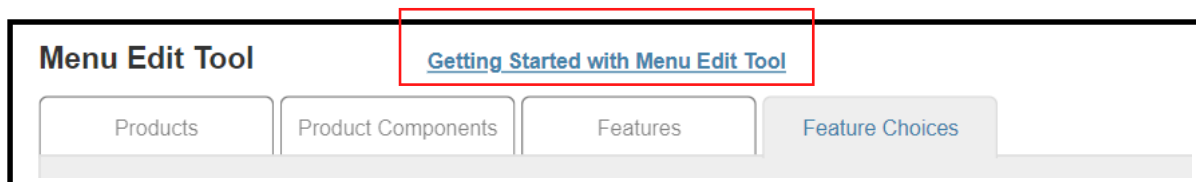


Figure 12 - Video Tutorial Link

QUESTIONS?



Submit a support ticket.