TALLORDER SOLUTIONS
TALLORDER ADMIN MANUAL
Tenant Start-Up Guide

TallOrder Guide

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1. Introduction

In this guide, you will learn how to customize your menu or product list for the TallOrder POS. There are 2 ways in which this can be done. This can be done from scratch in the TallOrder Back-End or with the use of the TallOrder Excel Template that can be used to import your product list/menu.

1.1. Glossary:

- Master Device: Device on which one can manage POS and Admin.
- Additional Devices: Devices that will be connected to the Master Device.
- Products: Items that will appear on TallOrder POS that will be for sale.
- Inventory: Stock items that are you order from your suppliers.

TallOrder Admin:
In this section, we will be focusing on setting up your menu or product list from scratch within the TallOrder Admin (back-end).

Please note that if you have enabled the online order app ToGo, please ask someone of on the CloudOne.mobi/ TallOrder team to supply you with the ToGo manual.

2. Product Settings
2.1. Creating Departments

Departments serve as reporting categories for reporting purposes. When products are assigned to a specific department, the products will be organized in a Category Report, which will allow the user to see how specific departments are performing. E.g. Savanna can be assigned to the Ciders department; Castle Light can be assigned to the Beer department – this way you can see how Beers in general are performing in terms of revenue generated and how frequently it was purchased.

Click on 'Products' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Products'. Select 'Departments'.
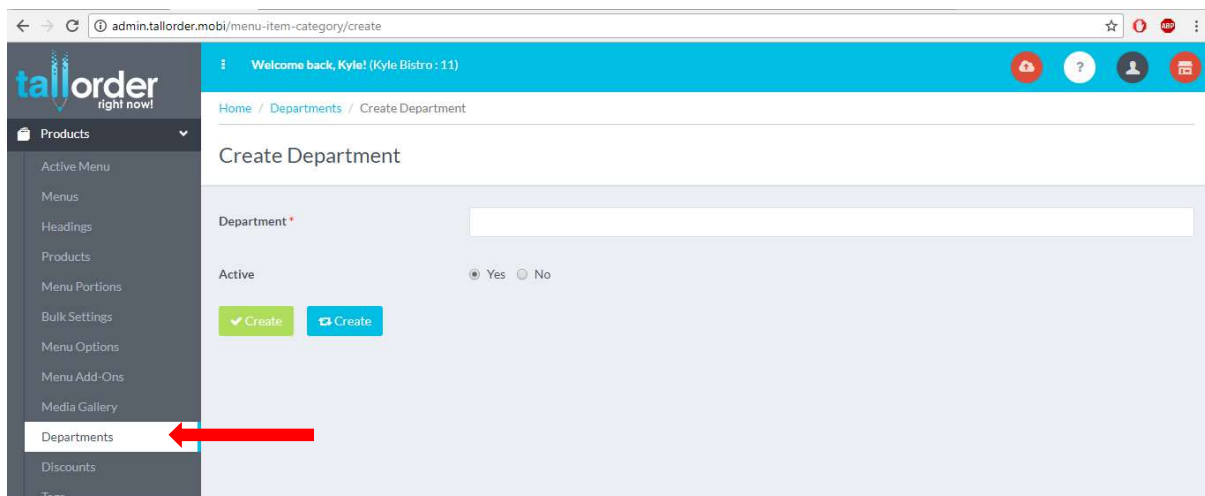
2.2. Creating Headings

Headings are functions that serve as a folder/category. In hospitality, a heading can be named "Mains" where you would then input a list of respective main dishes. In retail, a heading can serve the same purpose for a range of products such as "Washing Powder".

Click on 'Products' on the left-hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Products'. Click on 'Headings' and click on 'Create Heading'.
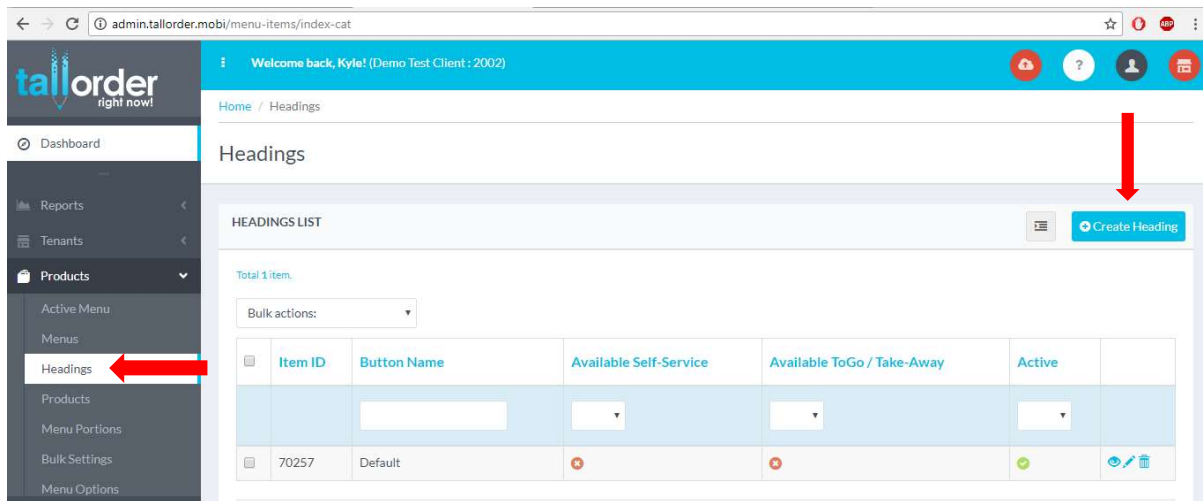
You can then input the name of your respective Heading – 'Button Name' is the name that will appear on the TallOrder POS display.

You can add a description for the respective Heading that the user can view from the TallOrder POS. You can also select which days of the week you would like the heading to be available and also what time of the day it will be available.

2.3. Creating Products

Products are the items/services that are for sale in your business. These items are anything that is to be sold in your business and items you want to have reporting records of. In hospitality, you can create products that serve as an extra for meals; such as extra eggs with a particular breakfast.

Click on 'Products' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Products'. Select 'Products' and then click 'Create Product'.
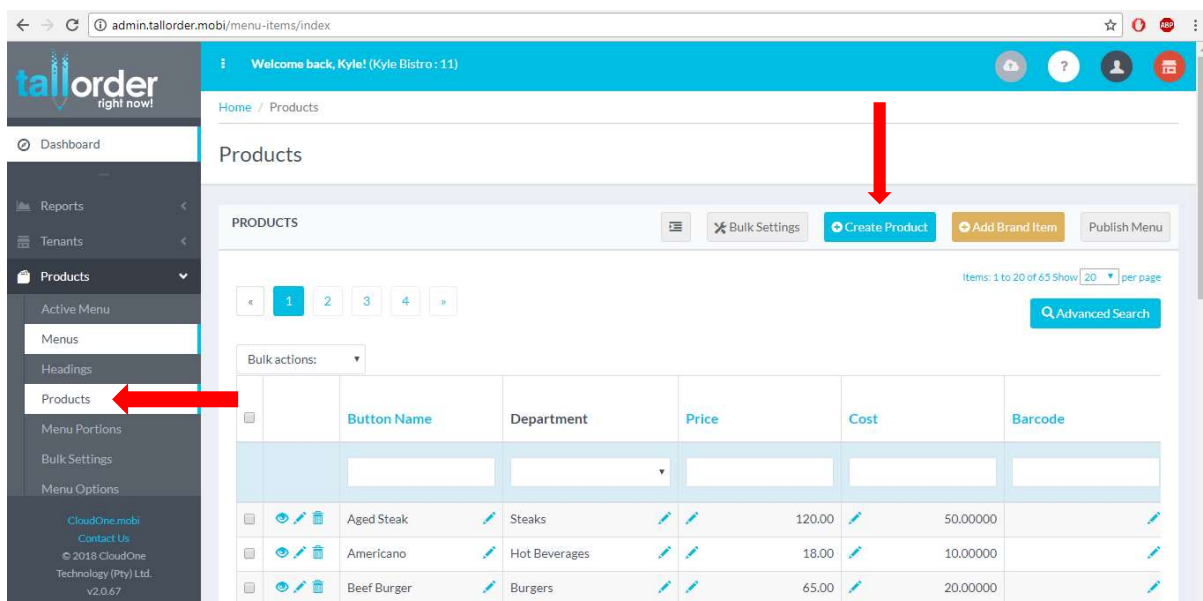
Input the name of the product/item – 'Button Name' is the name that will display on the TallOrder POS. Display Name is the name that will appear in TallOrder Reporting. 'Print Slip Name' is the name that will appear on your slips. You can also add a product/service description under 'Display Description'.

'SKU' serves as a product code that would be uniquely associated with a particular product – the search function on the POS will allow the user to search a product via SKU in Hospitality & Retail.

'Barcode' is a readable code that would be uniquely associated with a particular product – you can input the product/item barcode here. This will allow you to make use of a barcode scanner with TallOrder POS to scan items for sale. The search function in the TallOrder POS also allows you to search products via barcode.

'Department' contains reporting categories that allows you to assign a particular product to an already created department.

'Modifier Only' refers to marking an item, such as an Extra, to appear as an Add-On only.

Under the Finance Tab you can input the Selling Price in 'Price' and the Cost Price of the item in 'Cost'.
'Tax Group' allows you to make the particular product Taxable or non-taxable.

'On Special' allows a price to be overridden with a promotional price – If your product initially sells for R25, you can mark it on special for R15.

'SQ' refers to Seasonal Quote, which will require the user to input the SQ price.

Within the Availability Tab, you can stipulate specific periods of time/days that a product will be available.

In the POS Tab, the user can assign the item to print to a designated printer (this is more applicable for hospitality for production slips) such as a Kitchen Printer or Bar Printer etc.

The ToGo Tab allows you to stipulate whether the respective item/product will be available for ToGo and whether it will be an 'Auto-Accept' item on ToGo or not.

2.4.   How to Clone an External Menu:

If you wish to clone a menu from another one of your tenants you can do so by click on the "Products" drop-down tab on the left-hand side of Admin and then click on "Menu". Once in "Menu" click on the "Clone External Menu" button on the left.

You will be re-directed to another window in which you can select which tenant and which menu from that tenant you would like to clone.

Click "Clone" and it will clone the menu and close the window.
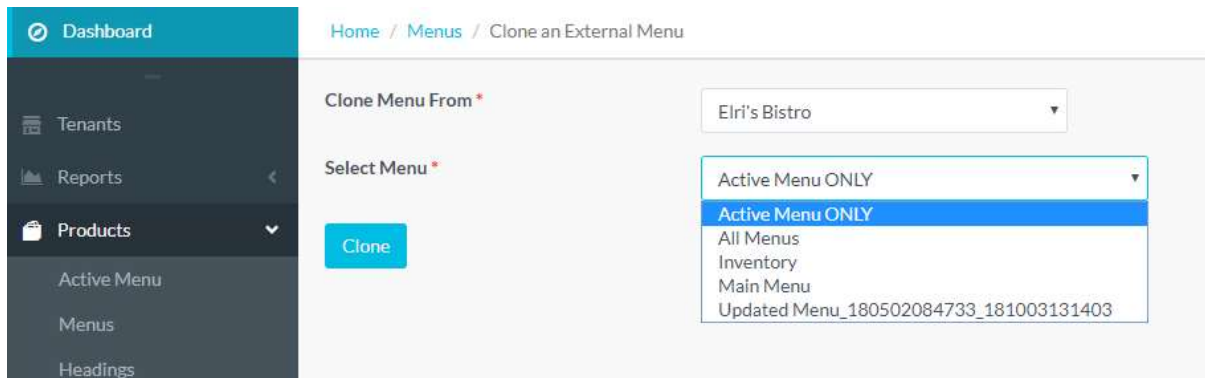
2.5.   Creating Menu Portions:

The Menu Portion feature allows you to establish different portions for the products on your menu. For example you can calculate how much 300g of a 500g steak would cost, etc. You can also calculate the price of the various portions.

To access Menu Portions:
- Click on the "Products" tab on the left of TallOrder Admin. Then select the "Menu Portions" tab. Once in this window you can organize your Menu portions and create new portion groups.
- In order to create a Menu group click on the "Create Group" button on the right.
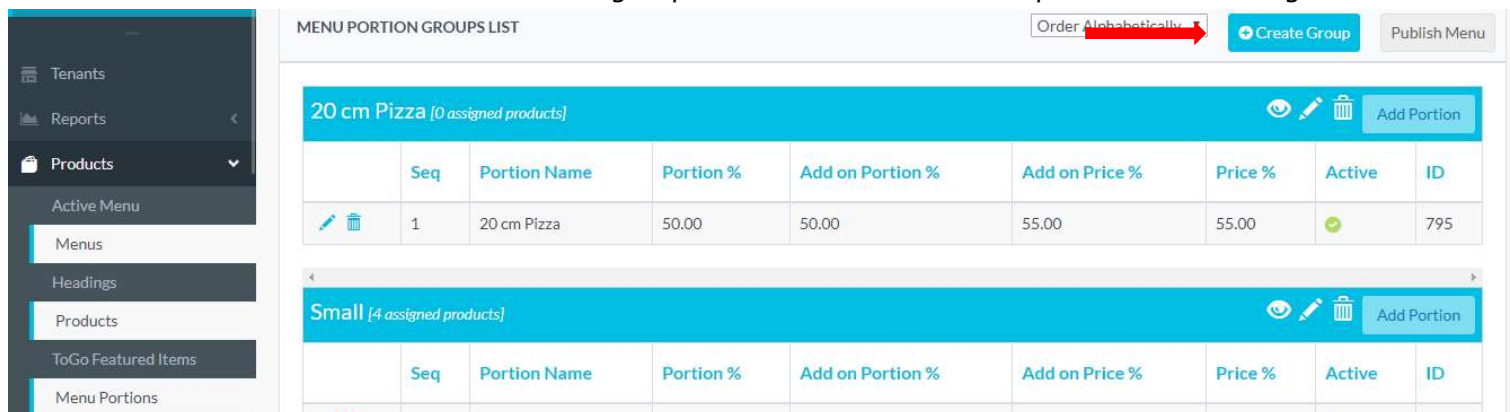
-You will be redirected to a "Create Portion Group" window in which you are organize the specific Menu item that you wish to divide into portions. Once you have customised the Menu Group Settings you can click "Create"
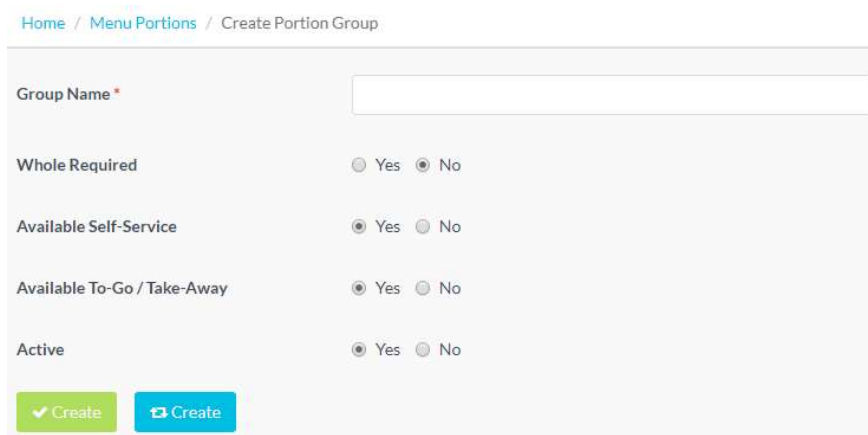
- You can then create Menu Portion within a group. Click on the "Add Portion" button on the right hand side of the Group Header.

- You can now customise your menu portion as you wish. You can give the portion as name and adjust the portions price as well.
- Once you have filled in the relevant information click "Create."
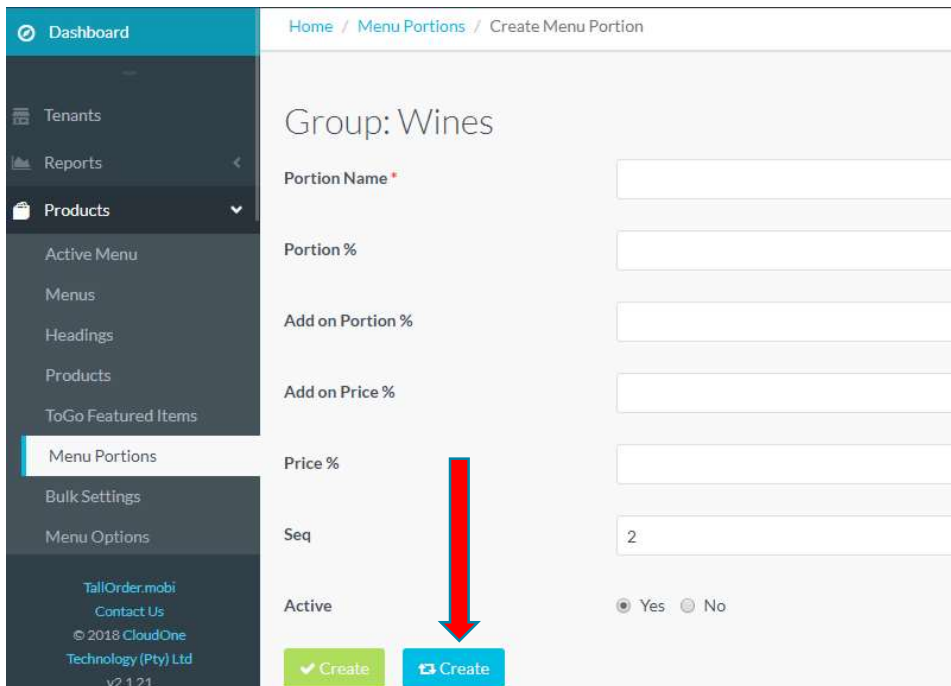

2.6. How to enable Bulk Settings:

You can enable Bulk Settings to apply to a number of products at once. This means that you do not have to gone into every product to apply new settings.
To access Bulk Settings:

- Click on the "Products" tab on the left of TallOrder Admin. Then select the "Bulk Settings" tab.
- Once in this window you can select the settings that you would like to apply to a larger number of Products.
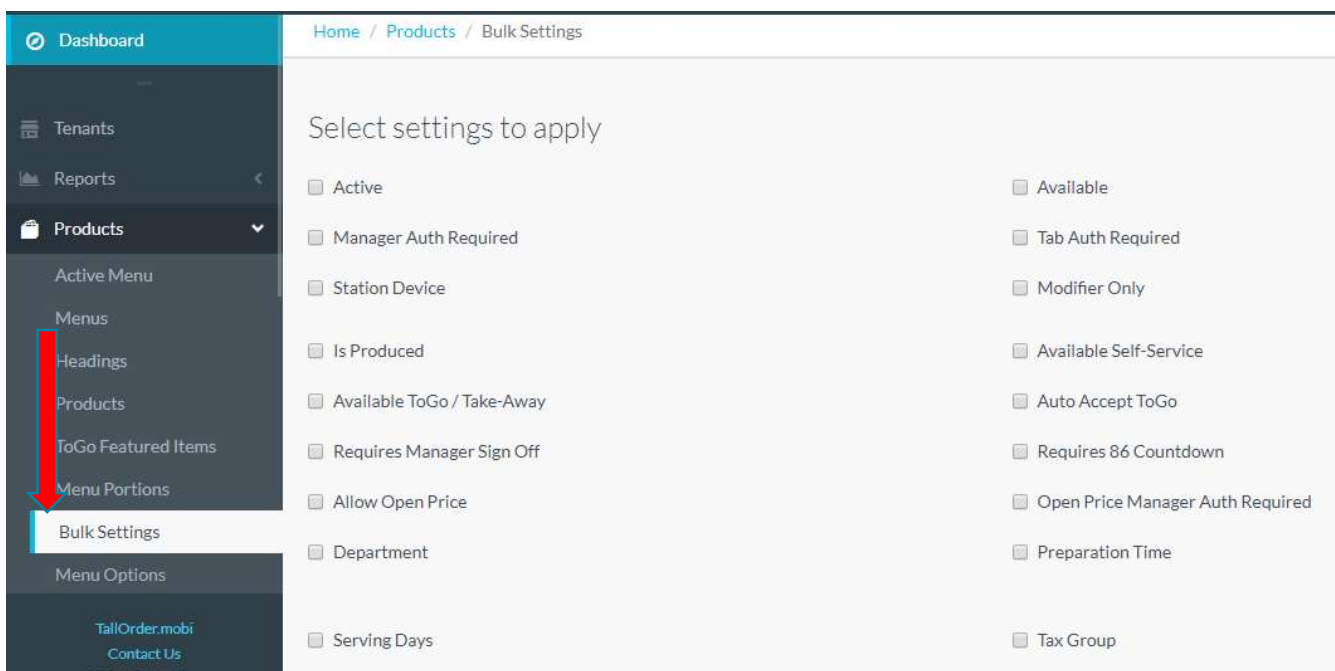
- You can also change the button colour of various products so that products under the same Header can be displayed with the same colour.
- You can customise these colours to match your own menu.
- To change the Button colours of Product select the "Button Colour" box on the left. You can choice which colours you would like to apply to specific headings. i.e. All Cold Drinks will appear Blue on the POS.
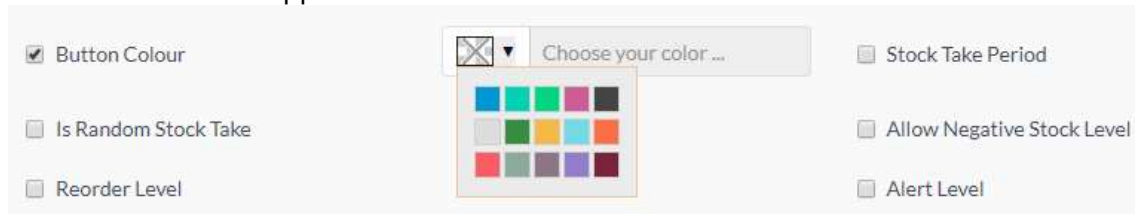
- You can also select which products those bulk settings will apply to.
- Once you have selected the Bulk Settings which you would like to apply scroll down to the Products.
- Once you have selected the products to which the settings will apply click on the "Apply Settings" button on the right or at the bottom of the page.
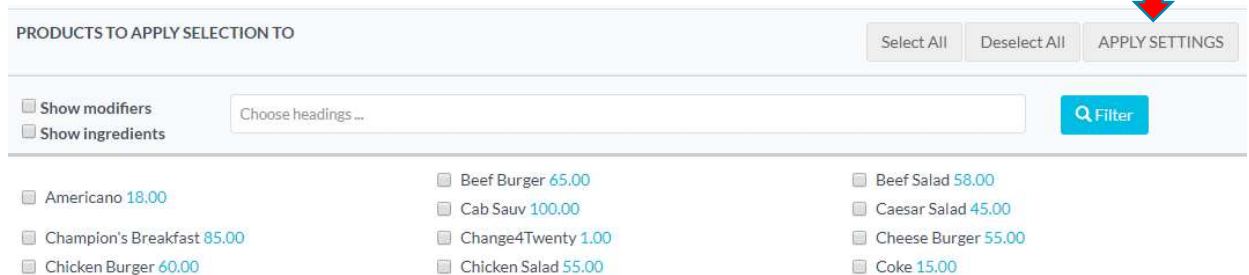

2.7.   Creating Options:

Options serve as a feature to ensure orders or transactions are processed accurately. Options are non-monetary. E.g. The temperature of a steak is an Option (rare, medium, well done). How eggs are prepared is also an Option (soft, poached, scrambled).

To set up Options, you would first need to create the group for the respective options:

Click on 'Products' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Products'. Click 'Menu Options'. Then select 'Create Group'.

TallOrder Guide
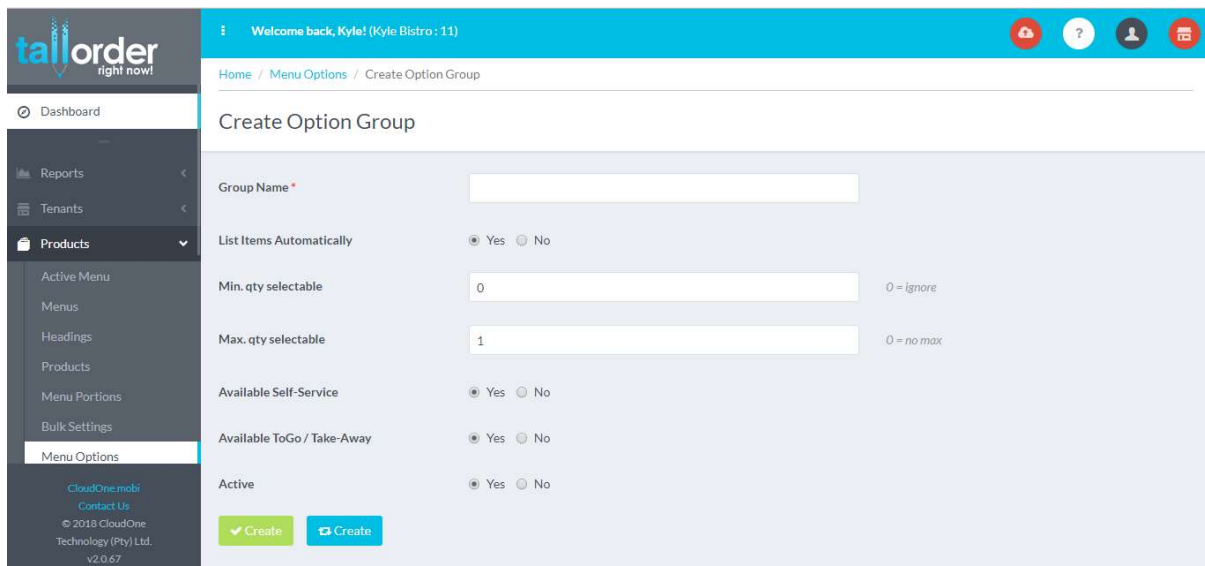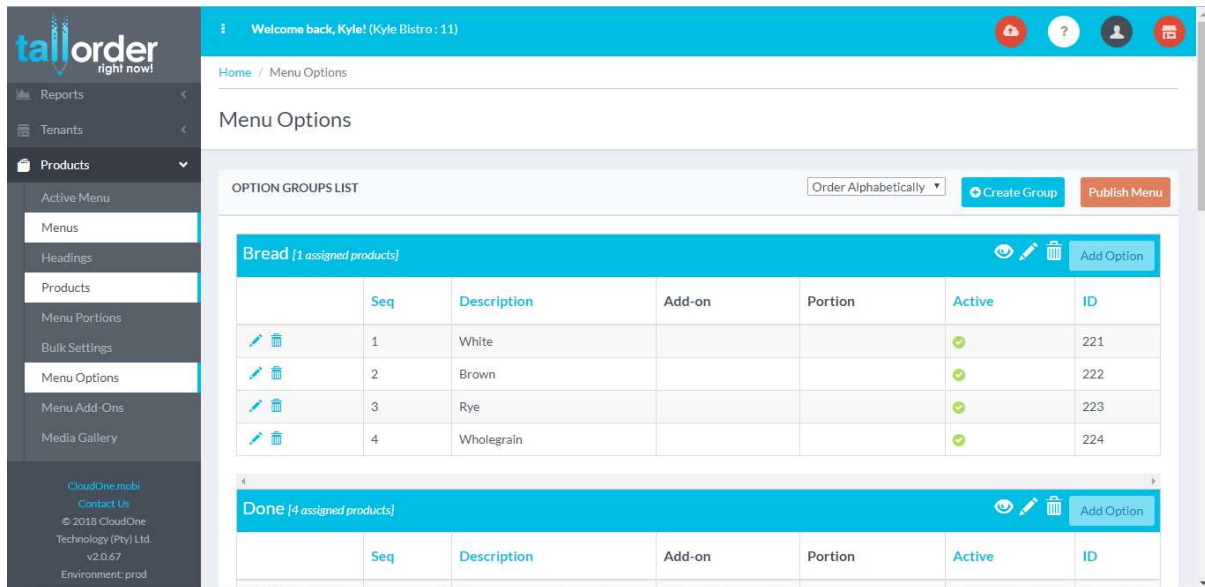
Secondly, you will need to create a list of your respective Options within the respective group – Start by clicking 'Add Option' for the created group:
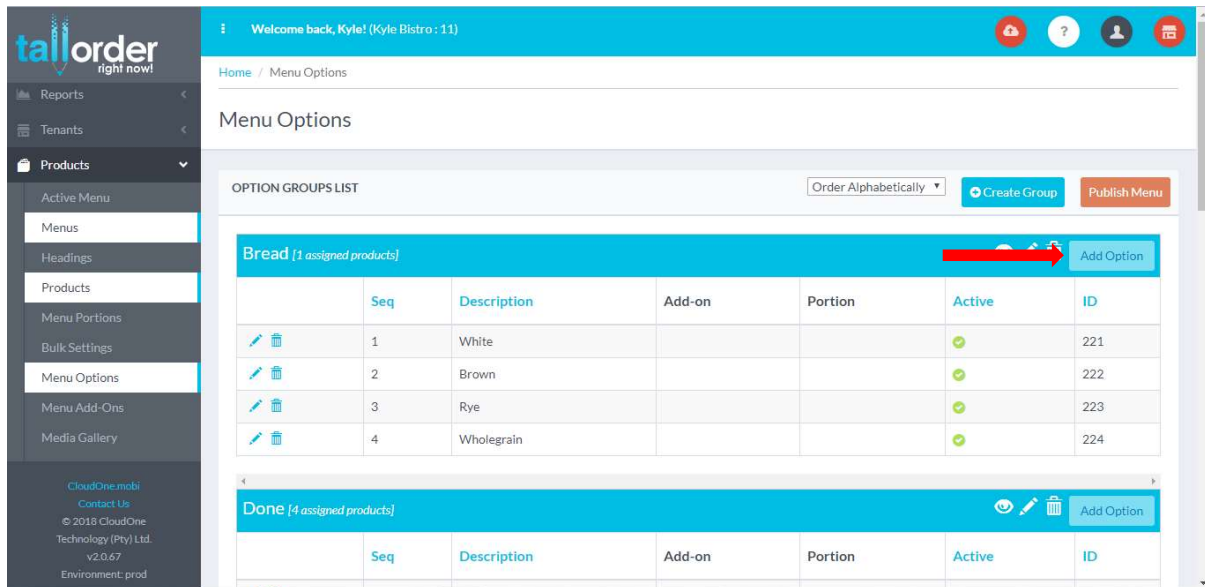
You will be able to input the Option description and stipulate the sequence order that it would appear in the TO POS – if you have more than one Option for a respective group, click on the blue "Create" icon to add more Options to the respective group.
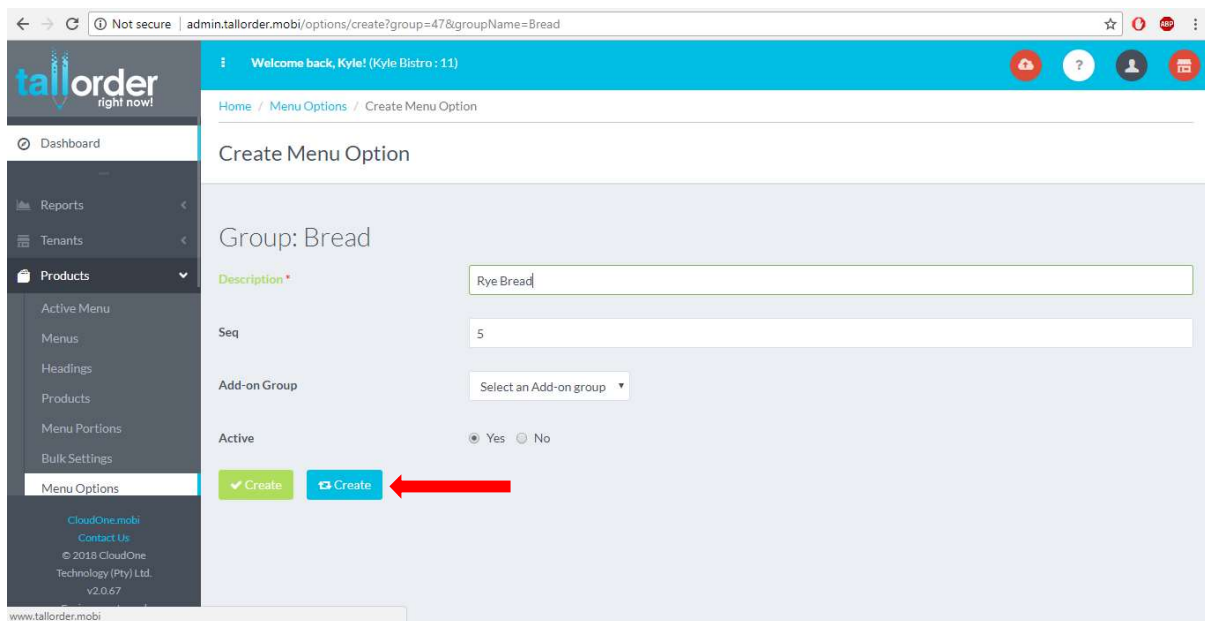
Lastly, you will need to assign the entire group with its Options to the respective product – Begin by clicking on the "eye" icon of the Option Group:
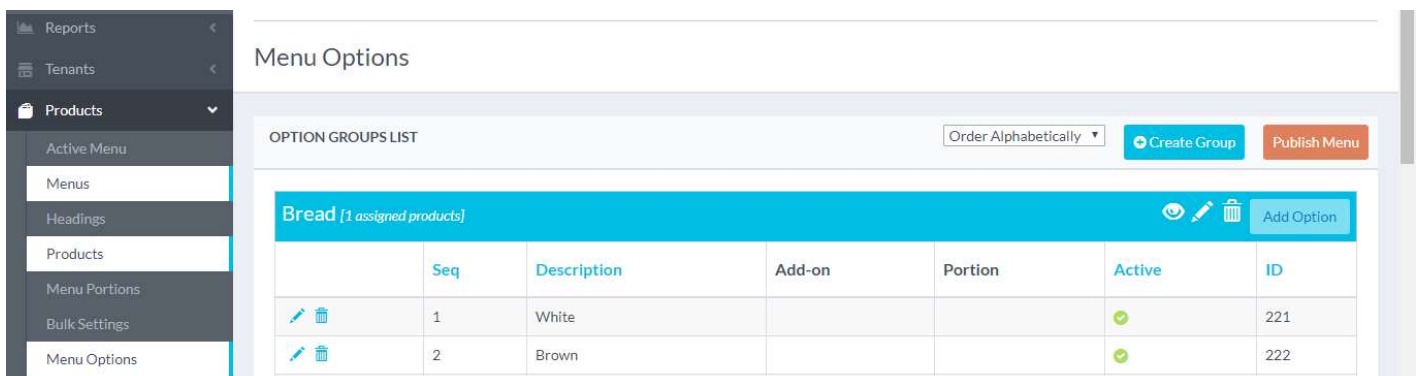
Next, click on the "Add" button in the 'Products using this Option' Tab and it drops down your product list – from here you will be able to tick the boxes for the respective products you want to assign the Option Group to:
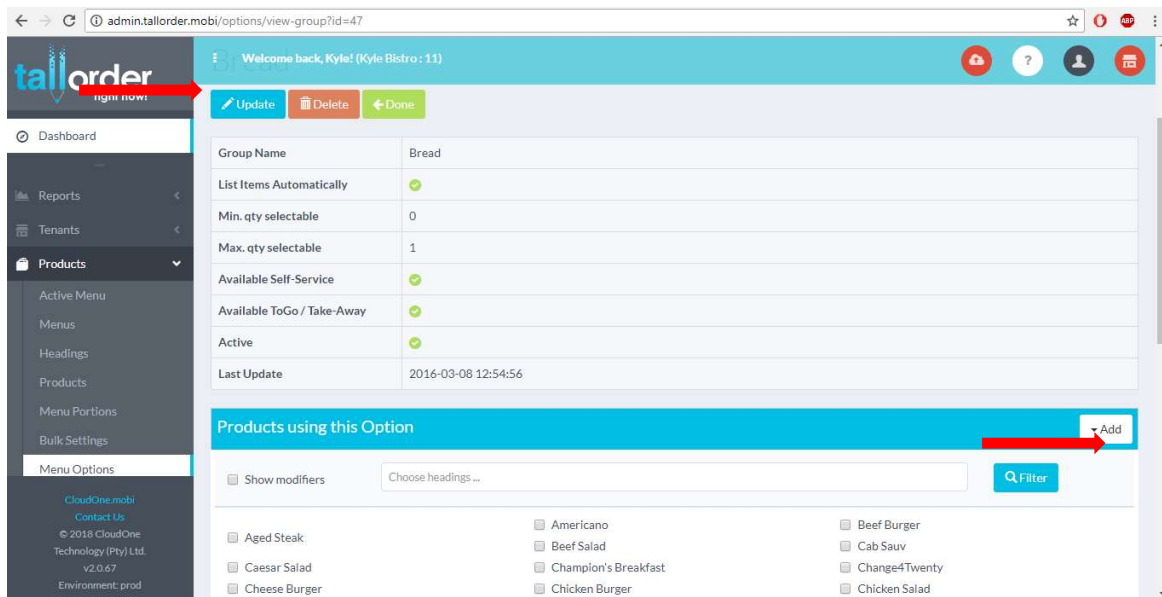
2.8. Menu Add-Ons

Menu Add-Ons are products that can influence price & stock levels. Add-ons are also used for upselling a product. E.g. Champions Breakfast may have an Add-on of extra bacon at R20 – this will prompt the user to ask the client if they would like extra bacon with their Champions Breakfast. Menu Add-Ons can also be a Recommended product. E.g. a particular wine may be best paired with a certain meal. Therefore the type of wine would be the recommended product for that particular meal.

Menu Add-Ons can also be a list of products in a hold group that may not influence price – E.g. when ordering a burger, a client may request that they do not want tomato, lettuce, or onion. These hold items can be set up as Add-ons.

Complimentary Add-ons are products that are given as free with a particular set of products or meal, but still influences the stock levels.

To set up Menu Add-Ons, you would first need to create the Add-On as a product (as Add-Ons are products that influence price and stock levels). See Chapter 2 for how to create a Product.

If you want an Add-On to be a modifier only (does not appear as an individual product in TallOrder but rather within a product itself) – you would need to select "Modifier Only" when creating the product:
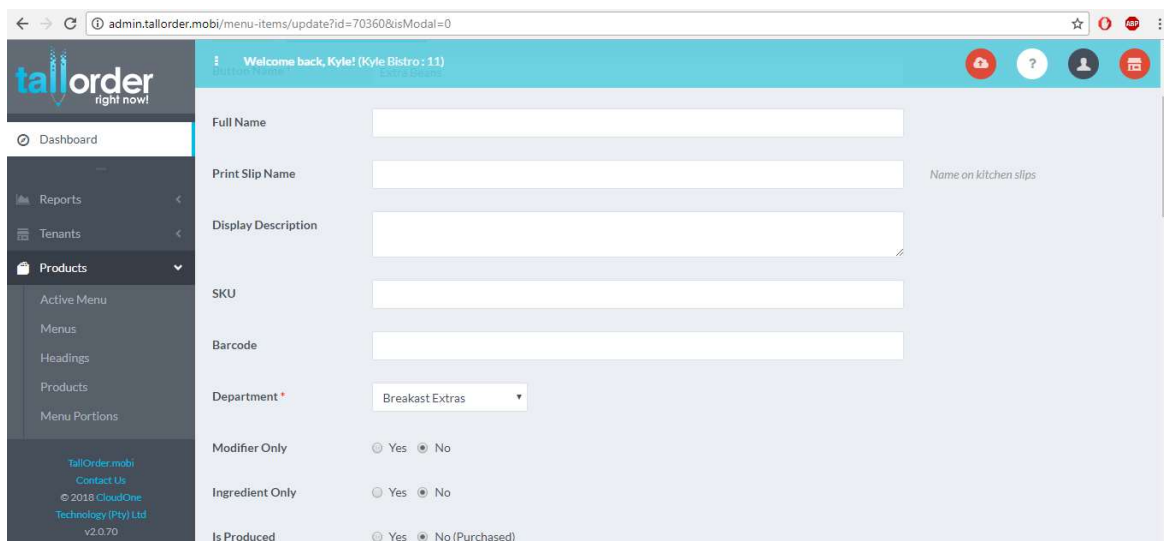
The next step is to create the respective Add-On group – Complimentary, Chargeable, Hold and Recommended Add-Ons will follow the same process.

Click on 'Products' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Products' Click 'Menu Add-Ons' and select the 'Create Group' button:
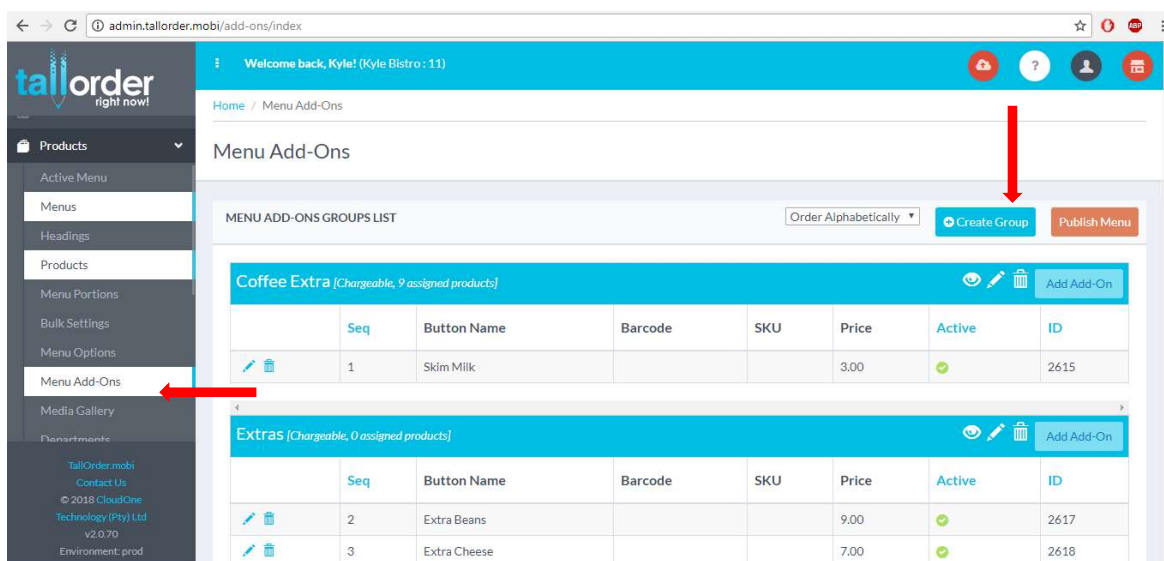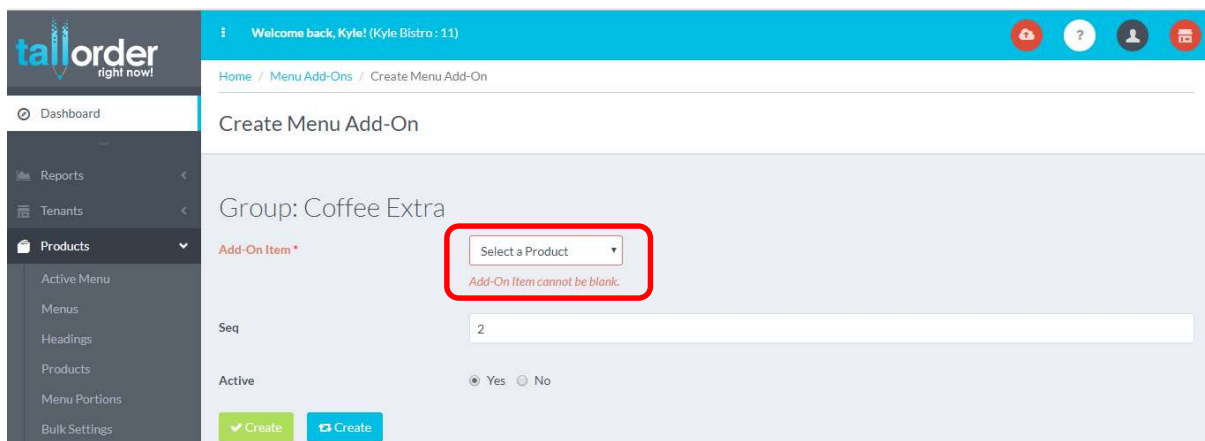

Firstly, name your respective group (E.g. Extras). Chargeable Add-On is the default Add-On. If the Add-On is a 'Hold Group' Add-On, then select 'Hold Group' etc.
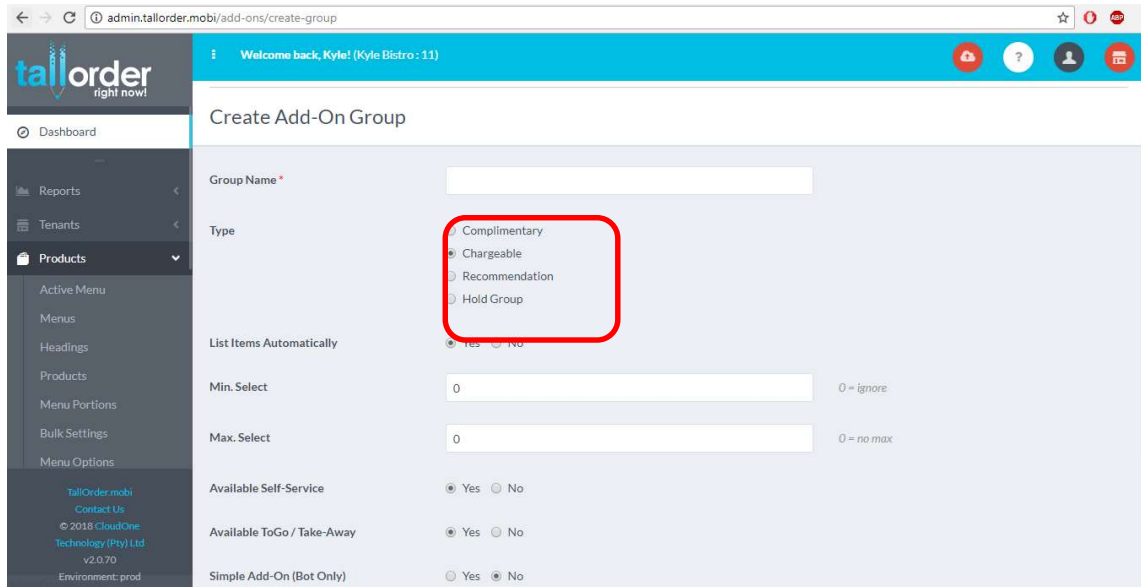
Secondly, you will have to add the respective Add-Ons (products) to the Add-On Group:
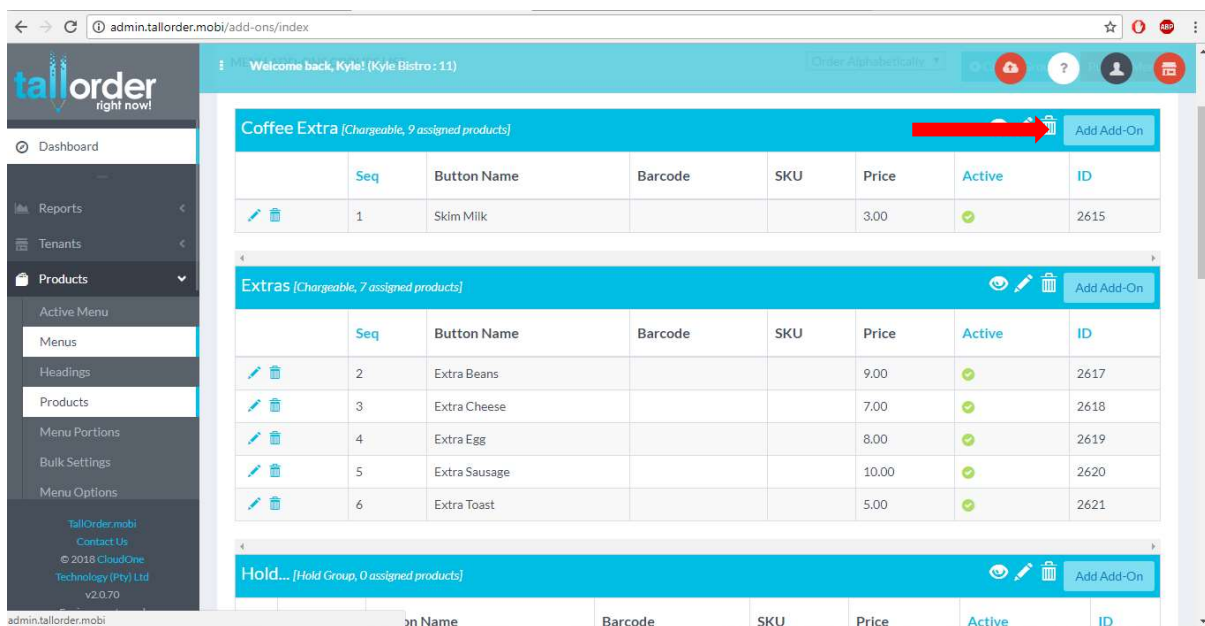
Select the respective product from the drop down list by clicking on 'Select a Product':

Lastly, you will need to assign the entire Add-On group and the respective Add-Ons to the respective products or menu items – To assign the group, simply click on the "eye" icon:
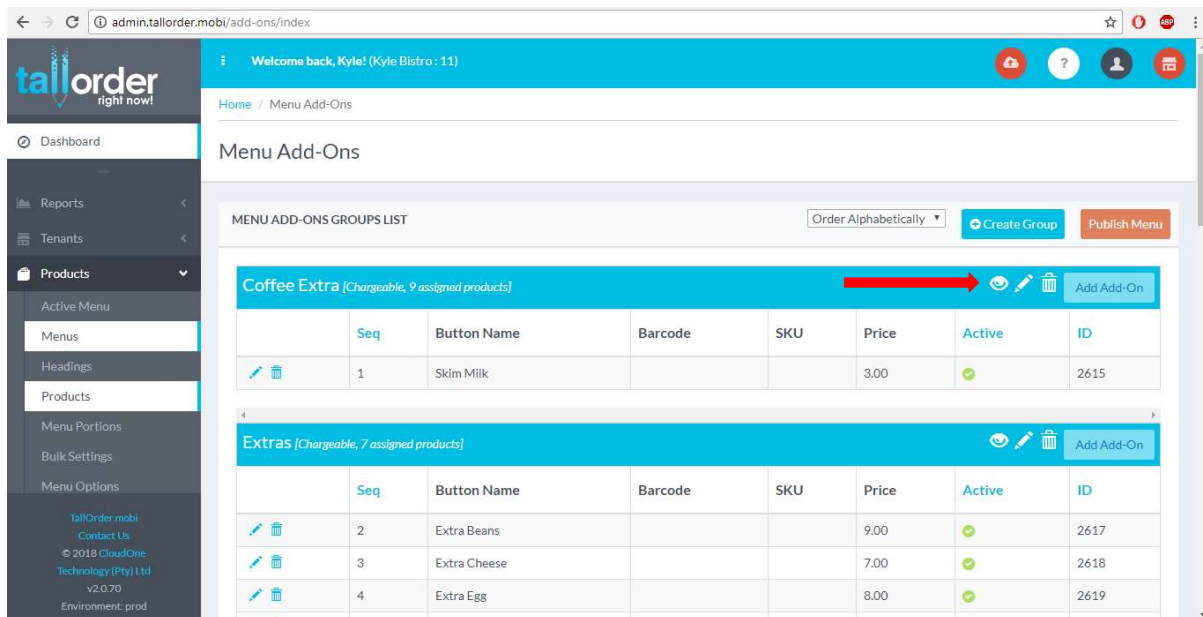
Next, click the "Add" button and it drops down your product list – from here you will be able to tick the boxes for the respective products you want to assign the Option Group to:
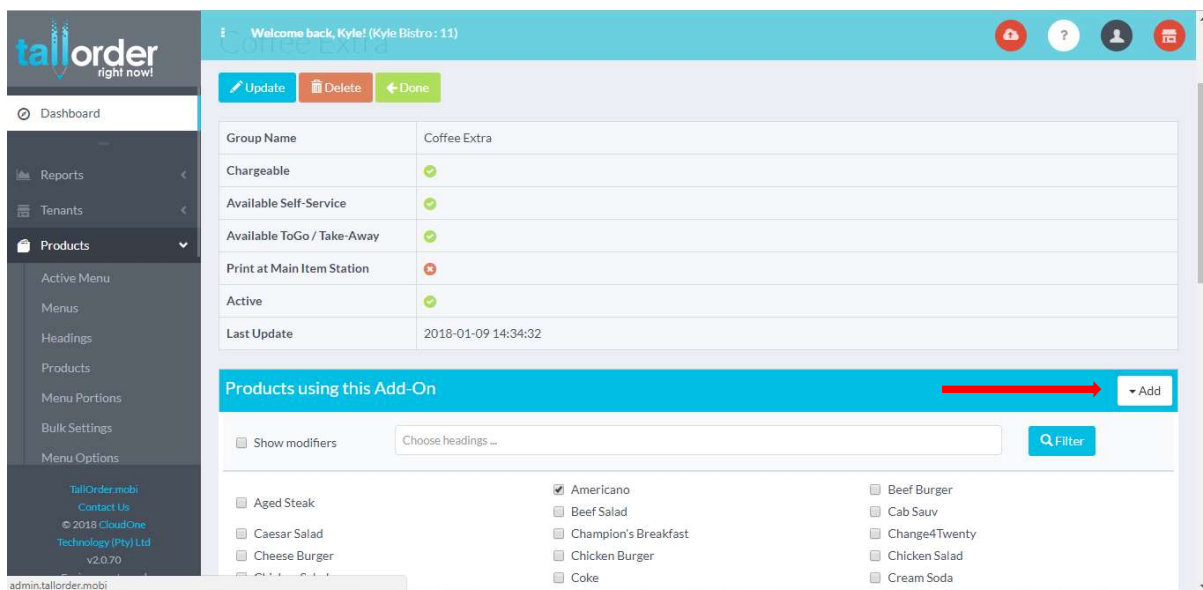
2.9.   Customizing the Active Menu / Product List:

In order for the product items or menu items to be active, it needs to be added to the Active Menu Tree. By now, you will have completed adding all of your Products, Add-Ons, Options & Departments.

Click on 'Products' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Products'. To begin designing the layout of your menu or product list, click on 'Active Menu' and then select 'Headings' on the right hand side of the dashboard:
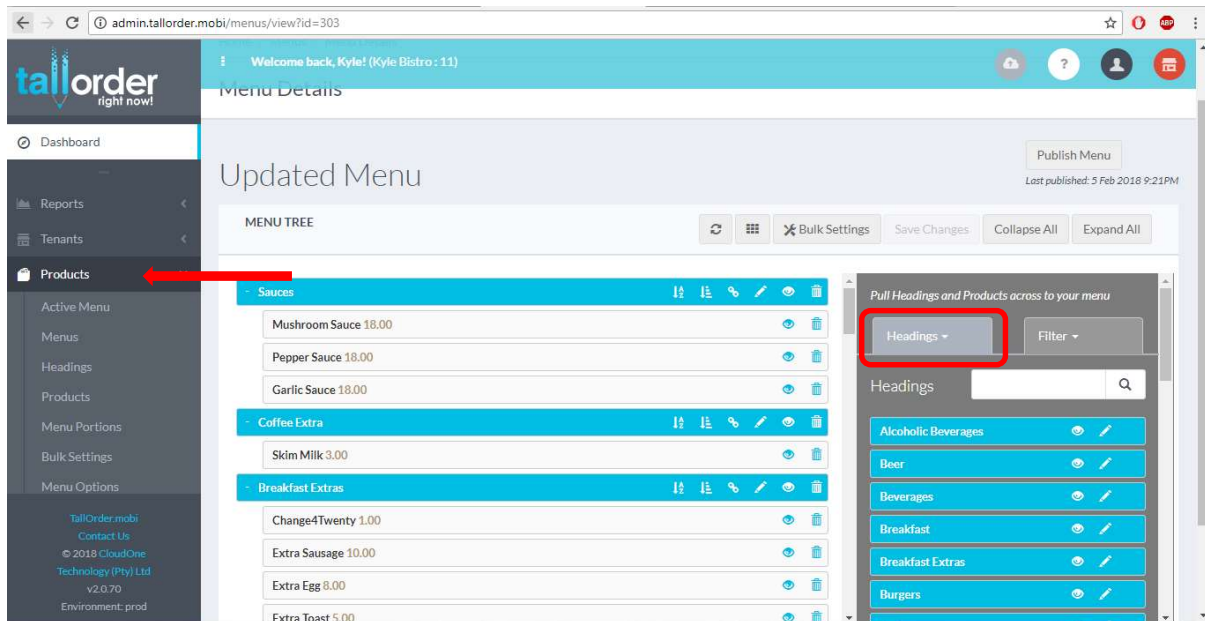
Drag and drop all your Headings into the Menu Tree. You can add Sub-Headings in the respective Heading by dragging the Sub-Heading in the main Heading and indenting the Sub-Heading.

Once you have laid out all of your Headings and Sub-Headings, click 'Save Changes':
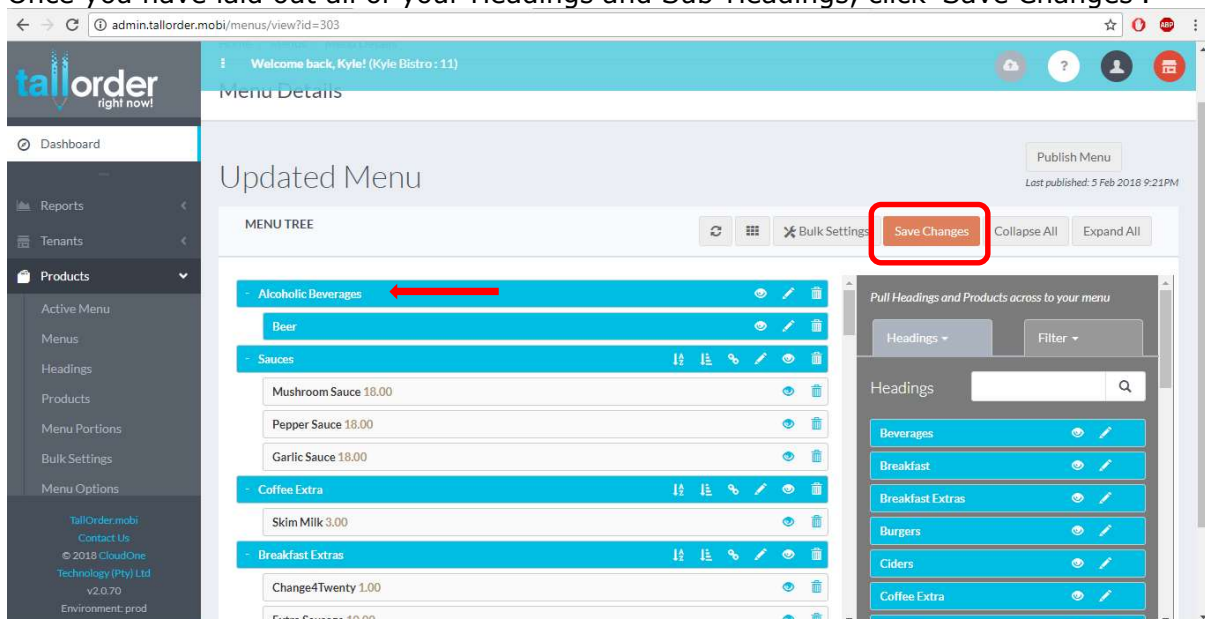

You can rearrange the Headings in an order you feel is best suited for your business and POS navigation.

After adding your Headings & Sub-Headings, refresh/reload your browser. This will allow you to make use of the Bulk assignment of the product items to the Headings.

Click on the 'Headings' tab again to display your list of created products – these products are not active in the Menu Tree.

Click on the 'Add-to' tab – this will drop down your respective Headings that you have inserted into the Active Menu Tree:
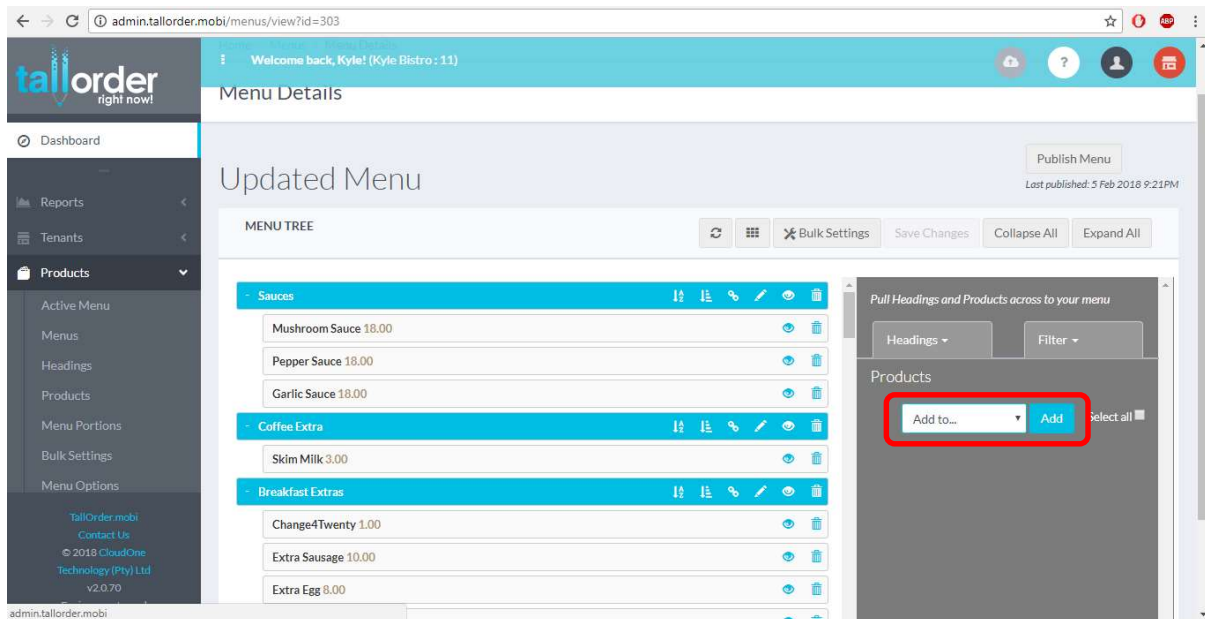
Select a Heading that you want to work with. From here you will tick the box of the respective product from the list below that you want to add to the Heading:
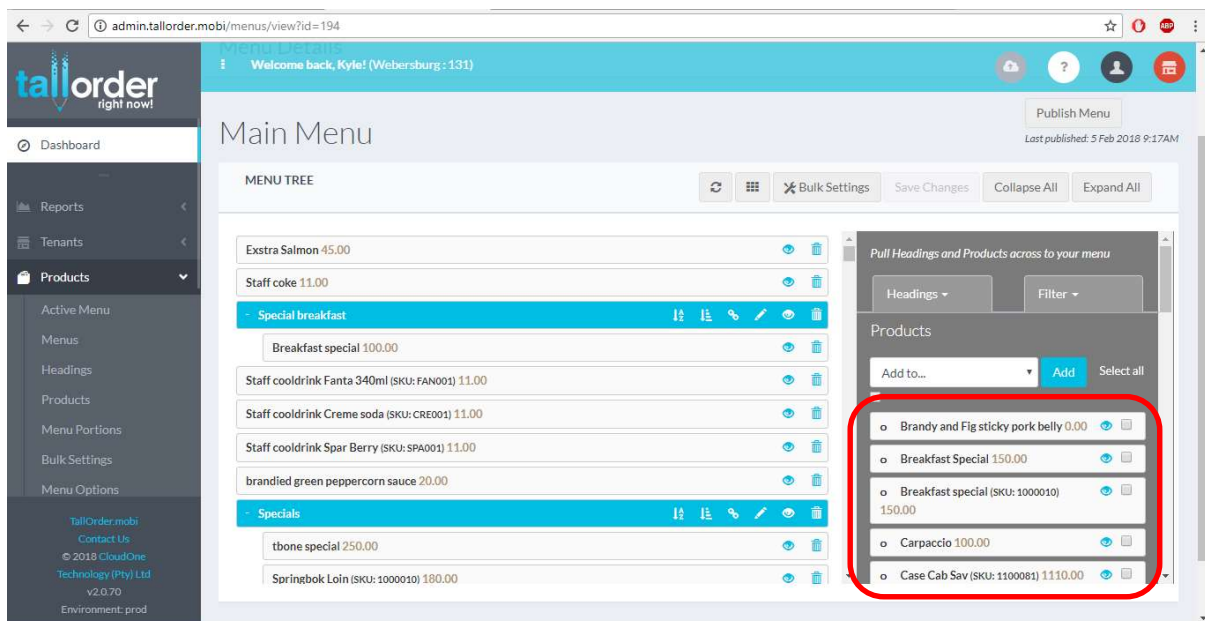
Once you have finished selecting the respective products, simply click the Blue 'Add' button and all the respective selected products will be added to the chosen Heading in the Active Menu Tree.

Keep repeating until complete with your active menu.

NOTE: You are able to work in the product list and Active Menu without it affecting the TallOrder POS until you push the changes to the TallOrder POS, and the TallOrder POS retrieves the info from the Cloud.

NOTE: When you have made the respective changes, and want to push the changes to the TallOrder POS, simply click on Publish Menu or select the Cloud Icon – The changes will then be pushed to the TallOrder POS but not yet be updated:
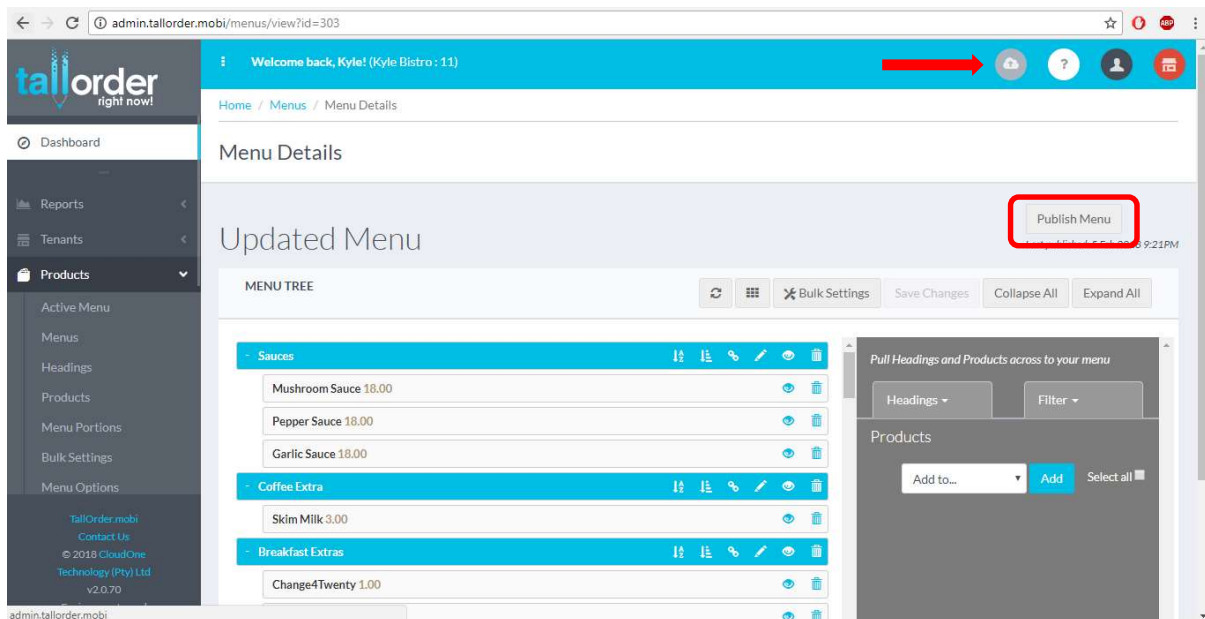
2.10.   Import Wizard

TallOrder has an intelligent Import Wizard that is accompanied by our template that can be used to add your products or menu items. The entire menu design can be compiled in the template and the relevant details for the products can be inserted.

You will find the Import Wizard within the 'Products' Tab. You will be able to download an XLSX Sample or CSV Version:
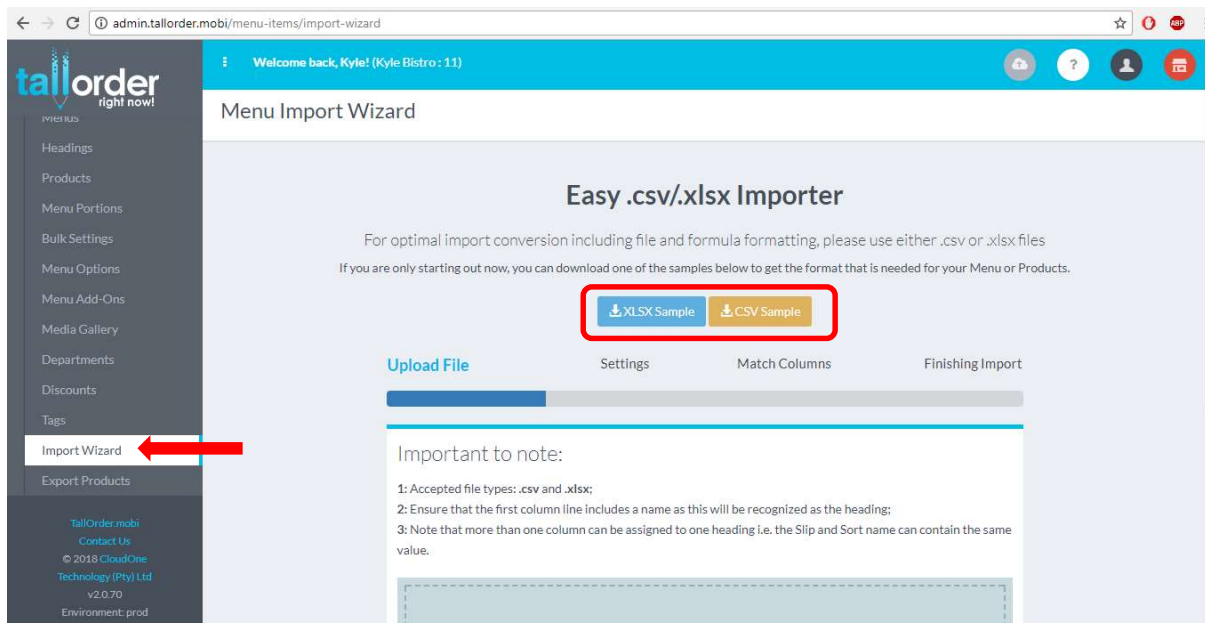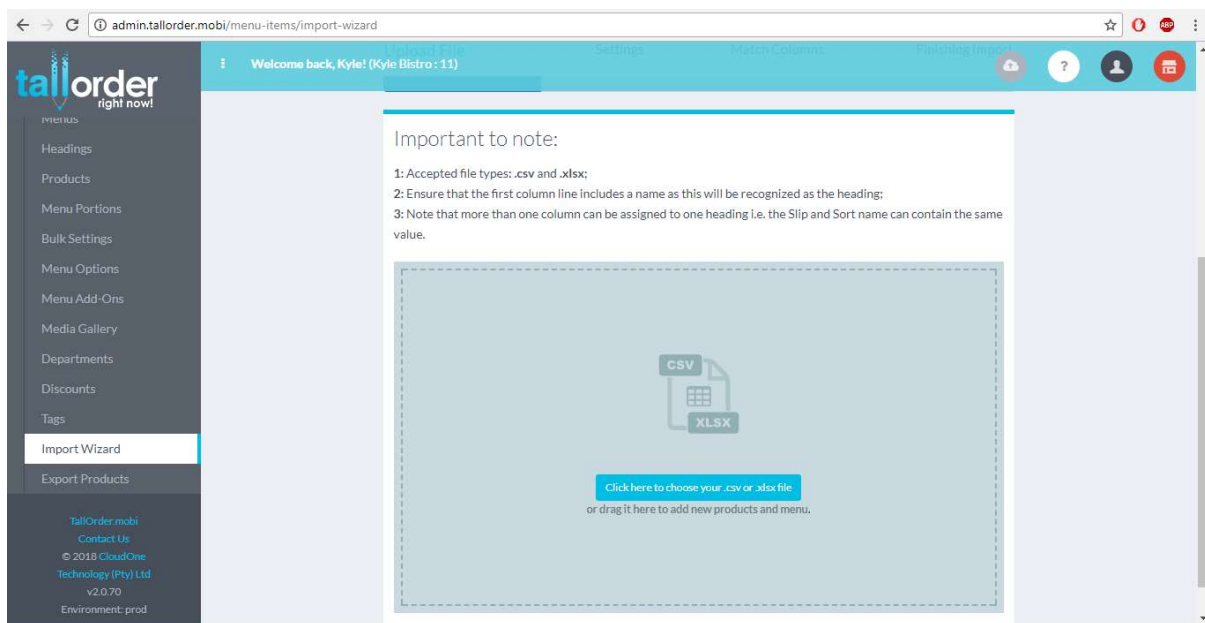

Downloading the XLSX Sample:
When downloading the initial template, you will be presented with info in the first line that serves as a guideline when adding your products to the template:
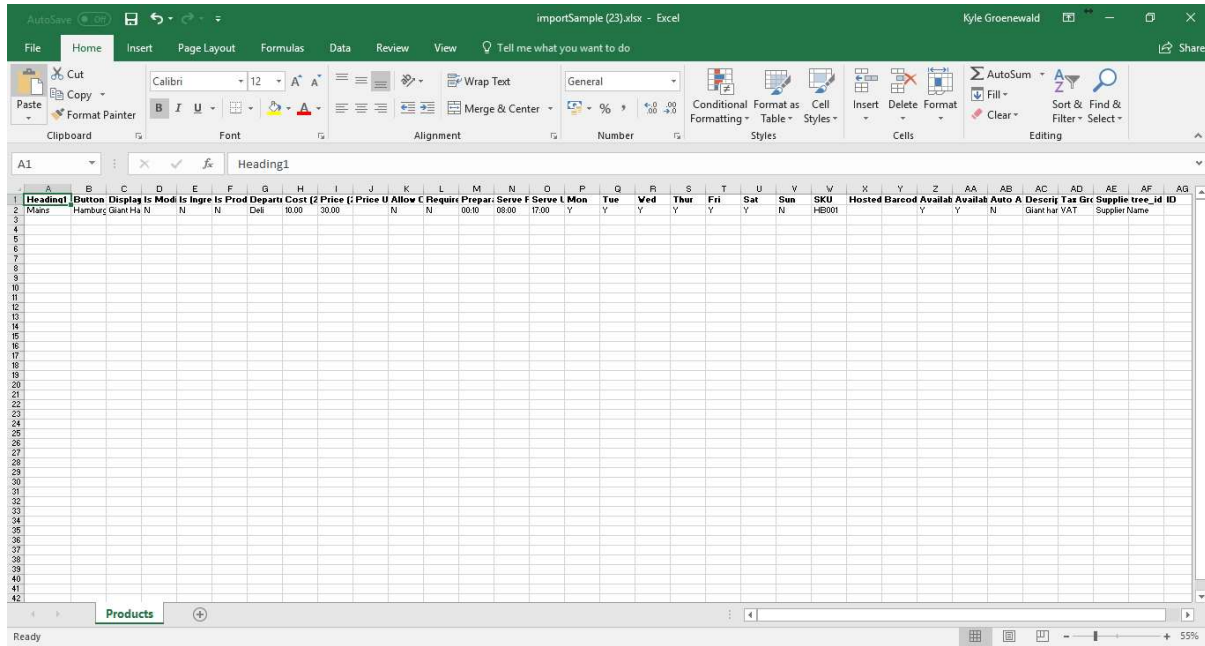
Once you have inserted all of your respective products, you can save the XLSX file to your PC and then simply upload or drop the XLSX file into the Uploader as seen below:

Once you have uploaded your file for import you will be presented with some easy steps to follow - this is dependent on whether you are importing a new menu or updating an existing menu.
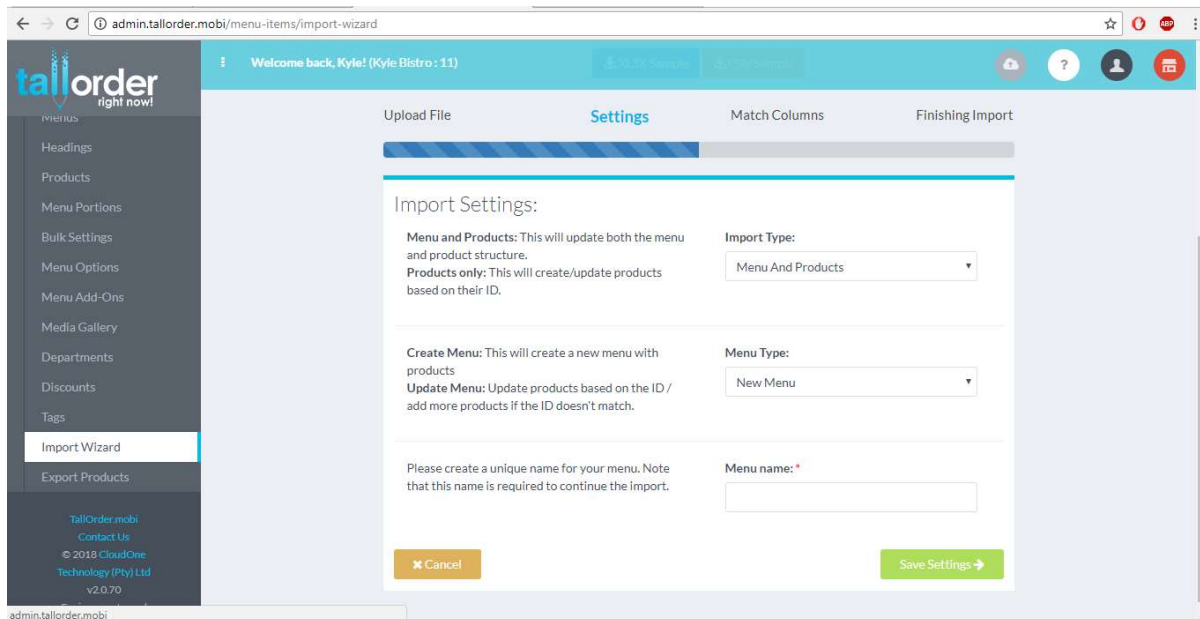
Once you have selected your preferred fields, simply click 'Save Settings' in the bottom right hand corner and you will be taken to the next window to confirm your respective fields – Once confirmed, simply click on 'Start Import'.

The import will process and provide a notification if the import was successful or if it has failed.

2.11.   Exporting the Product List:

When you want to update your product list by adding new products, headings and simply editing existing products, you can use the export function – you can Export the Menu Layout (as in the Menu Layout in the TallOrder POS) or Alphabetical list of the products:
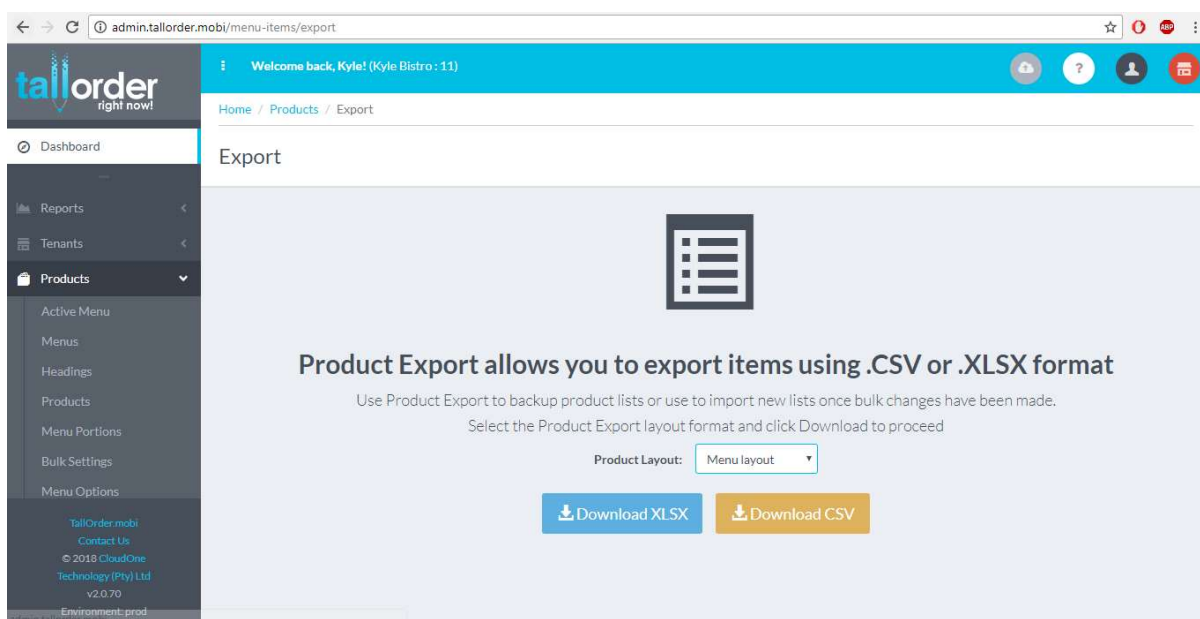
Once the export is complete, edit the products in the exported template, save the template and re-import the template. In this case, you will select 'Update Menu' in the 'Menu Type' field.

3. Inventory Settings:
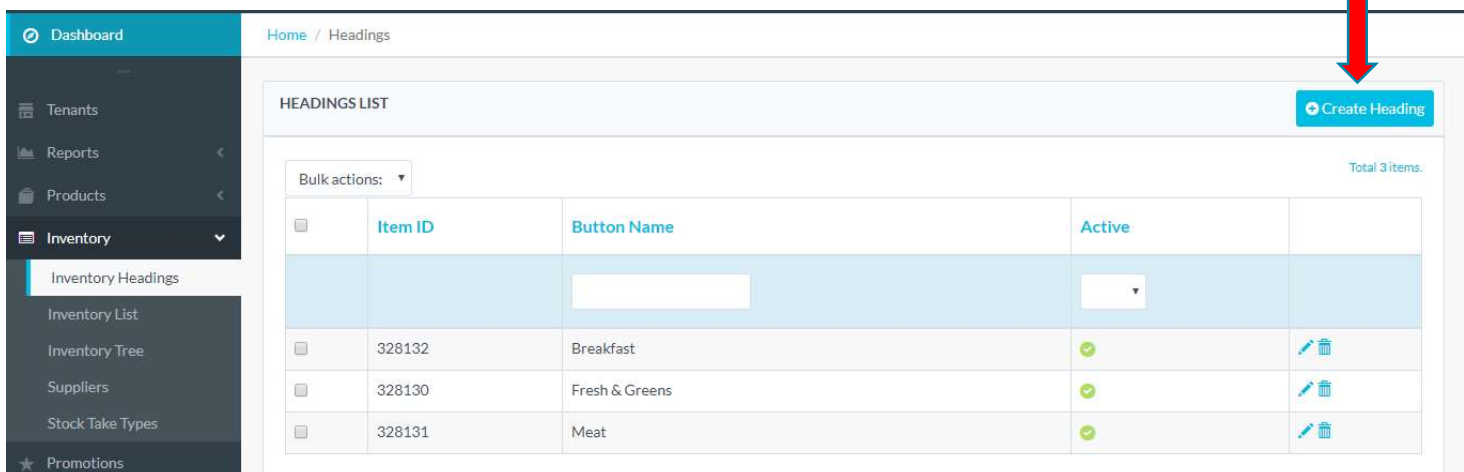
Inventory refers to items that you buy from suppliers. Your Inventory items/ stock can be products you sell directly to your customers or they can be a part of recipes that you sell. Ie. You need to order a certain amount of beef patties and buns to be able to sell Burgers.

3.1. How to enable Inventory on Admin

- Log into your tenant (relevant video available)
- Select Settings on the left-hand side navigation
- Select Tenant Settings
- Select Update
- Select Use Stock Control and other relevant stock control and you will have inventory available to you to use. It will be on the POS and Admin

3.2. Setting up your Inventory Headings:

- On TallOrder Admin, click on the "Inventory" tab on the left, then click on "Inventory Headings".
- You can now add Inventory Headings by clicking on the "Create Heading" button on the right.
- You can also edit heading by clicking pencil icon on the right of the heading.
- To delete a Heading click on the Trash icon on the right of the heading.

3.3. Setting up your Inventory list

- On TallOrder Admin, click on the "Inventory" tab on the left and then click on "Inventory list".

- You will be presented a list of your Inventory. To edit the details of each product within your Inventory, click on the eye icon on each product next to each product.

- This will open a window displaying the product details to view.
- To edit, click on the "Update" button on the right.
- Next, update the cost per base unit to continue.
- In this section, you can also change the Reorder levels and set alerts to remind you of when you are running out of a certain product.
- You can also choose our ordering value (it recommends which value to use for certain products.)

3.4.   Setting up the Inventory Tree:

- On TallOrder Admin, click on the "Inventory" tab on the left and then click on "Inventory Tree".
- Here, your menu layout can replicate your active menu.
- You can drag Headings (and the products under that heading) from your active menu to your Inventory list.
- Note that headings and Items refer to stock items and this is where can add and edit heading and items here. Simply drag your items to your Inventory Tree from your active menu. Remember to Save Changes.
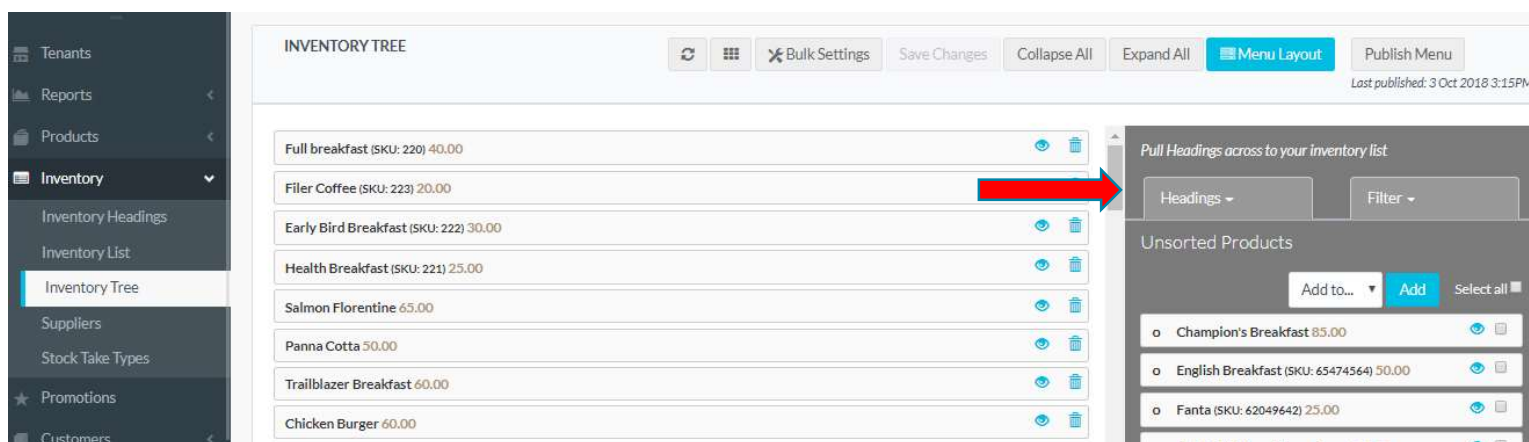
3.5.   Setting up Inventory Suppliers:

- On TallOrder Admin, click on the "Inventory" tab on the left and then click on "Suppliers".
- "Create Supplier" button on the right.
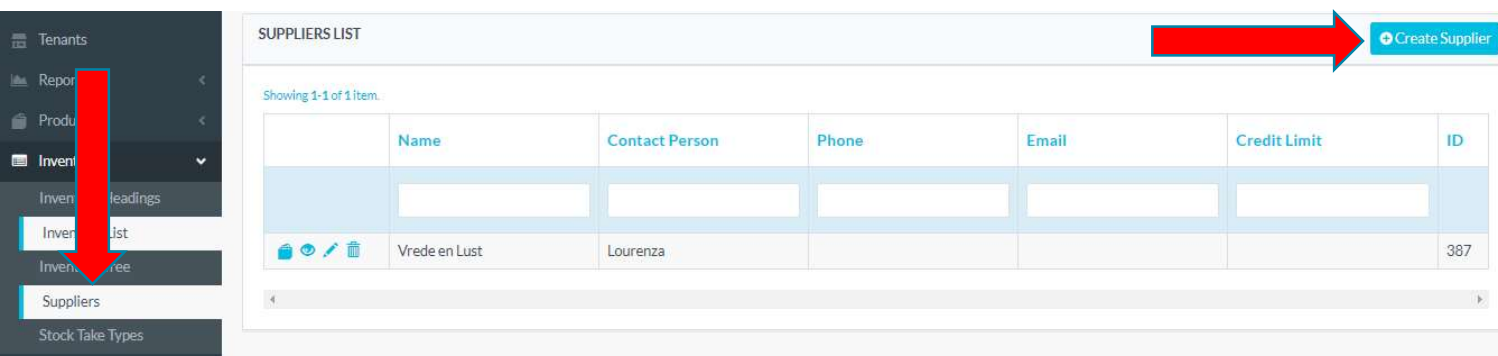
- In order to create a new Supplier click on the "Create Supplier" button - fill in the details for the supplier-> Then click on the "Create" button at the bottom.

- Click on the "Shopping Bag" icon next to a Supplier name.

- Click on the blue "Assign Product" button on the right- it will open the tab so that you can choose which product to assign.

- You will be redirected to an Assign Product window and can select products to assign to that specific Supplier by clicking in the drop down box. When you have filled in the details of the assigned product click "Create."

- You can also bulk assign products to a specific supplier by clicking on the orange "Bulk Assign Products" button on the right.

- You will be redirected to an Assign Product window you can then select a number of products.
- When you have selected all the products you would like to assign to that specific supplier click the "Continue" button on the right.

- You will then be given the option to select the value of the various products. When you have done so click "Save".

4. Promotions

1. HOW TO ENABLE PROMOTIOINS ON ADMIN

- On the TallOrder Admin Dashboard, click on "Promotions" on the left-hand side of the Dasboard. You will be redirected to the Promotions tab.
- On the right you will find a "Add Promotion" button.
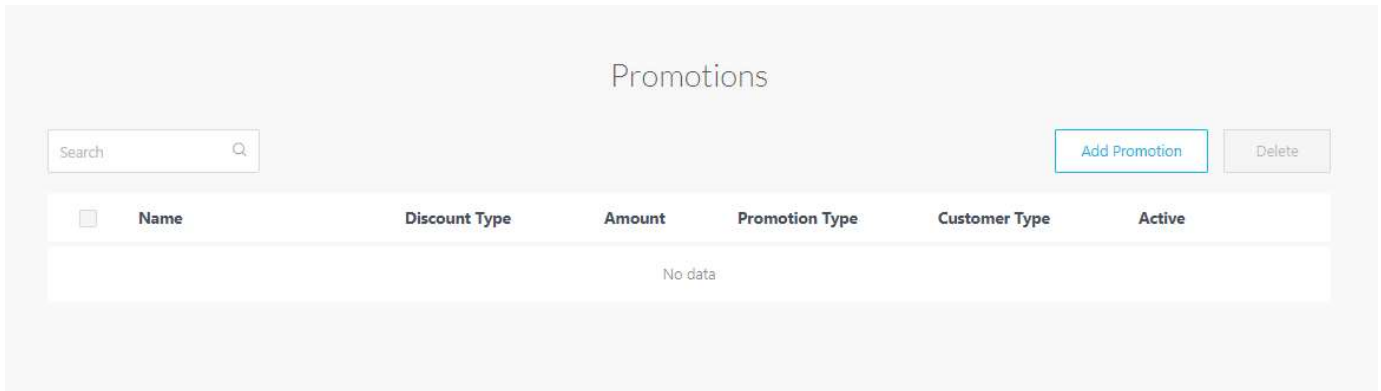
- This will open an "Add Promotion window" in which you can create a header for your promotion and customise your promotion.
- In this window you can decide which type of discount you would like to apply as well as the amount of discount you would like to apply.
- You can also decide on the parameters of when you can apply the promotion. Ie. After how many products ordered or total amount spent on products.

- You can also customise the day and time of when the promotion will available for, as well as the days of the week that the promotion applies to.

- You can also adjust to which "Customer Type" the promotion apply to and create a new "Customer Type" if you need to.

- You can also apply the promotion to take-aways only
- You can also apply the promotion to all products.
- Or allocate the promotion according to a specific department. i.e Lunch products. Or by promotional tag that you can set to match specific products.
- Once you have applied the relevant modifiers you can click "Save".

5. Customer Settings

5.1.   How to Add Customers to the Customer Database:

- TallOrder allows you to add Customers into a Customer Database. This database allows you to use the MailChimp integration to send targeted email campaigns to specific customers. This database also allows you to use our Loyalty feature (which will be discussed later in the manual.)
- On TallOrder Admin, click on the "Customers" tab on the left and then click on "Customers".
- To add a new customer, click on the "Add Customer" button on the right.

- You will be redirected to an "Add Customer" window and you will have to fill in the customers details.

Add Customer

Personal Information

* First Name:

Last Name:

* E-mail:

Phone Number:

Country:

City:

CLOSE   SAVE

- You can also select a specific Customers type so that you can put customers in specific categories and set up specific account information for specific customers.
- Once you have filled in the correct information for the customer click "Save"

Customer Type

Select or add a customer type ⓘ:

+

Account Information

Credit Limit:

0

Additional Addresses

New Address

CLOSE   SAVE

5.2.   How to Enable Loyalty settings

- On TallOrder Admin, click on the "Customers" tab on the left and then click on "Loyalty". You will be redirected to a window in which you can select "Yes" to enable Loyalty.

- Here you can customise your Loyalty Programmes, such as the name, value and duration.
- You can also customise whether you will make use of Loyalty Tiers.
- Once you have filled in all the Loyalty details click the "Save" button.
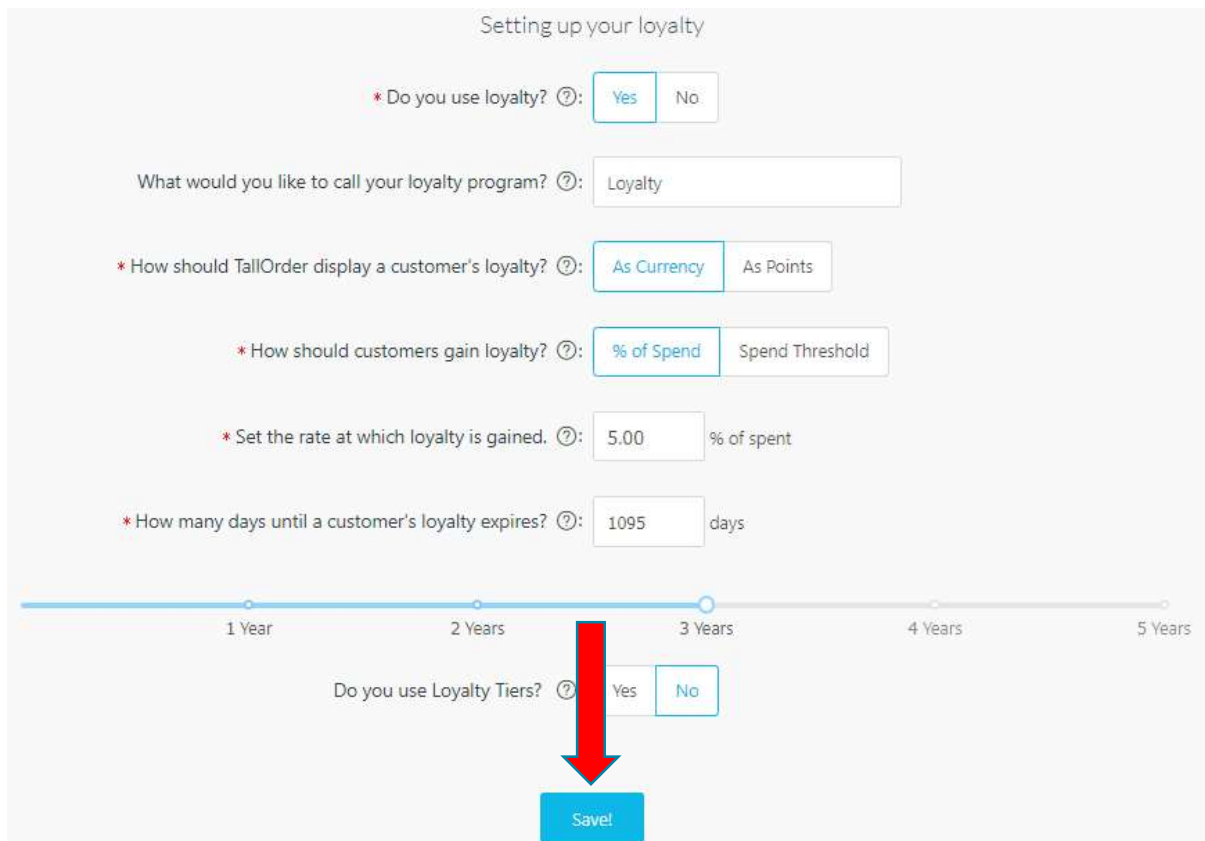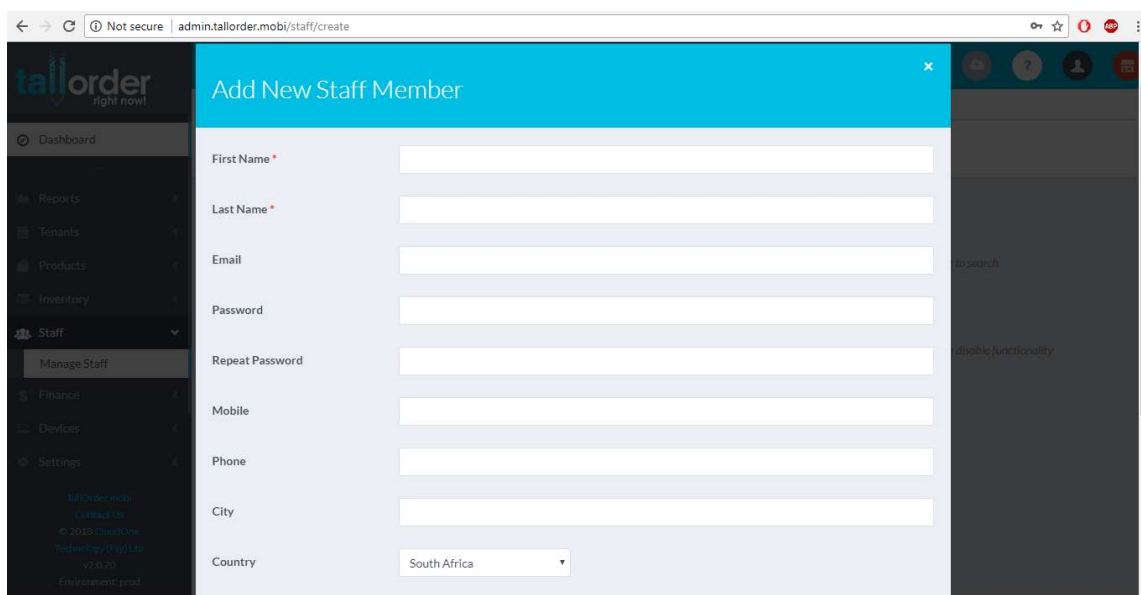
6. Staff Settings
6.1.   Adding Staff Members:

You can add & edit staff members with ease – you can set up staff members as normal staff with limited permissions and you can set up managers with a Manager PIN for voids, discounts & authorization.

- Click on 'Staff' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Staff' Select 'Staff'. Select 'Manage Staff':
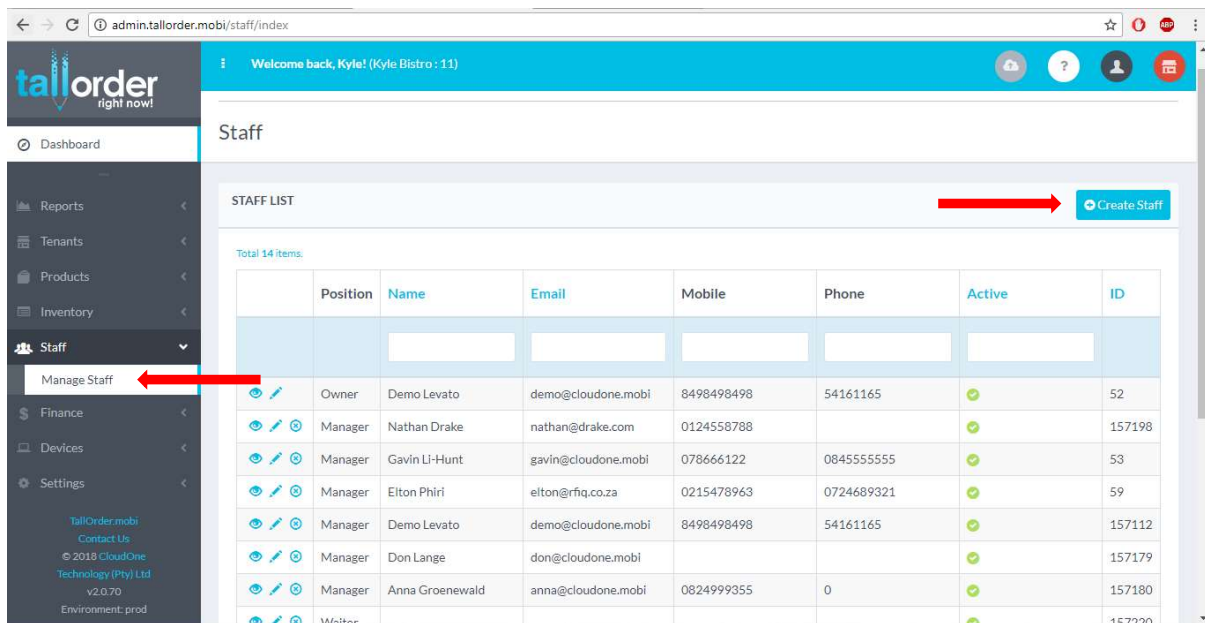
- Click on 'Create Staff' and then 'Add New Staff Member' and complete the respective fields provided to create a profile for the user:

- Once complete you can assign a Staff Pin (4 Digits) for normal users – When selecting Manager, assign a Staff Pin & Manager Pin (6 Digits):
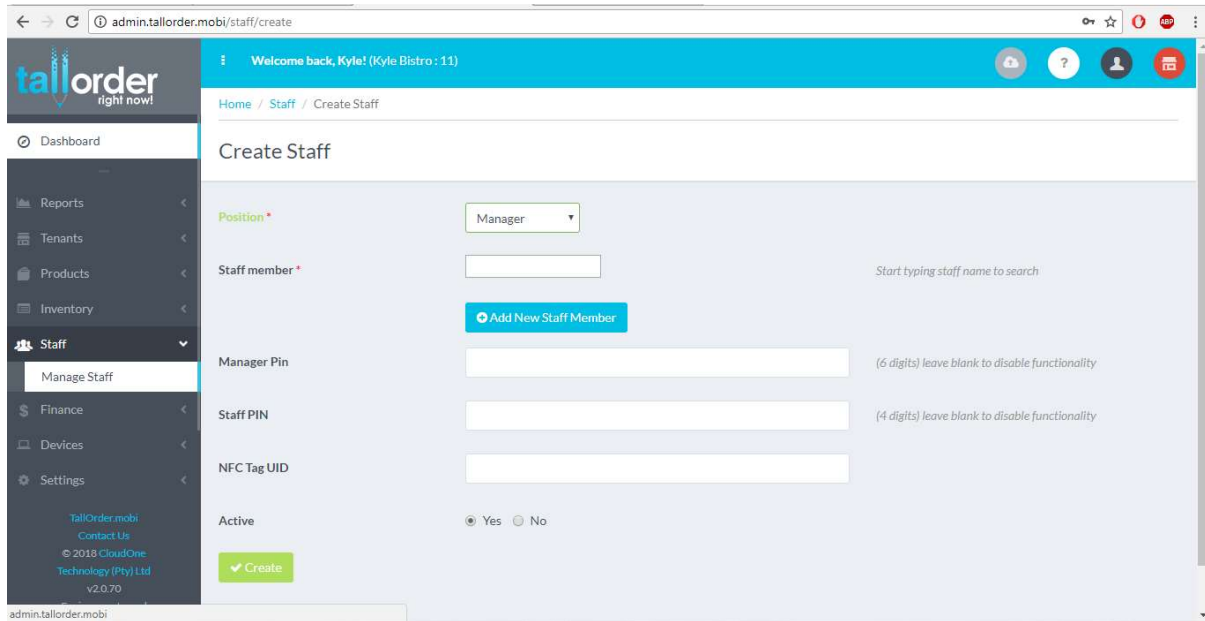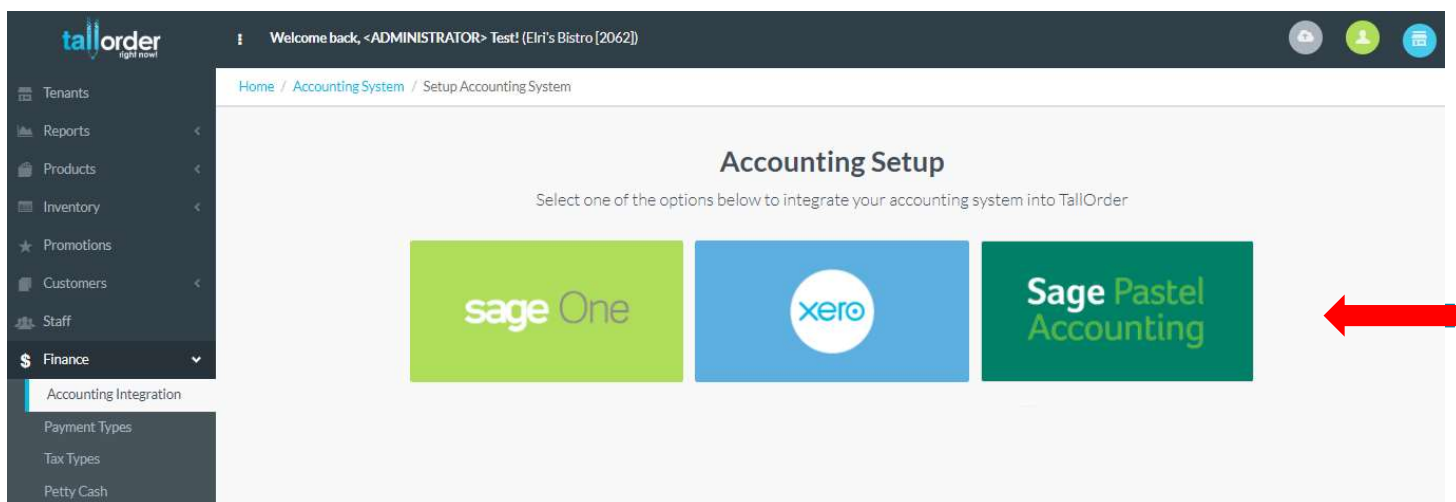
7. Finance Settings

TallOrder is integrated with SageOne, Sage Pastel Accounting and XERO. You can perform the Accounting Intergration Setup from the TallOrder Admin Dashboard.

7.1.   Accounting Integration:

- On TallOrder Admin, click on the "Finance" tab on the left and then click on "Accounting Integration."

7.1.1. Sage Integration Setup

NOTE: If you have not yet done so, you can sign up for your Sage One and Pastel account at https://www.sageone.co.za/. Once you have set this up, you can utilize the Sage portal to help you get set up. Your Sage credentials can be used to validate your Sage Integration in the TallOrder admin.

- Choose either the SageOne or Sage Pastel Accounting depending on which Sage package you are currently using.
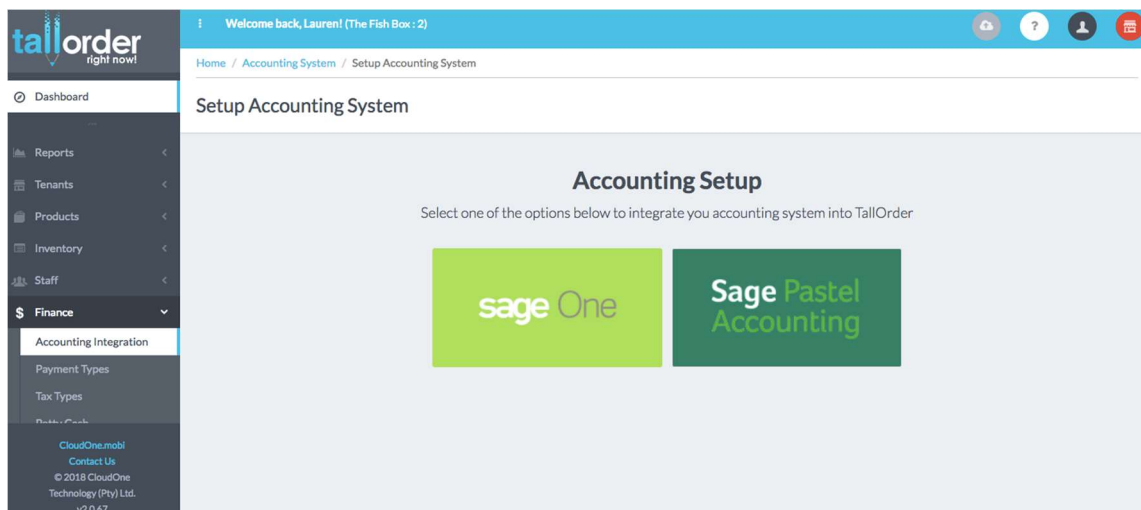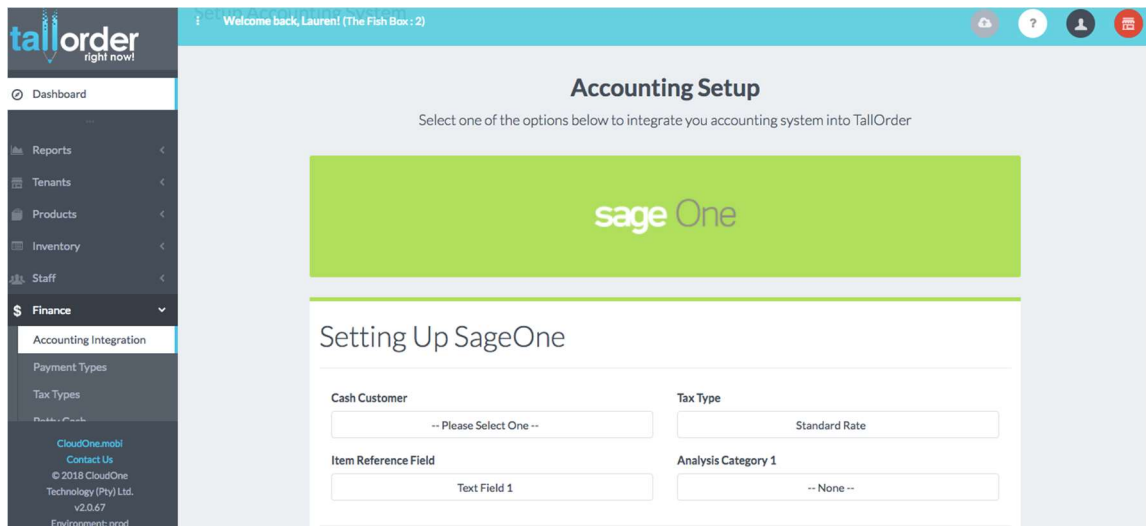

7.1.2. Setting up SageOne:

- Please click on the SageOne button.
- Here you must use your SageOne login details for the relevant information to be integrated with TallOrder.
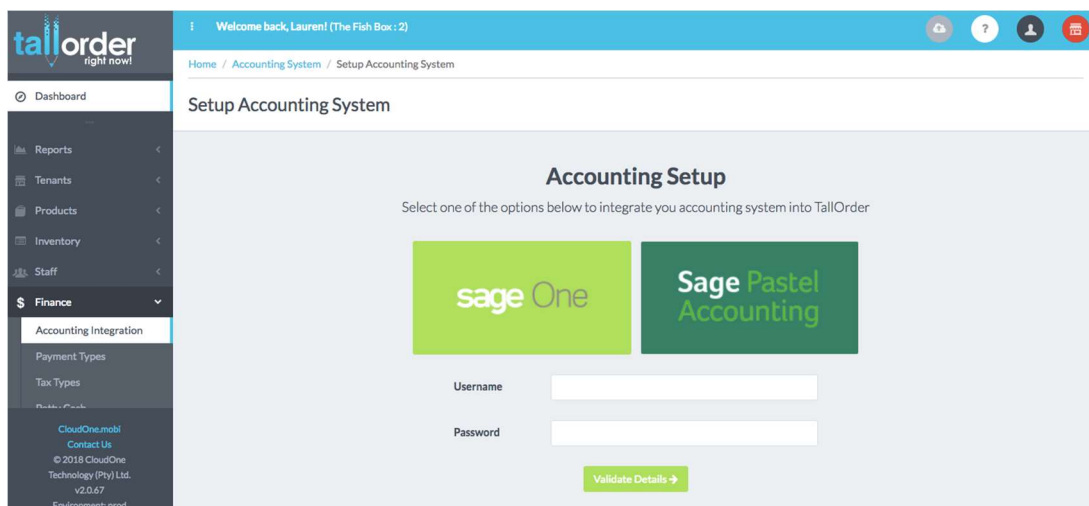
- Once you have added your login details*, please validate.
- You will then be presented with a setup page, where you can fill out basic accounting details to create your SageOne account within TallOrder.

- **Customer Account Types:**
- There are different types of customer accounts one can set up in Sage directly that will integrate with TallOrder. All the above customer accounts need to be set

up in the Sage portal FIRST, before it will reflect within the Sage integration on the TallOrder Admin.

- Please ensure that the following sections have been added to Sage for it to reflect in the TallOrder admin: a TallOrder cash customer, a TallOrder bank account, TallOrder mobile payments such as SnapScan and YoCo account, TallOrder petty cash and TallOrder gratuity accounts. (this will change depending on what you offer).

Example: Cash Customer Setup:

- To complete setup for a cash customer setup, please fill in the following: cash customer, tax type, references field, analysis category, SageOne task management. Then select the Accounts from SageOne that link to your payment accounts, where you must select the account for payment type.
- Note: if you do not use tax, please deactivate within your Sage account.
- Once complete, click on 'Create SageOne Account' to proceed.

- You will then be presented with a confirmation message, and from there, you will be reminded to Sync your account. From here, you can sync items customers and suppliers.
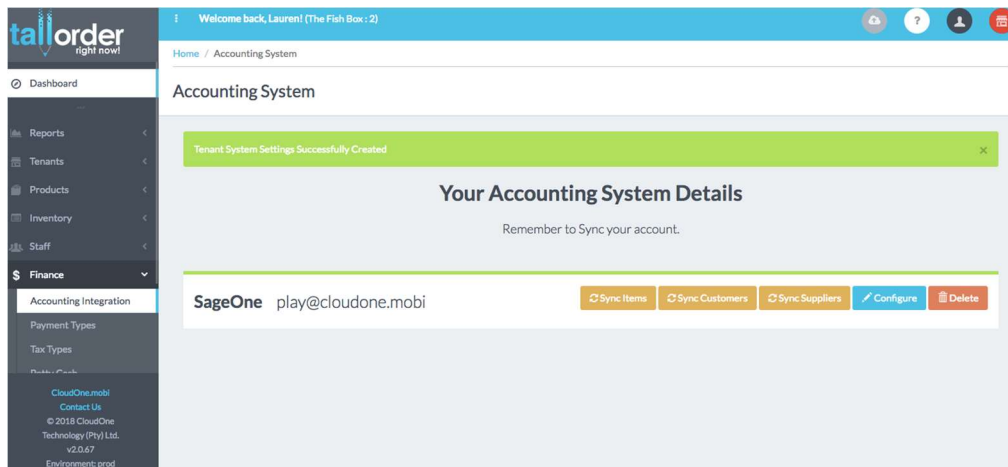

- If you would like to change account details after syncing, click on configure, which will take you back to the previous page.
- Now you can set up for the remaining customer accounts.
- Once all customer accounts are complete, you have successfully set up your Sage accounting details within the TallOrder integration portal!

7.1.3. Setting up Sage Pastel:

- Please click on the Sage Pastel Accounting button.
- You must give information such as your financial year, email address and CSV download information to create your Pastel Account. As Pastel is not a Cloud solution, TallOrder can deliver the CSV download straight to your email account on a daily or weekly basis.
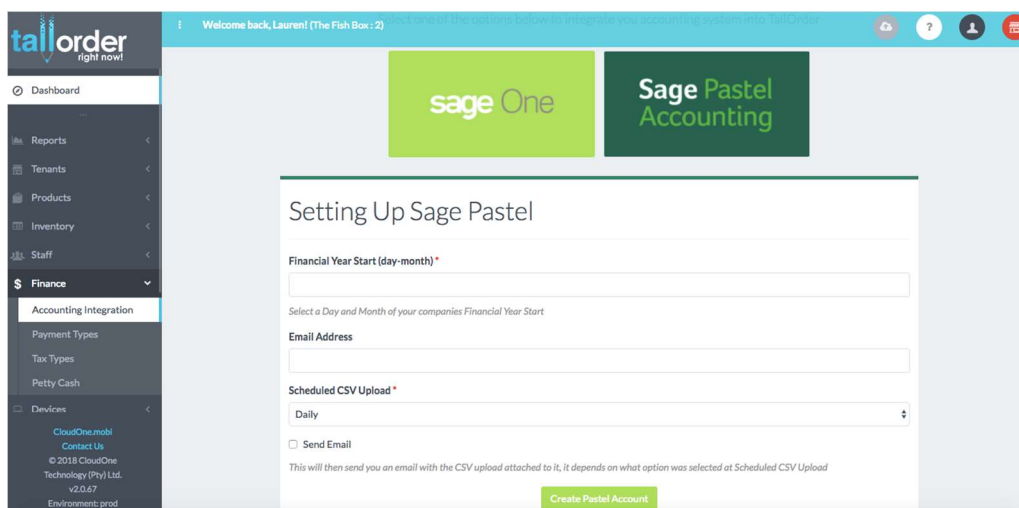
- Once you have added these details, please create your Pastel account.
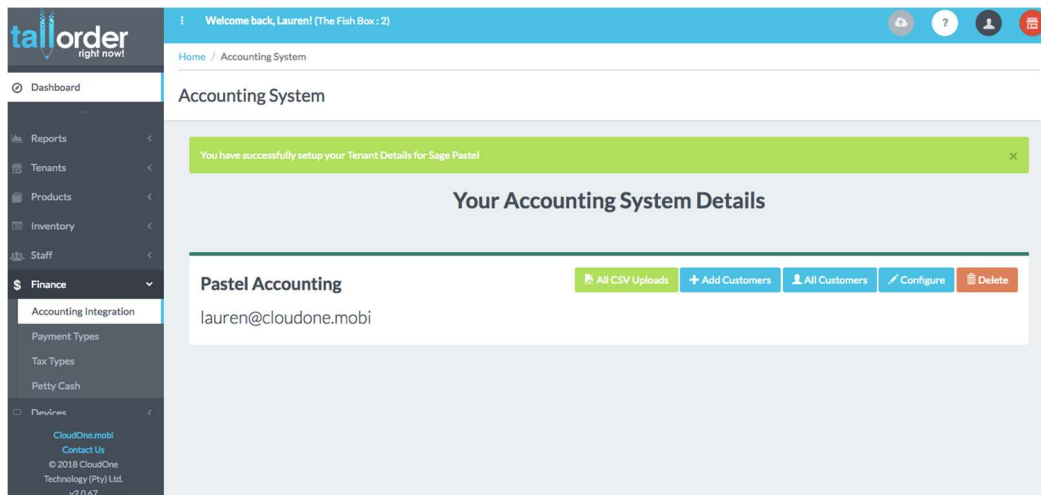
- Once you have created your account, you can now Add Customers.


- Note that when you fill out the form above, you will need to know the Pastel Customer Code for each customer. The customer code and the order number will both be provided to you once you have set up your account on Sage.
- Once you have filled out the relevant information (using details from your Sage setup) you have successfully set up your Pastel Customer.

Product Setup for Sage Pastel:

- When setting up your accounting with Sage Pastel, you must set up product information within the TallOrder admin portal. To set up the products in TallOrder for Pastel, please navigate the following steps:

- Go to products (please click Products again in the navigation) and then go to the subheading Create Products.
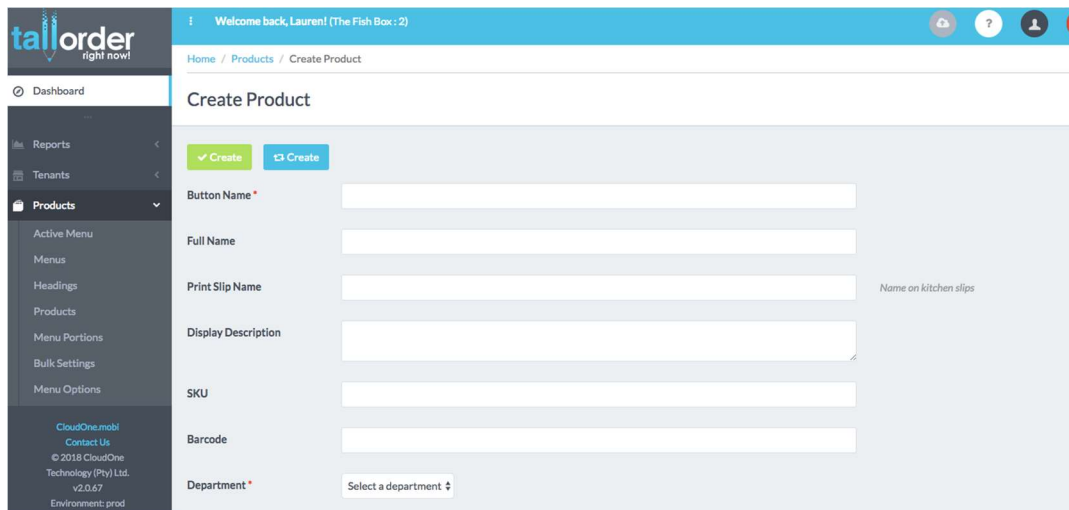
- Fill in your product details including the SKU.
- Once complete, scroll down to Line Type at the bottom of the page. This is under the heading of Pastel Product Info. Please also fill out your Line Type (needed) and Store info (optional) provided by Sage Pastel.
- Once complete, please click on the Create button to proceed.
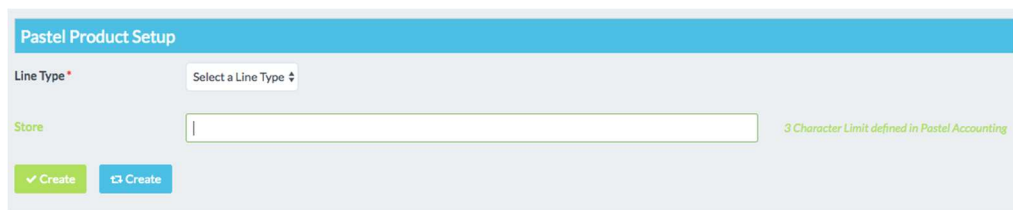
- *Note that other required areas such as Button Name and Price are needed to proceed.

- You will then see the product successfully created in your product list!

7.1.4. Setting up XERO

- Please click on the Xero Accounting button.
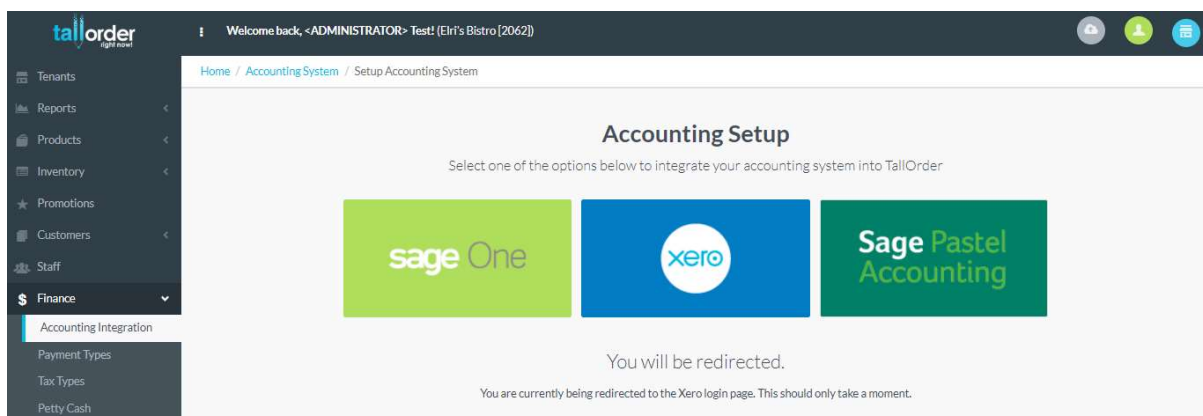
- You will be redirected to the Xero Accounting webpage and asked to verify your Xero Integration by signing into to your Xero Account.

7.2. Payment Types: How to Add a New Payment Type

Payment types can be added, deleted, or simply edited for the TallOrder POS.

Click on 'Finance' on the left hand side of the TallOrder admin Dashboard and it will display a dropdown list of functions related to 'Finance'. Select 'Payment Types':
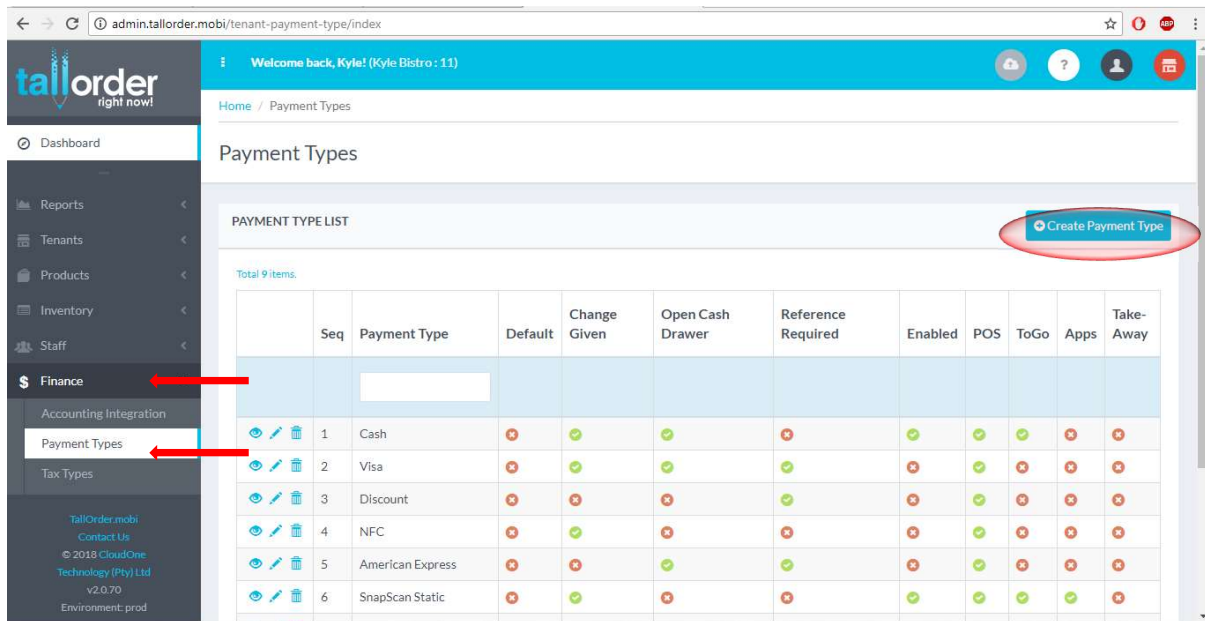
Add new Payment Types by simply clicking on the 'Create Payment Type' tab. You can also Edit an existing Payment Type by clicking on the pencil icon.

When creating or editing the payment type you will be able to select a payment type from our global list of payment types and input the Display that will appear on the TallOrder POS.

You will be able to select specific settings for the Payment Type too – such as, Enabling the payment for TallOrder POS, allow to change payment type and if references are required or not etc.
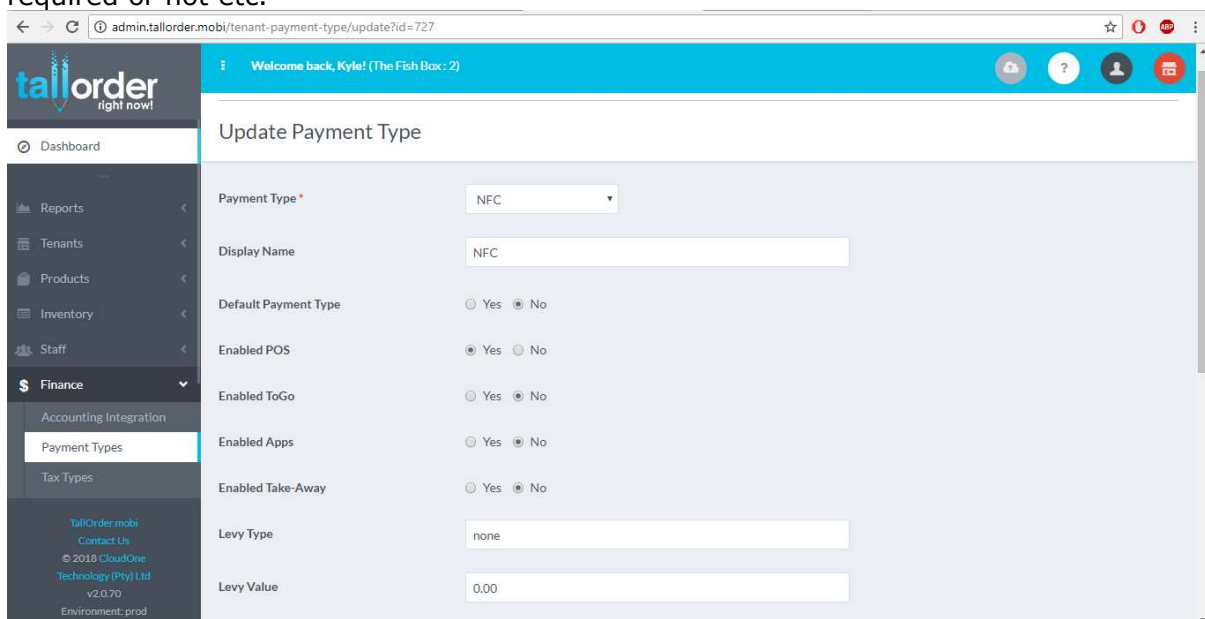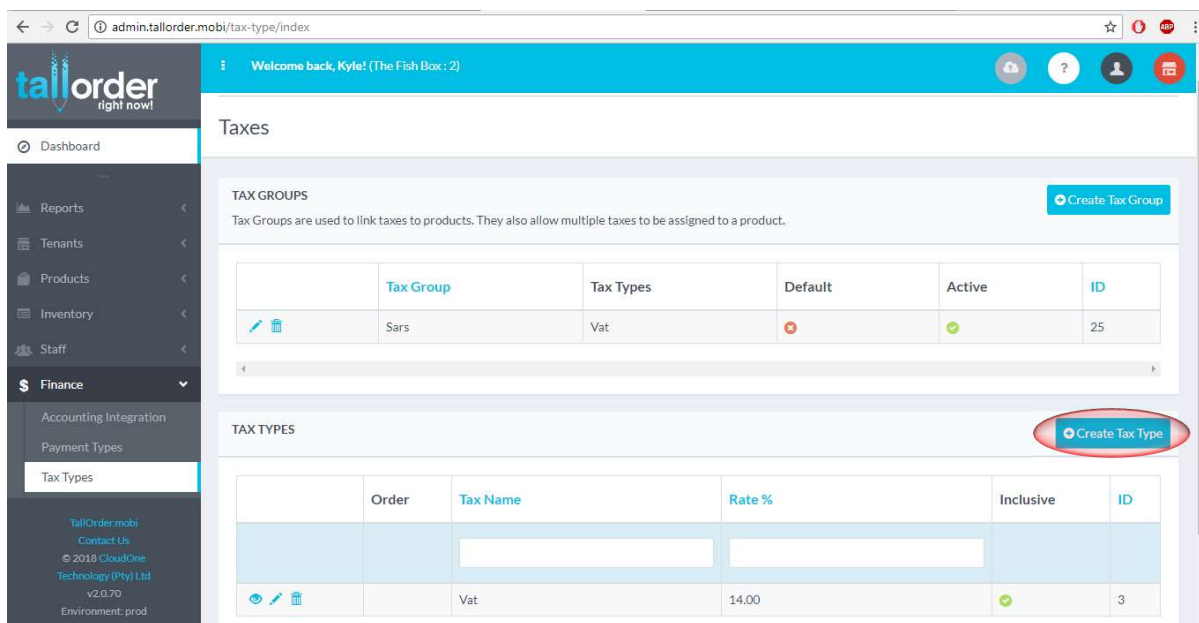
7.3. Tax Types:

Tax Type is an optional step that a user can make use of. If a company does not want to record VAT then there is no need to add a Tax Type.

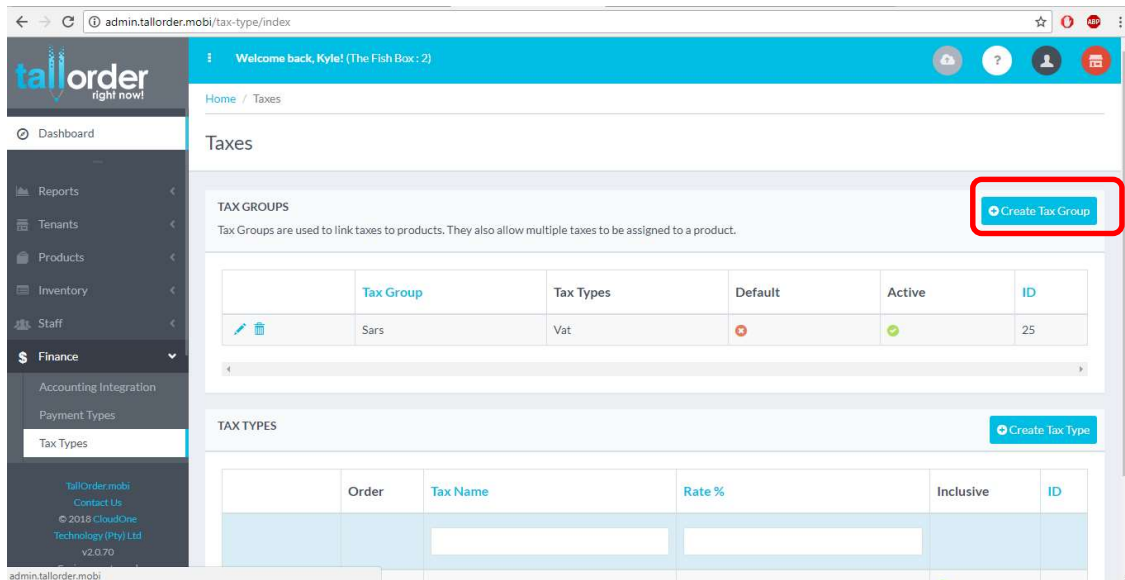Click on 'Tax Types' under the 'Finance' drop down tab.

You can add a respective tax type to display in the TallOrder POS. To add VAT of 14%, click on 'Create Tax Type':
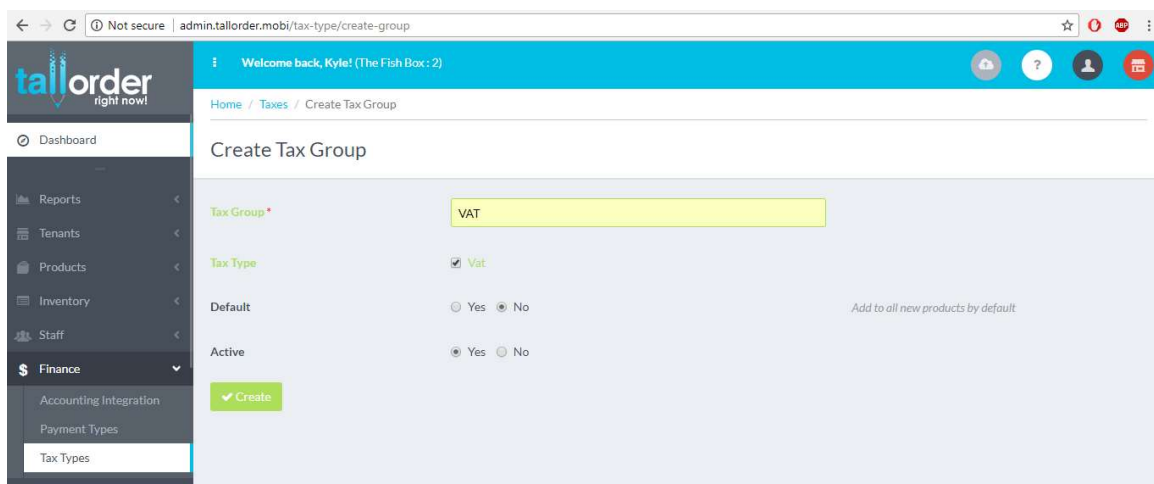

Input the Tax Name (VAT) and Rate % (14%). Next, input the start date – end date can be left blank:
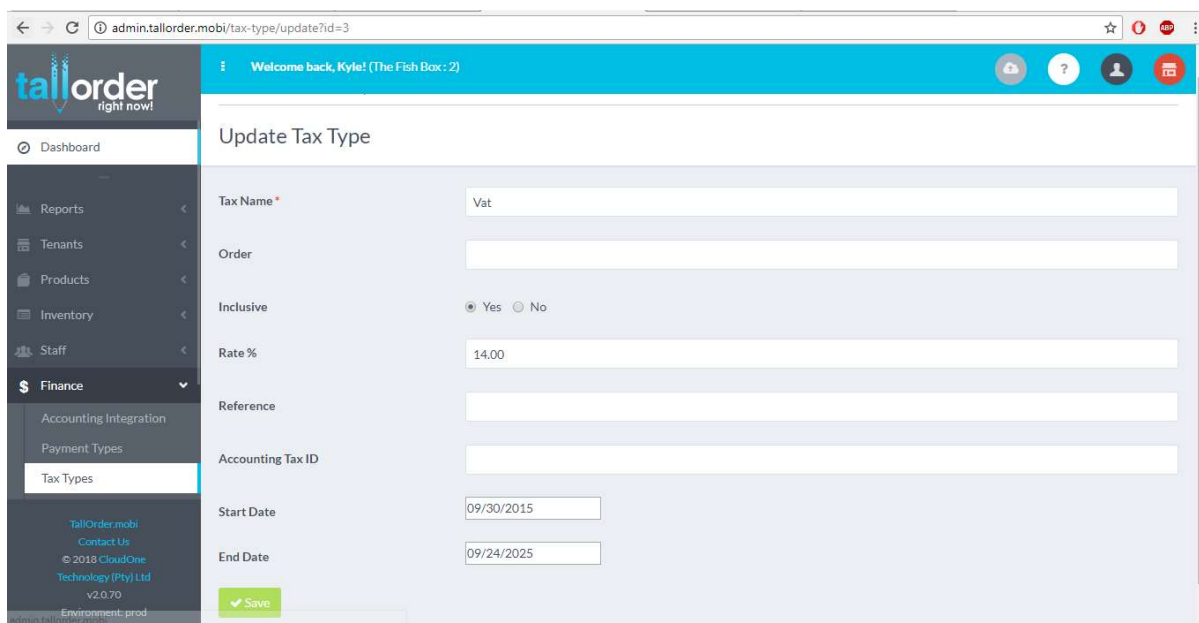
The next step is to add a Tax Group to assign the Tax Type to – Start by clicking on 'Create Tax Group':

Name the Tax Group (VAT) and tick the box "VAT" to assign the VAT Tax type to the Tax Group:

7.4.   Petty Cash:

Petty Cash are respective expenses that are paid from the cash drawer of the TallOrder POS (This is only to be used if a customer makes use of Petty Cash payments).Examples of Petty Cash payments would be Stationery Expenses, Miscellaneous Expenses etc.

To add a petty cash account click 'Add Petty Cash Account':
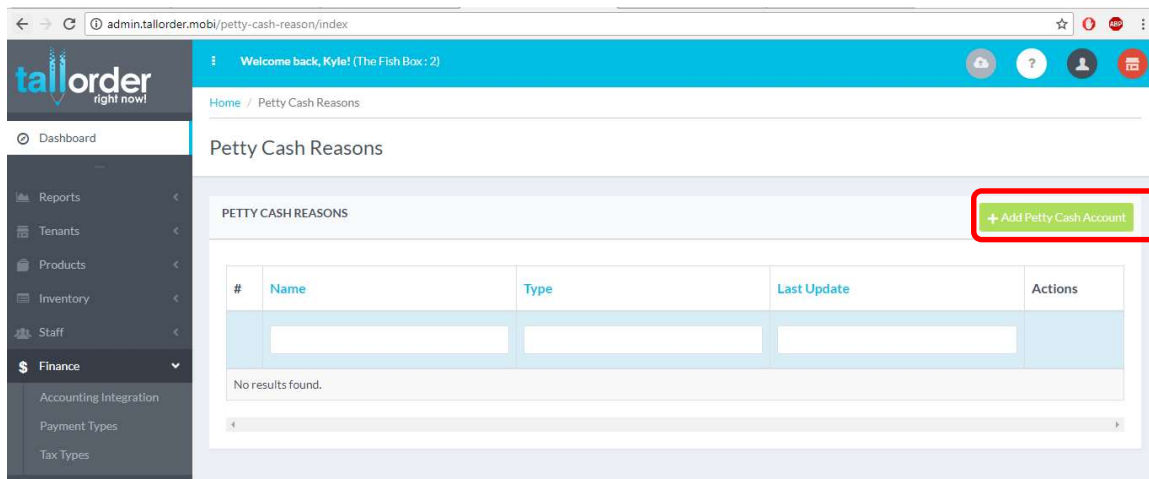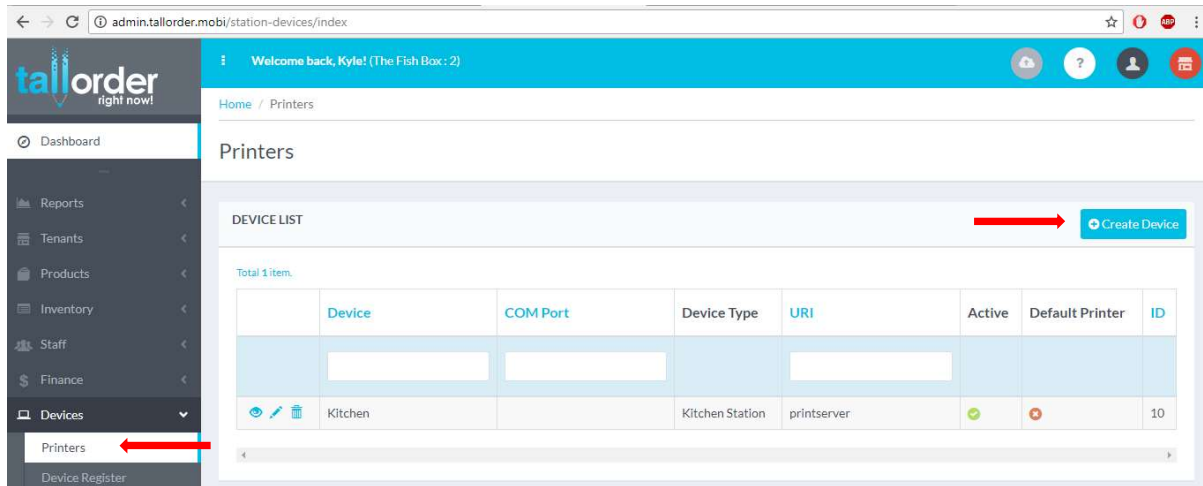

Next, input the respective Petty Cash Name

8. Device Settings

8.1. Printer Settings

Printer stations can be set up in the Devices Tab – this will allow you to set up the respective printing station(s).

Select 'Printers':

Next, select 'Create Device' – you are only required to input the Required fields (marked with an Asterix).

'Printer Name' would be the printer station (Main Printer, Kitchen Printer, Bar Printer etc). 'Device Type' = Select 'Printer' from the drop down list. 'Handler' = Select 'Print Server' from the drop down list.

The rest of the fields can be populated from the TallOrder POS when the printer is installed on the respective device.