Questions? : Hank@InstantOrderOnline.com

InstantOrder®

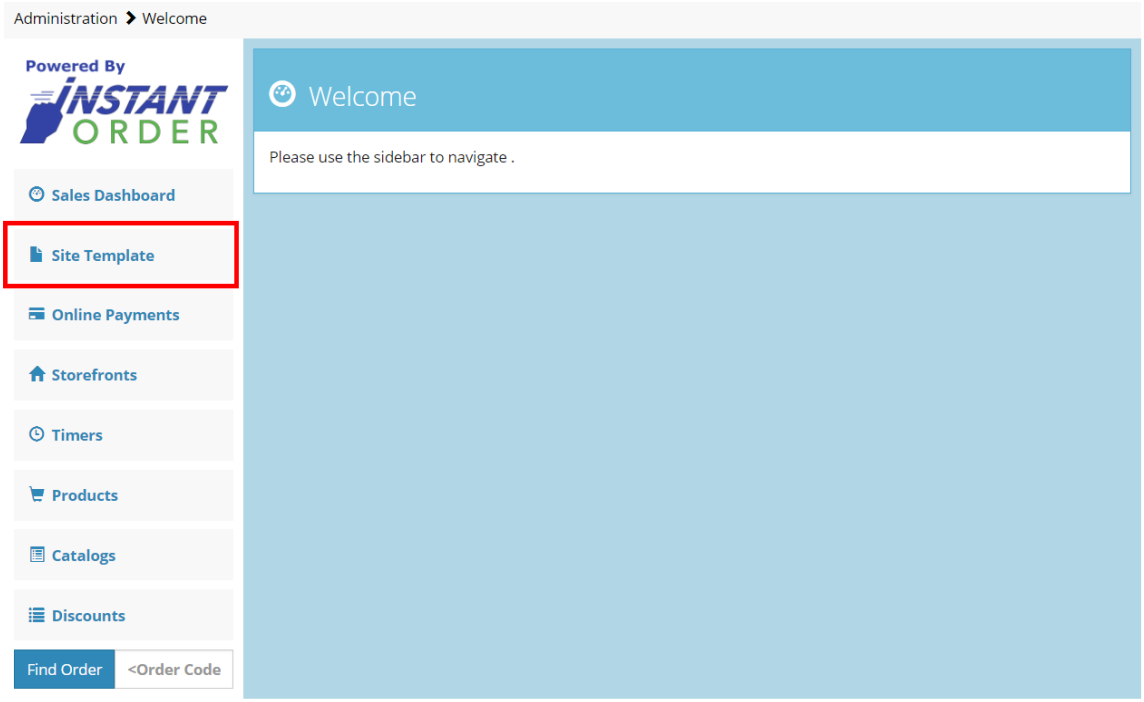
# Appendix


| | |
|---|---|
| **Template Settings** | 2-3 |
| **Creating a Storefront** | 4 |
| **Creating Timers** | 5 |
| **Creating a Product** | 6-12 |
| **Creating Catalogs** | 13 |
| **Editing Timers** | 14-15 |
| **Updating Weights** | 16 |
| **Editing Product Prices** | 17 |
| **Editing Delivery Status** | 18 |
| **Adding Products to a Catalogs** | 19-20 |
| **Listed Catalogs** | 21-22 |
| **Temporarily Removing a Product** | 23-24 |
| **Copying an Existing Product** | 25-26 |
| **Temporarily Disabling the Menu** | 27-28 |
| **Viewing the Sales Dashboard** | 29-31 |
| **Printing Sales Data** | 32 |
| **Creating Discounts** | 33-37 |
| **Creating Online Payments** | 38-41 |
| **Finding an Order** | 42 |

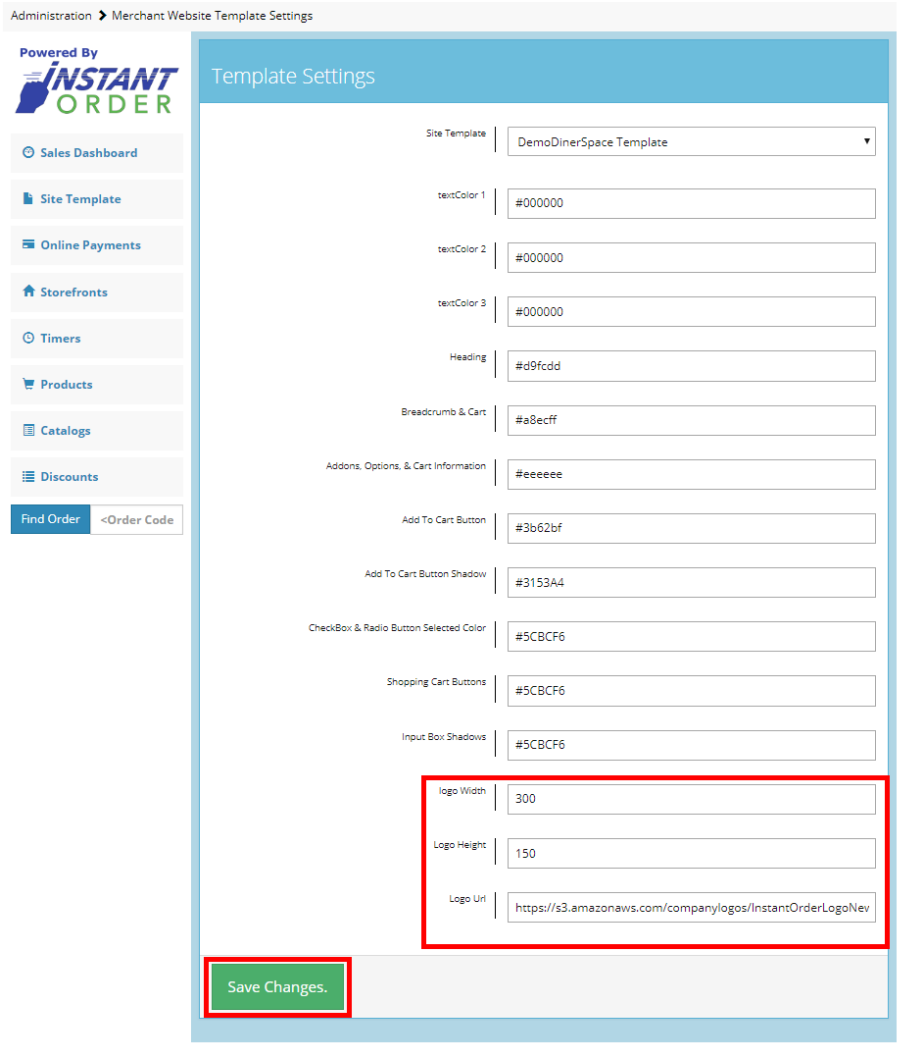
# How to Use Template Settings

Template Settings change the look and feel of your website. These settings allow you to customize your website with color schemes, layouts, and your businesses logo!

Start by selecting **Template Settings**



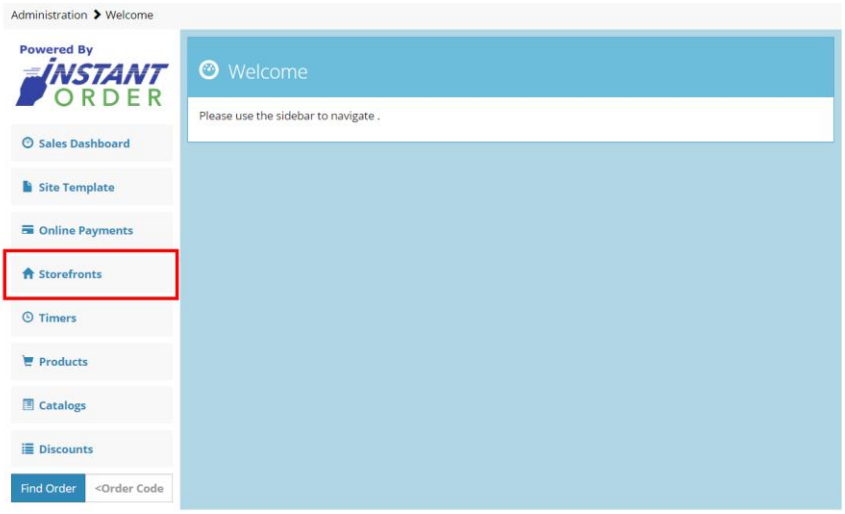
To edit the logo of your business, change the height, and width of the logo. The URL of the location of the logo will also be entered in the **Logo URL** option.




Select **Save Changes** when all changes have been made.

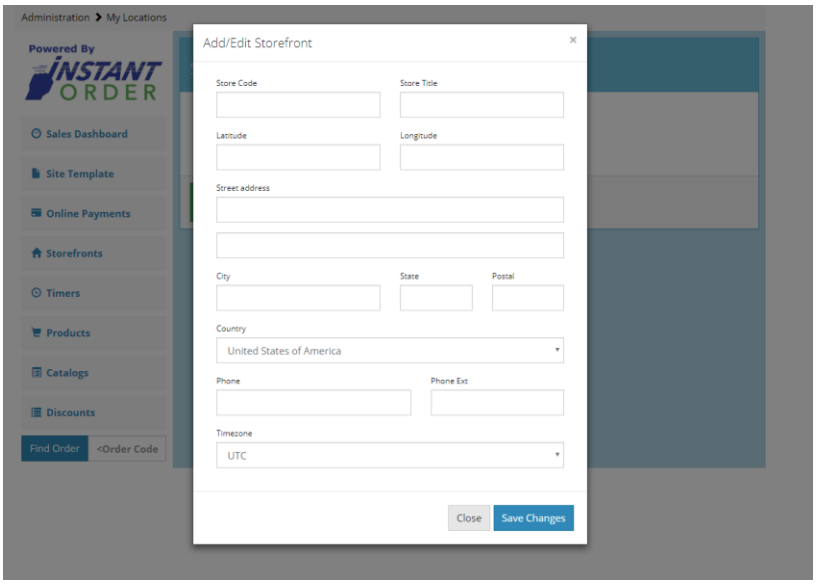
# How to Create New Storefront

Creating a Storefront begins with selecting **Storefronts** from the main dashboard.




This window will show any existing storefronts on the site.

Select **Create a New Storefront**, then proceed to fill all options with the businesses information.




**Store Code:** Enter any number. This number is used to define your store to separate storefronts if you have multiple places of business with the same items.

**Store Title:** Name of the Store

**Latitude/Longitude:** Pinpoints exact location of business. Can be easily found on google earth.

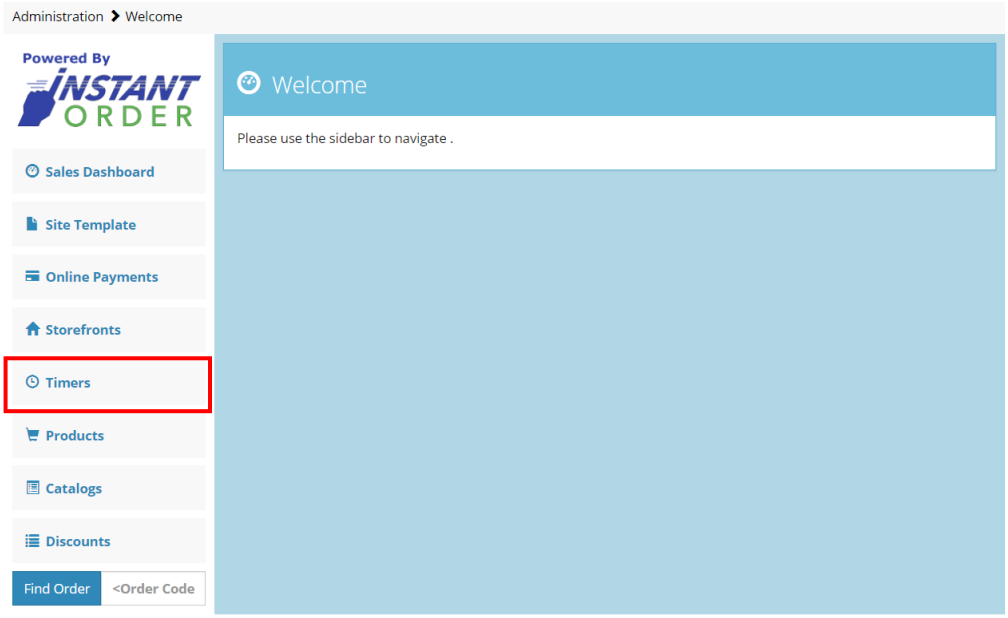
**Street address/Postal Information:** Business's street address and postal information.

**Time zone:** The time zone that your business operates under.

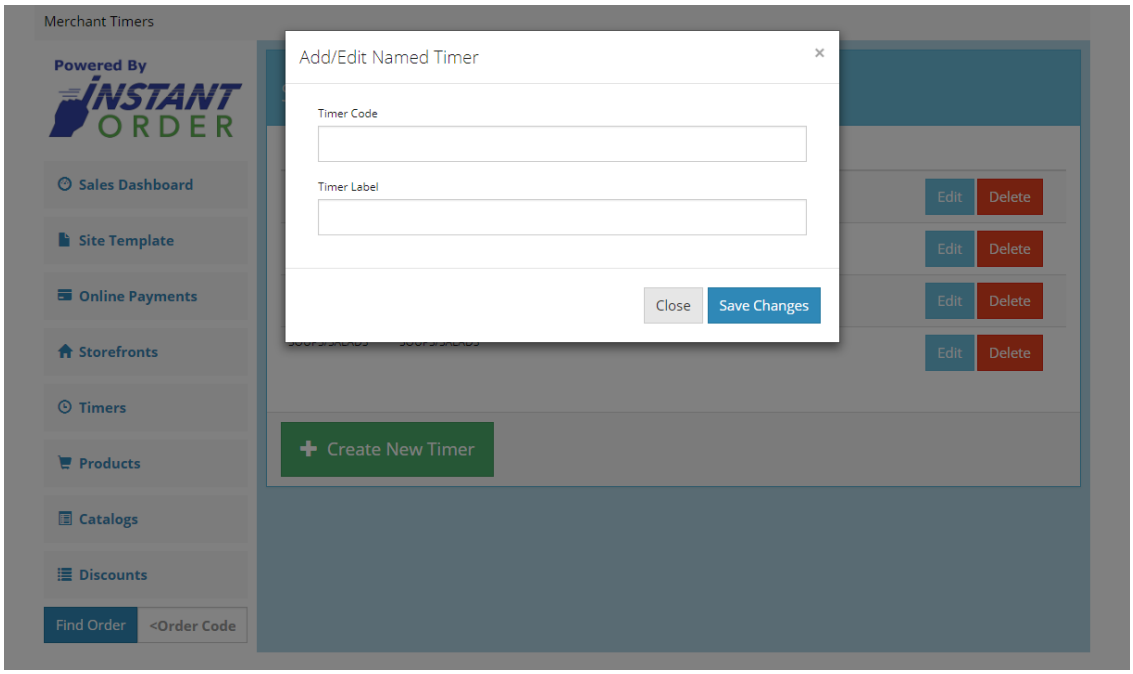
Once all the options have been filled in with the businesses information select **Save Changes.**

# How to Create Timers

Creating Timers begins with selecting **Timers** from the main dashboard.




Fill out the Timer Code and the Timer Label



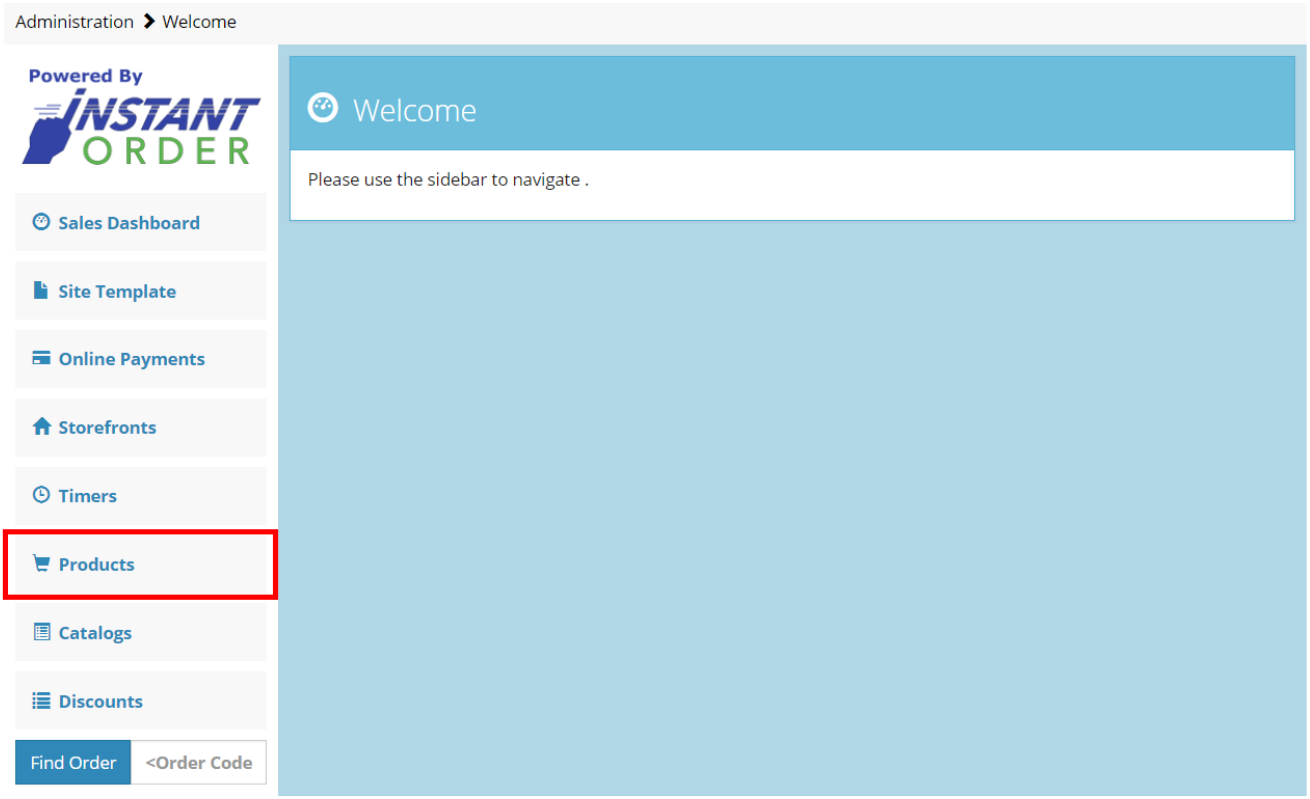

**Timer Code:** A word used as a code. Ex. OVEN, GRILL … This code will be used when creating a new product to put each product under a timer category. Each timer category time can be changed as preparation times very throughout the business.

**Timer Label:** Name the timer with what the timer is for.

Select **Save Changes** when Timer Code, and Timer Label are filled in.

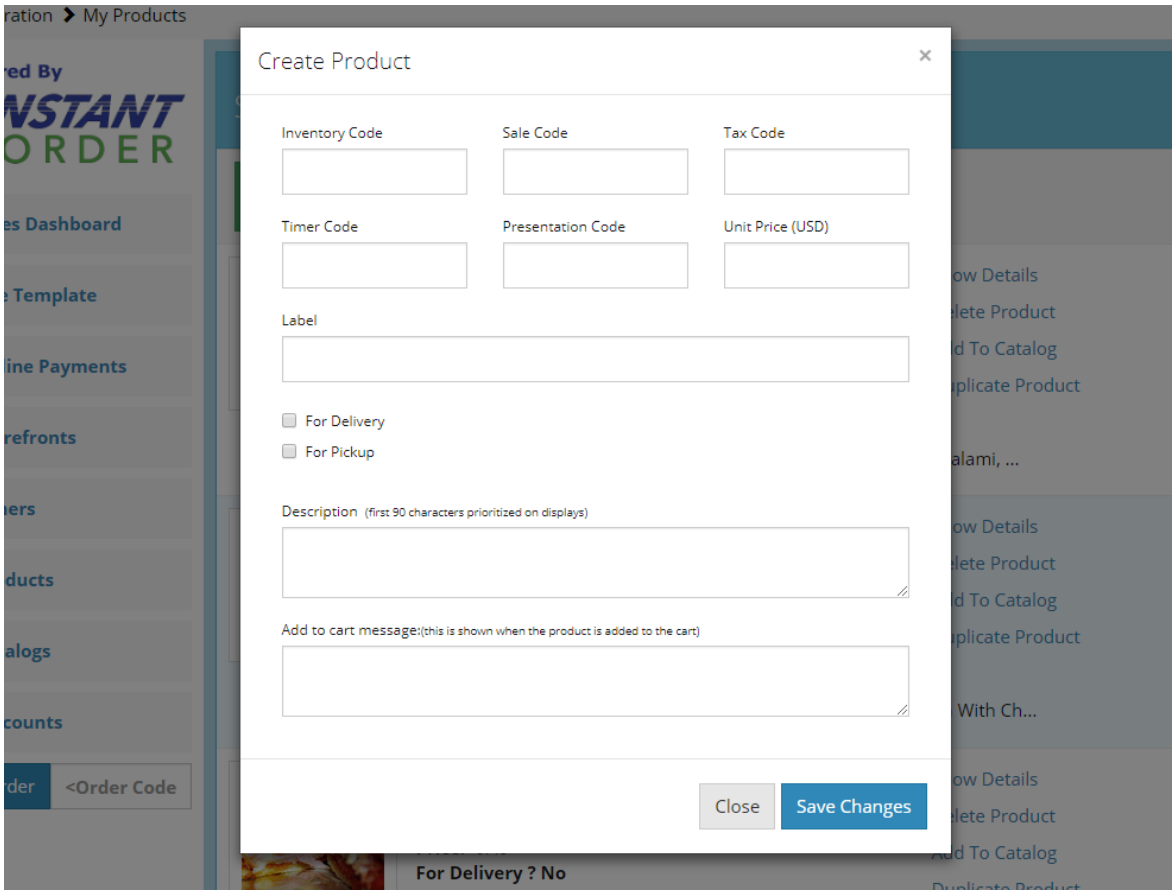
# How to Create New Product

Creating a Product begins with selecting **Products** from the main dashboard.




This window displays all existing products on the site.

Select **Create a New Product**, then fill in all product information




**Inventory Code:** Allows you to give each product an identification code. This can be used so that if you run out of an item that is in several other products, you can easily choose to hide the products so that no more orders are placed. For example, if a business selling pizzas runs out of mushrooms, any item containing mushrooms can be hidden so that the topping is not available for order.

**Sale Code:** Each Item is given a sale code so it can be added to the sale system.

**Tax Code:** Some items require a local or state tax to be added.

**Timer Code:** In some business, different stations have unique preparation times. The timer code allows you to accurately depict how long a specific product takes to make. This gives the customer the time in which their item will be ready to pick up while maintaining freshness of the product. Ex. GRILL, OVEN …

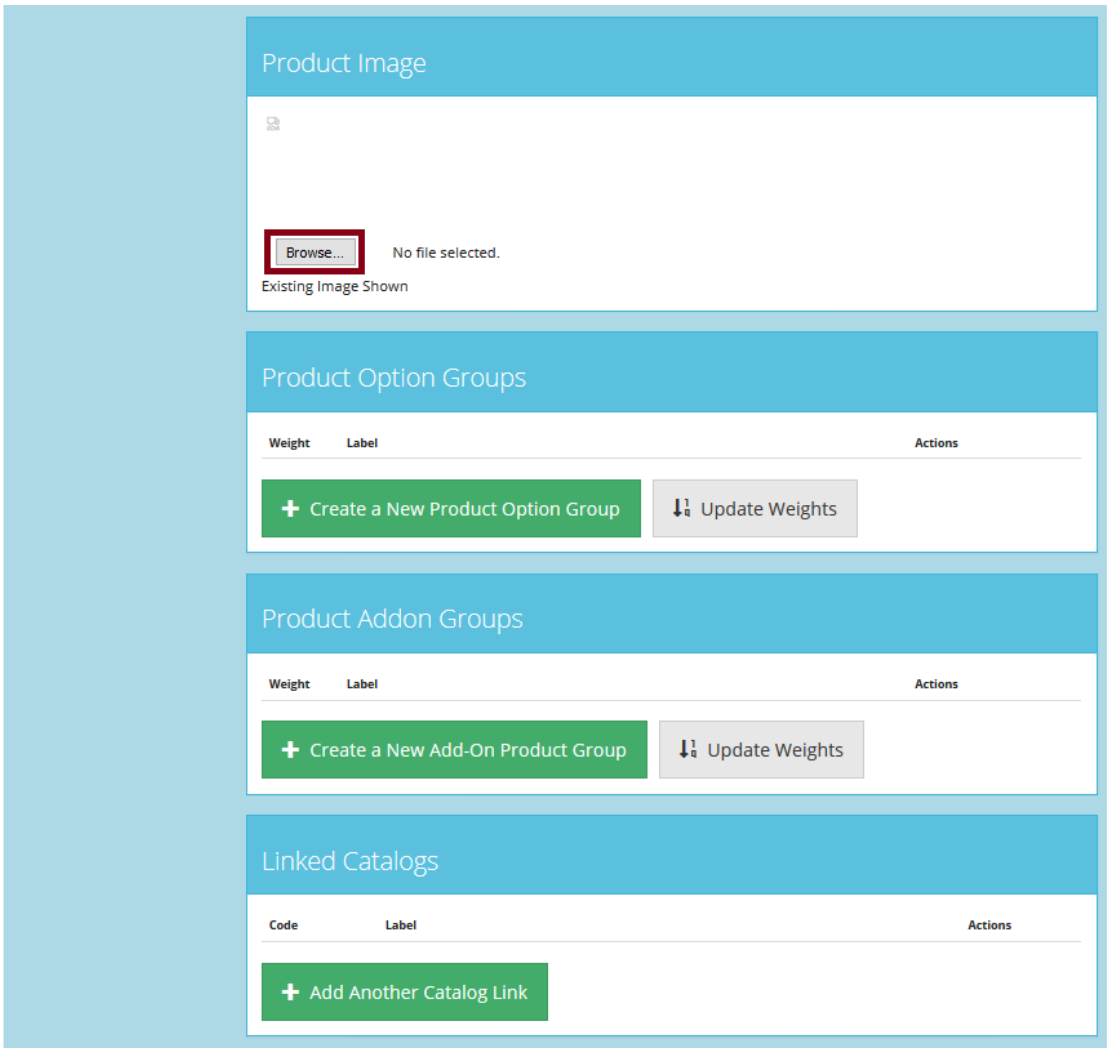
**Presentation Code:** Allows you to customize the look on the front end for a product. The presentation code allows you to add custom graphics for an individual item. Can be left blank if no presentation difference is desired.

**Unit Price (USD):** Easily set, or change how much each item cost.
**Label:** Gives a name to the item.
**For Pickup/Delivery:** Choose whether an item can be delivered, or picked up in store.
**Description:** Describe the product. Will show next to the product on the web site.

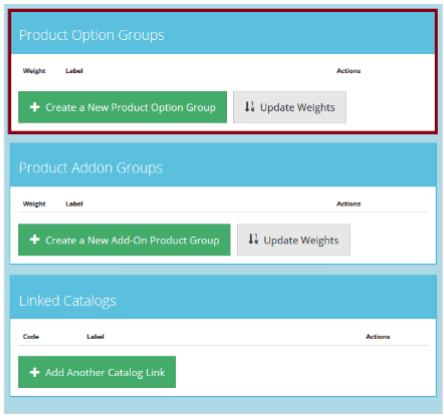
**Add to cart message:** This feature allows you to add a promotional message after an item is added to the shopping cart.

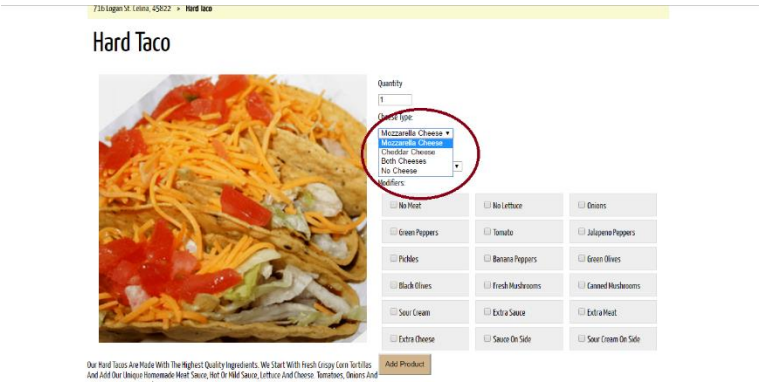
Once all product information is entered select **Save Changes** to move on.

**Product Image:** Select **Browse** and choose an Image from computer to upload. (Must be a **.png** file)

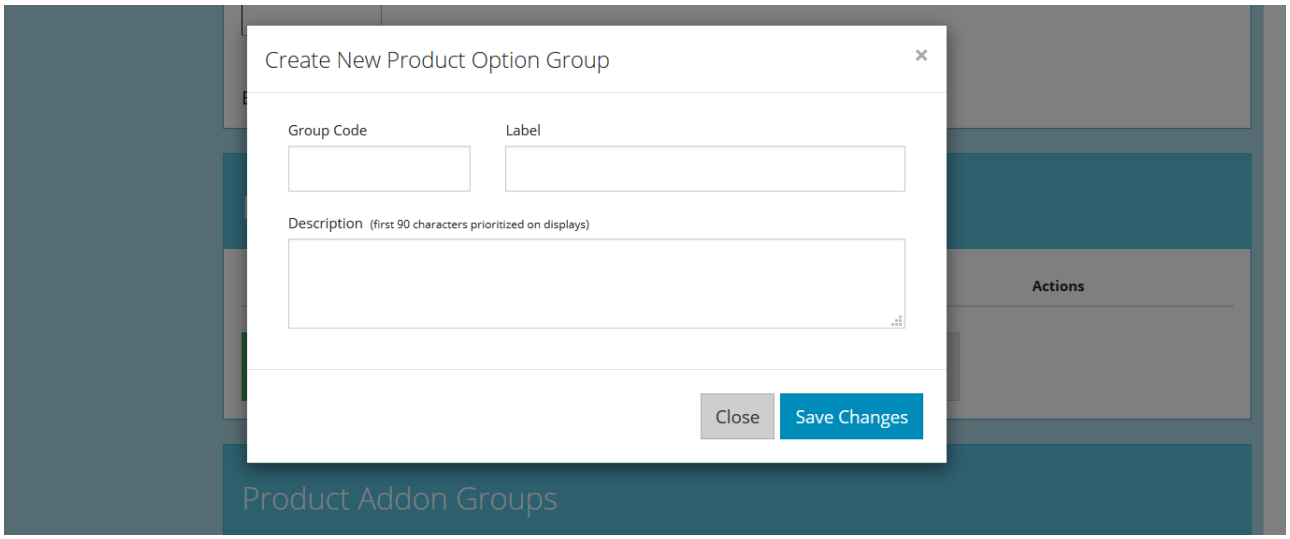



**Product Option Groups:** Product Object Group details are product modifiers that allow a customer to select a setting that cannot be “and or”. These options will be shown with a drop-down bar.



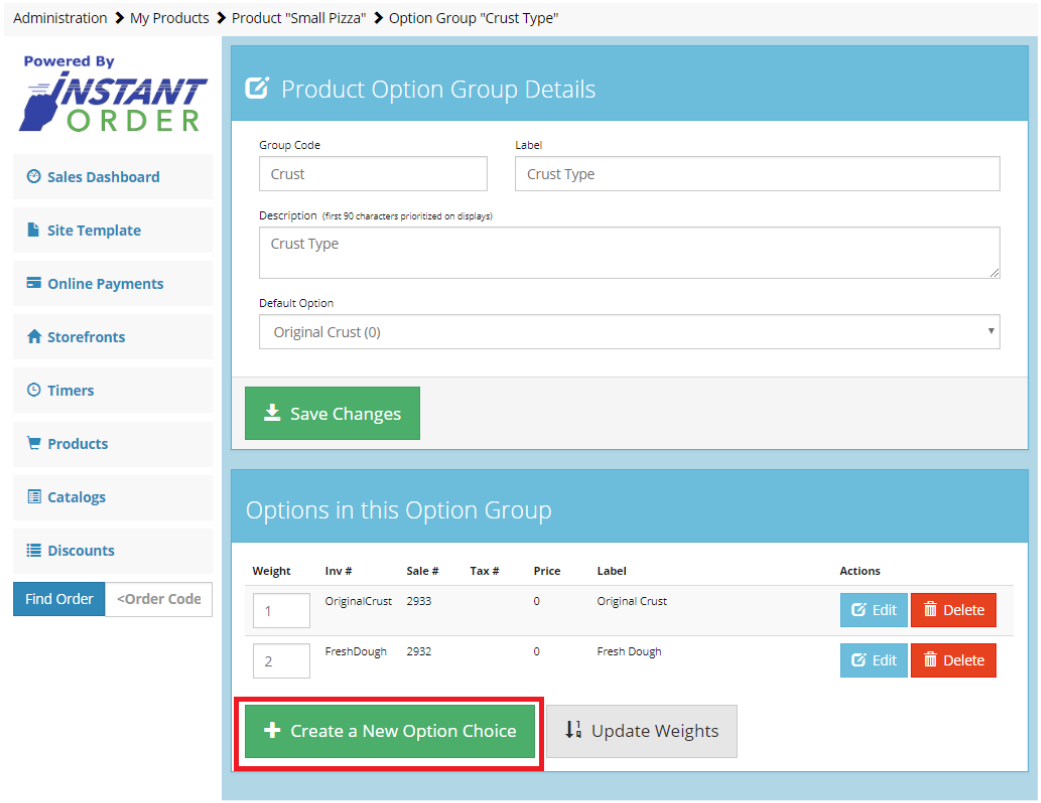




Select **Create a New Product Option Group** under the product’s page.

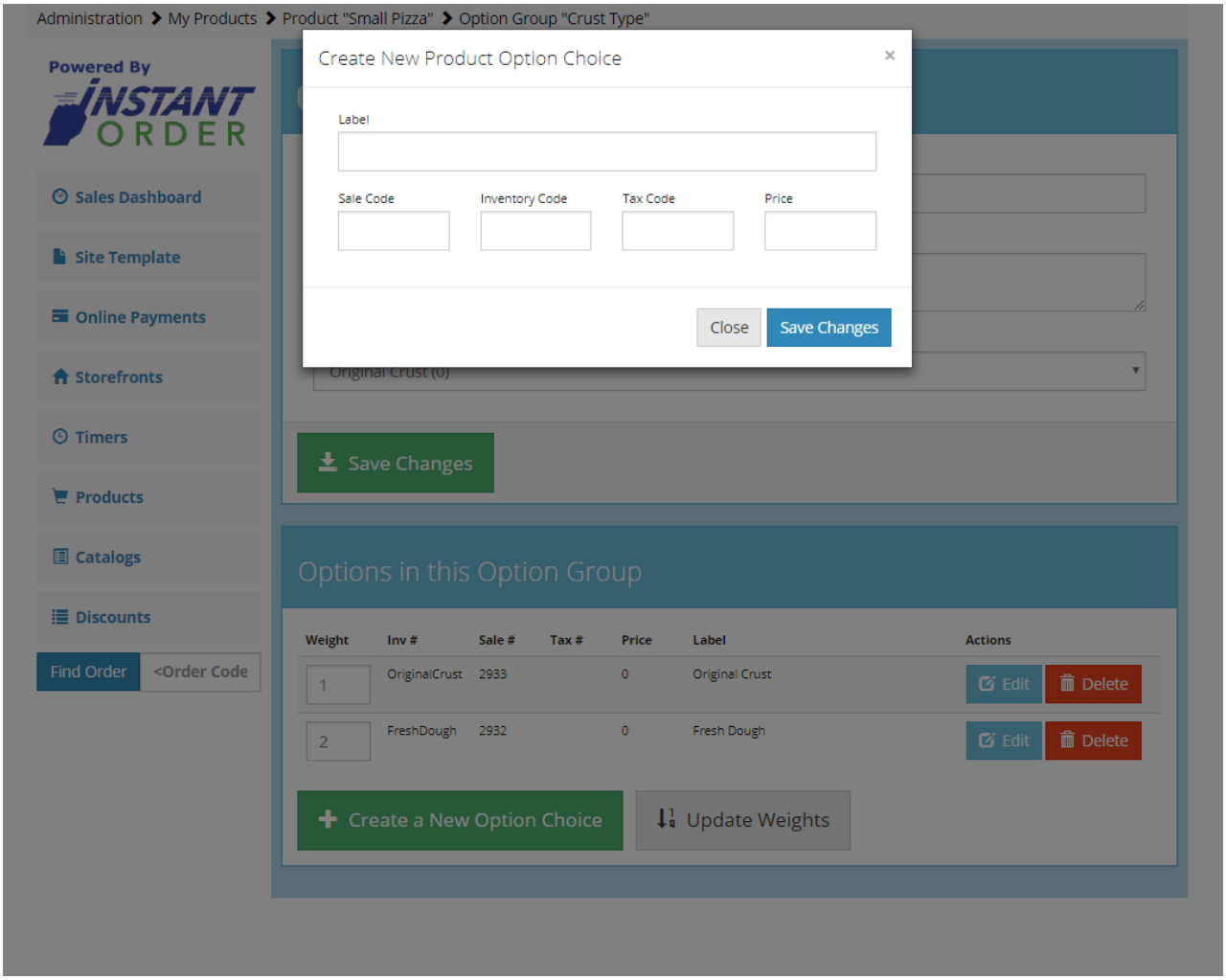



Give the Option Group a label and description. For example, pizzas, would have crust type as a group code.

Once a New Product Option Group has been created select **Create a New Option Choice**



Fill out all the options that apply to your business.




**Label:** Gives a name to the item.

**Sale Code:** Each Item is given a Sale code, so it can be added to the sale system.

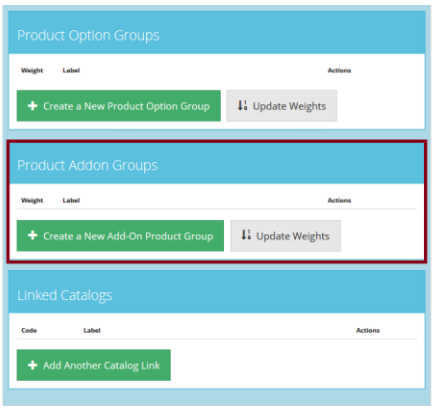
**Inventory Code:** Allows you to give each product an identification code. This can be used so that if you run out of an item that is in several other products, you can easily choose to hide the products so that no more orders are placed. For example, if a business selling pizzas runs out of mushrooms, any item containing mushrooms can be hidden so that the topping is not available for order.

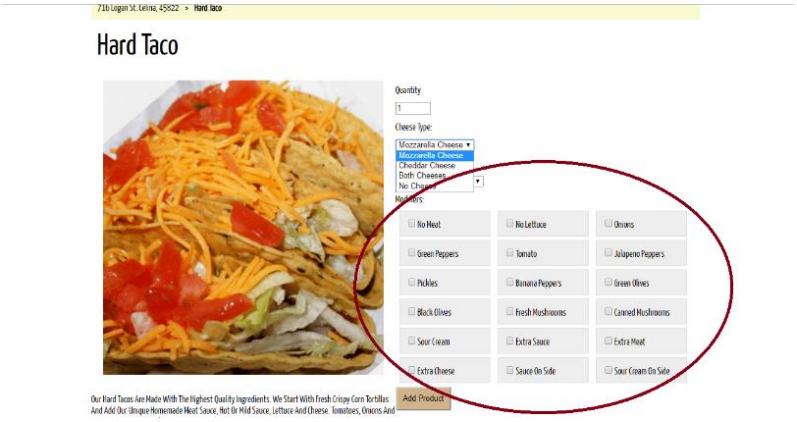
**Tax Code:** Some items require a local or state tax to be added.

**Price:** Set how much the item cost in USD.

*Make sure to select a Default Option under Product Option Group Details and select **Save Changes**. Failing to do this will cause an error in the system.

## Product Add-on Groups:

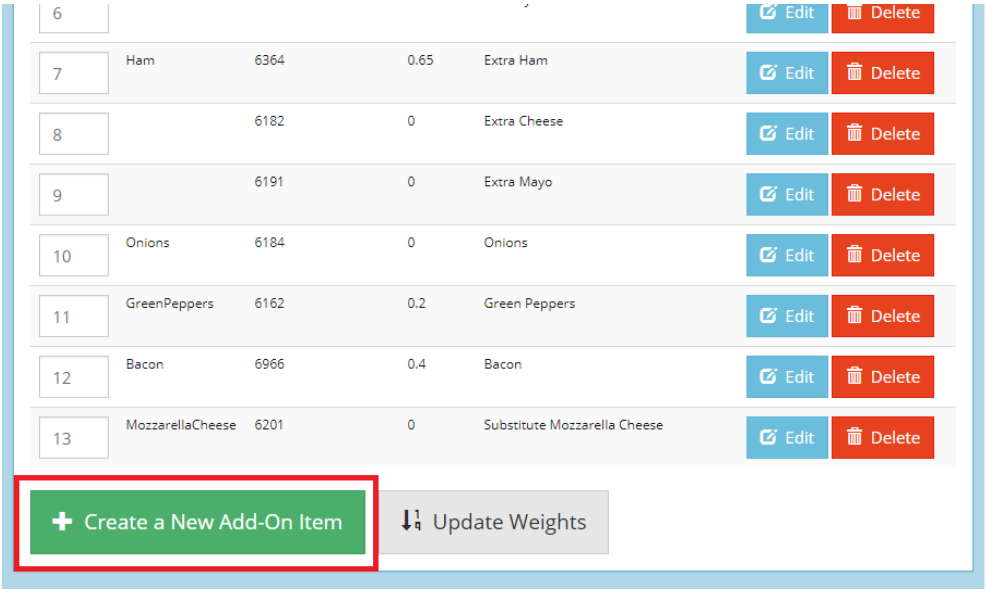



Select **Create a New Add-On Product Group** under the product's page.

Give the Item a label and description

Once a new Add-On Product Group has been created select **Create a New Add-On Item**




**Label:** Gives a name to the item.

**Sale Code:** Each Item is given a Sale code so it can be added to the sale system.

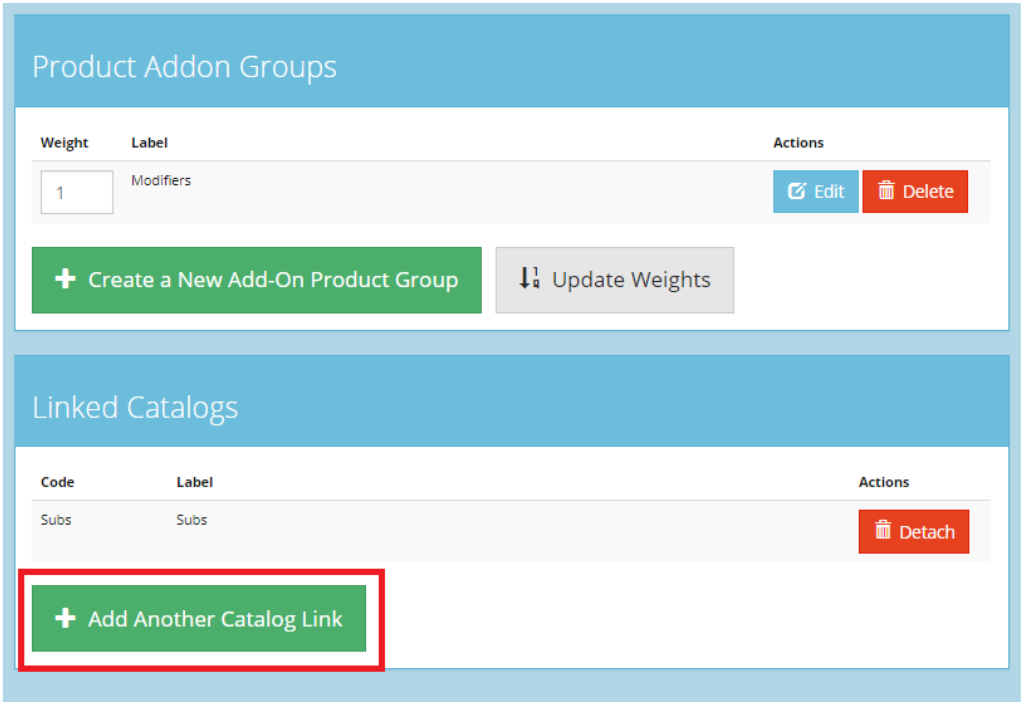
**Inventory Code:** Allows you to give each product an identification code. This can be used so that if you run out of an item that is in several other products, you can easily choose to hide the products so that no more orders are placed. For example, if a business selling pizzas runs out of mushrooms, any item containing mushrooms can be hidden so that the topping is not available for order.

**Tax Code:** Some items require a local or state tax to be added.

**Price:** Set how much the item cost in USD.

## Linked Catalogs:

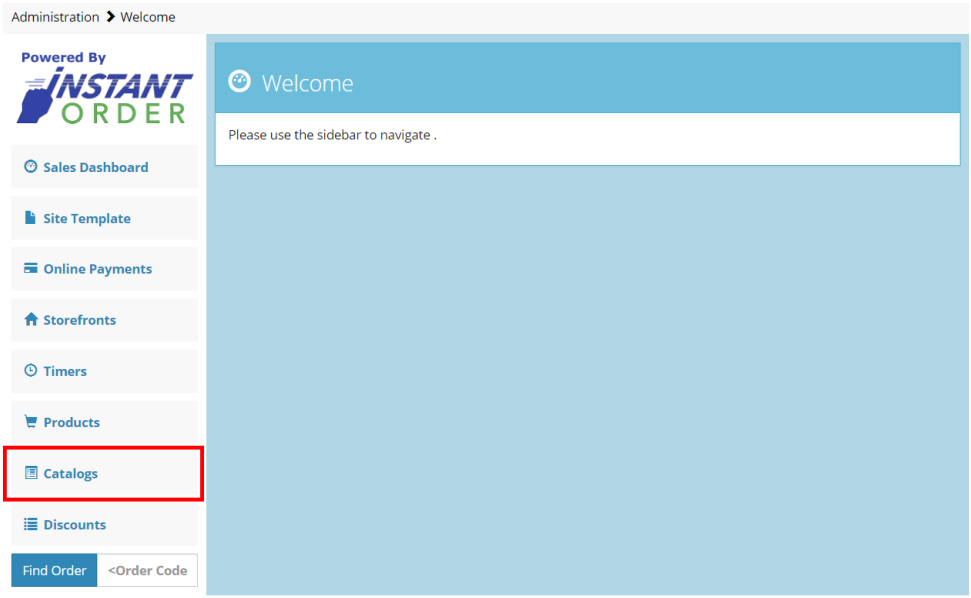
Linked Catalog is located at the bottom of each individual Product page. Linked Catalogs are used to place each item into a category.




Once an item is placed into a catalog it will be displayed on the “Front End” of the menu.

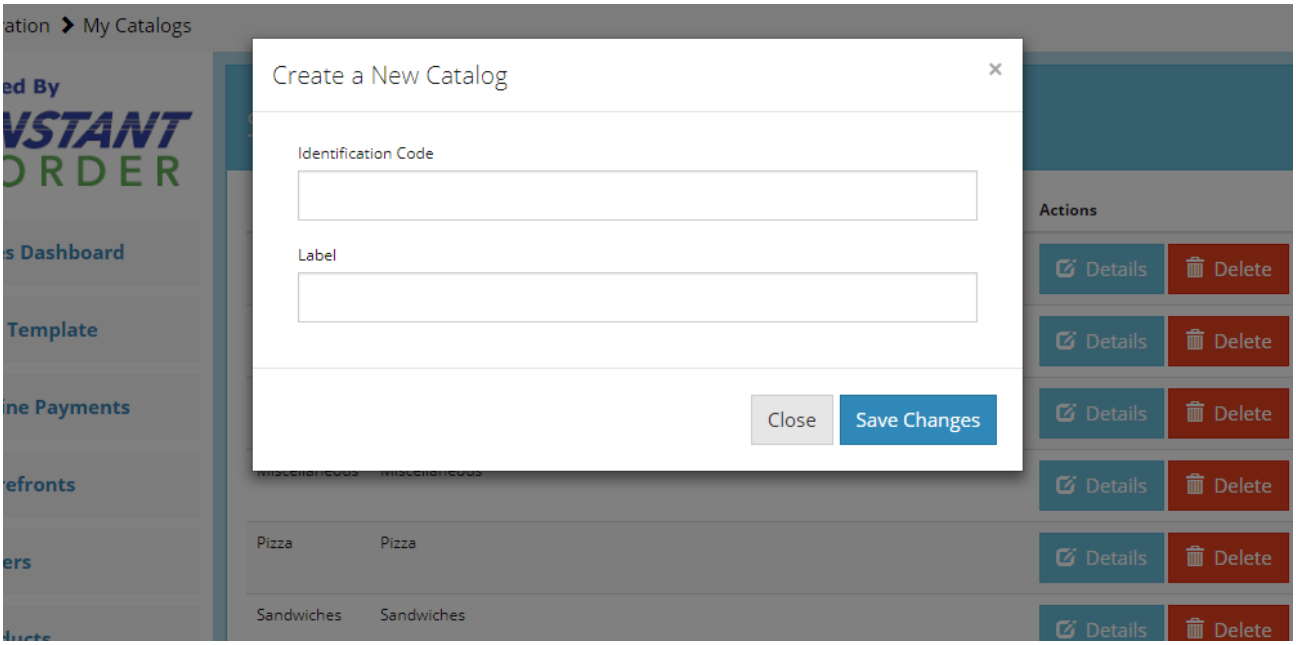
# How to Create Catalogs

Creating a Catalog begins with selecting **Catalogs** from the main dashboard.




This window displays all existing catalogs on the site.

Select **Add a New Catalog**, then give the catalog an Identification Code and a Label.



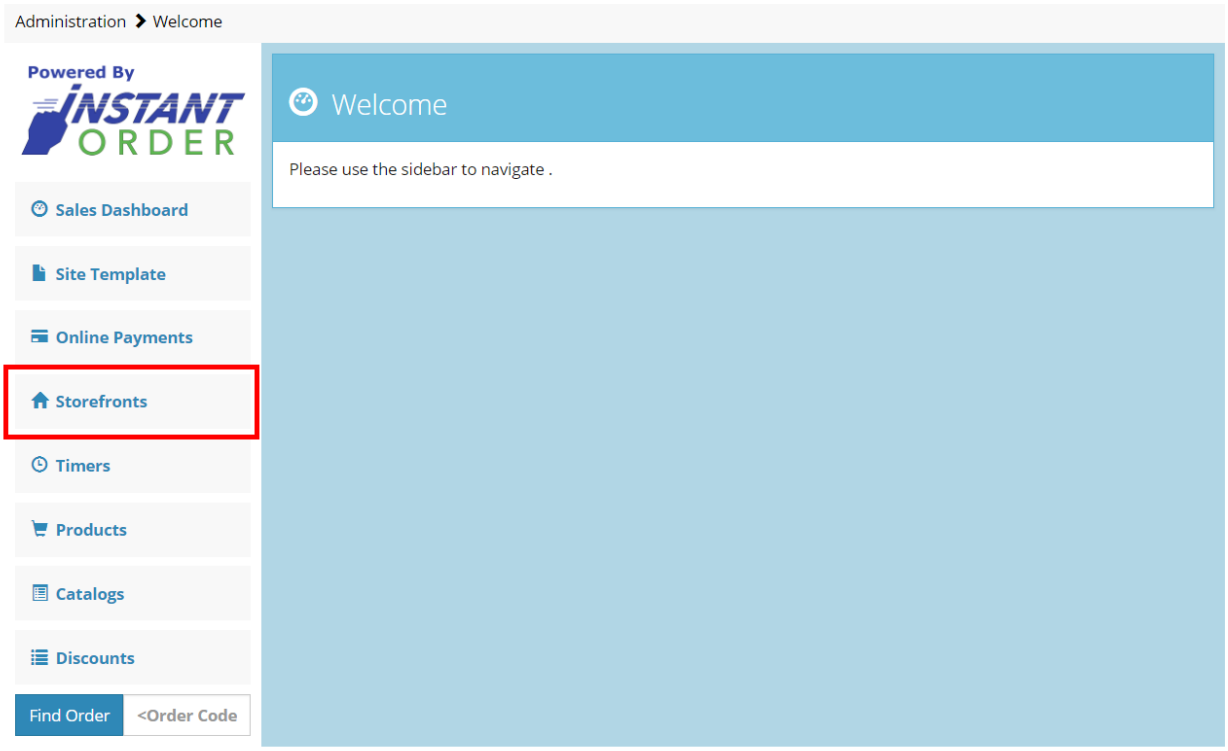

**Identification Code:** Create an ID for your catalog. Often is the same as the label.

**Label:** Create a label for the catalog.

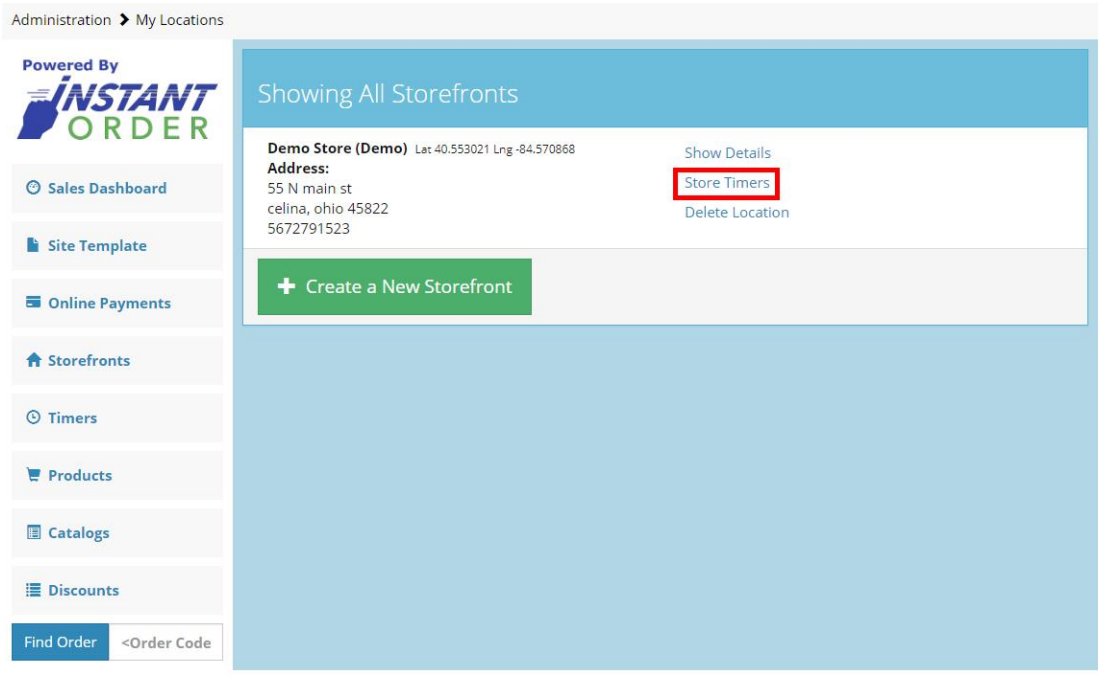
Select **Save Changes** when Identification Code, and Label are filled in.

# How to Edit Timers

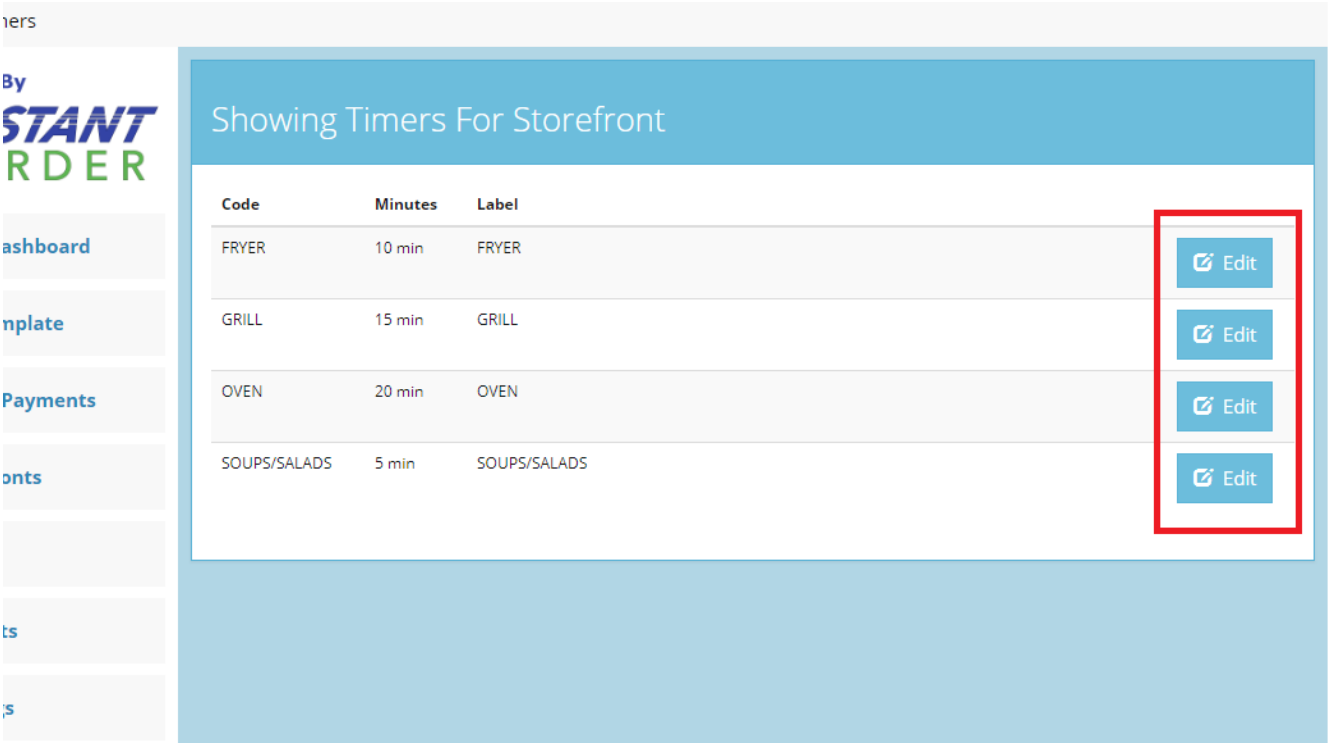
Edit timers by selecting **Storefronts** from the main dashboard.




While on the Showing All Storefronts page select **Store Timers**.



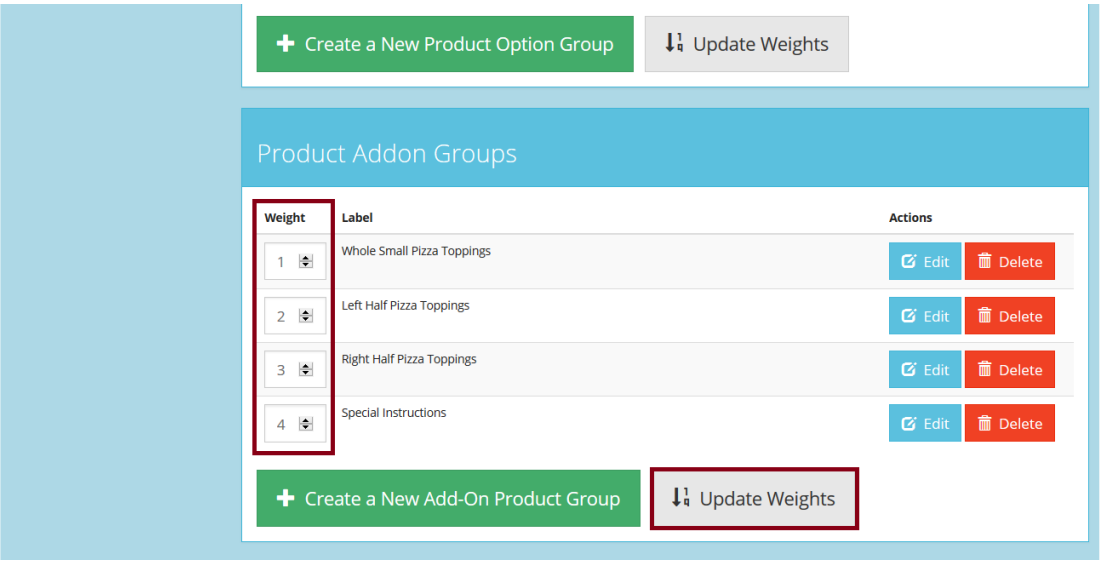
Select **Edit** to change each timer as preperation time changes



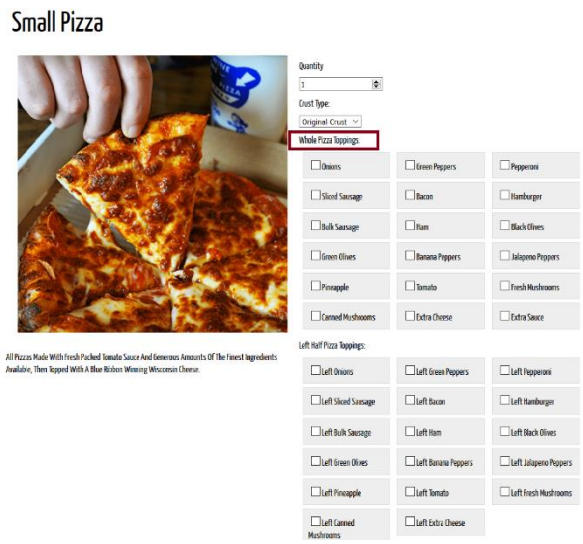

These times will be edited thoughout the operation hours by a staff member in order to ensure accurate order pickup times so that the customer receives finished and fresh food.

# How to Update Weights

Under each product's Option Group, or Addon Group you can Update Weights. Updating the weights alters the order in which options appear on the finished web site.

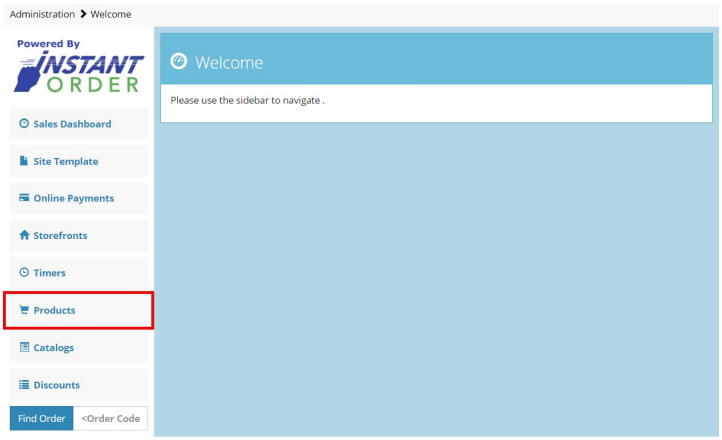



Because the "Whole Small Pizza Toppings" has the weight of 1, it will be shown first.

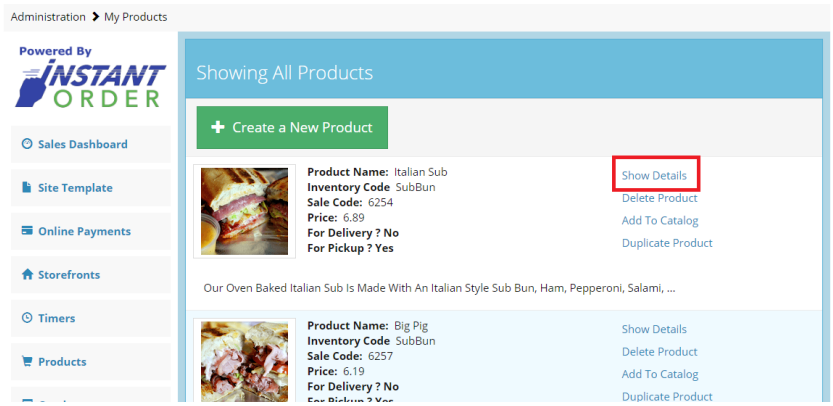


# How to Edit Product Prices

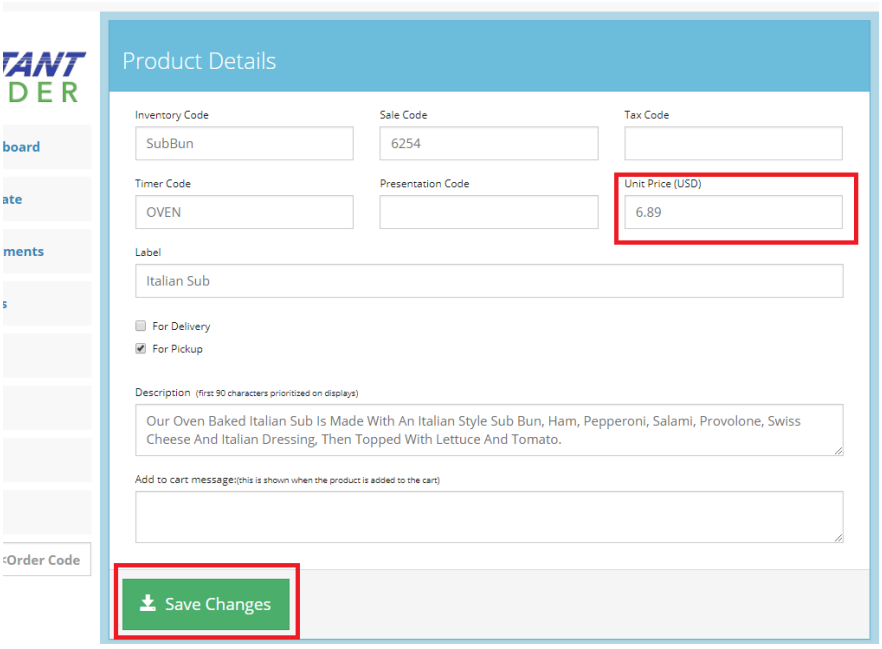
Select **Products** to see all the products




Over the product that you would like to edit the price of select **Show Details**

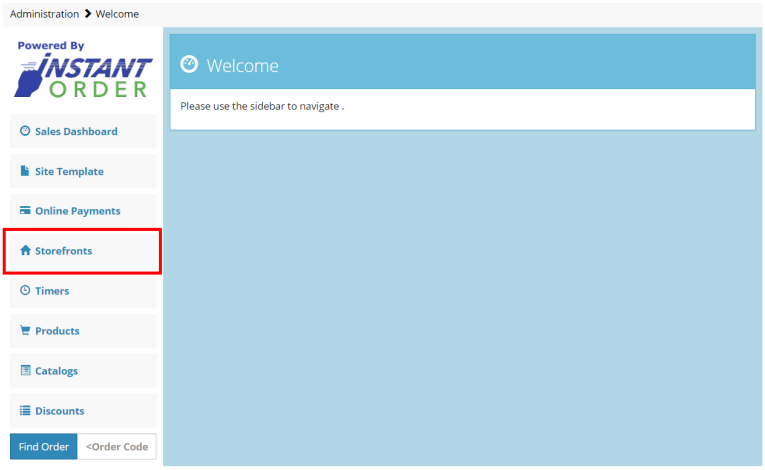



Under **Unit Price (USD)** you can edit the current product price. After changing the price select **Save Changes**

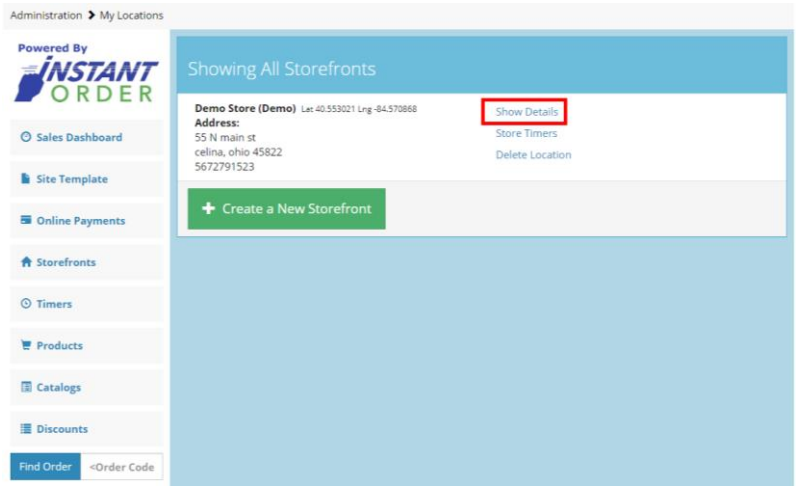


# How to Edit Delivery Status

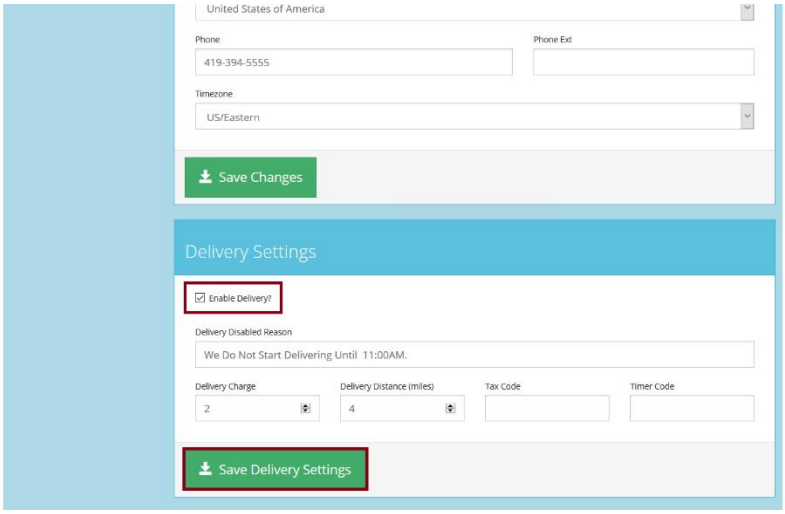
Select **Storefronts**




Select **Show Details**



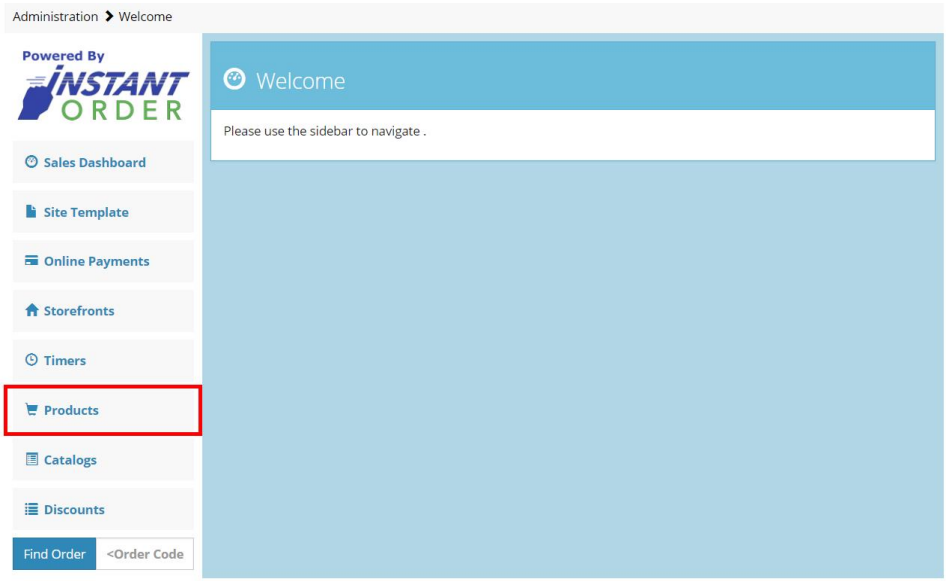

Check **Enable Delivery** to enable delivery. When the box is not checked, delivery will not be available.



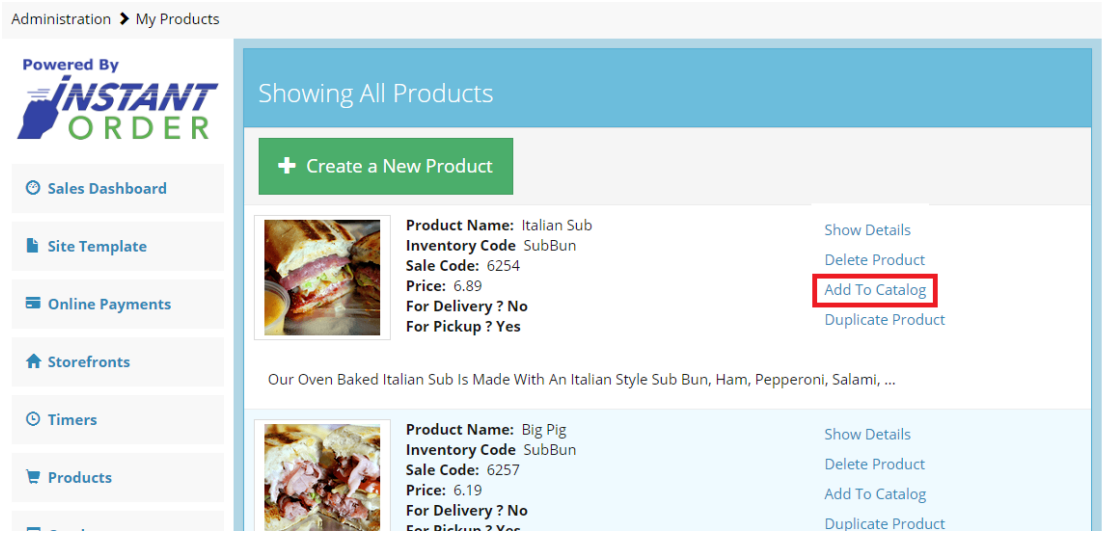

Select **Save Delivery Settings** when the changes have been made

# How to Add Products to Catalogs

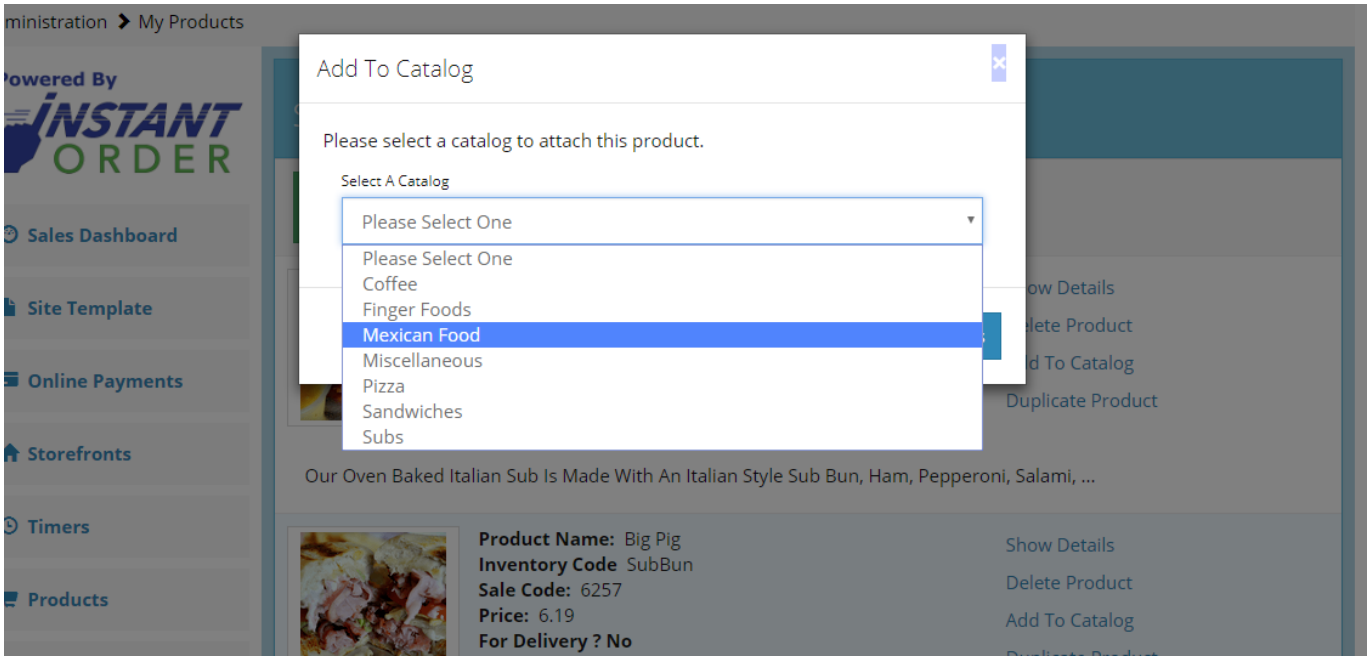
Start by selecting **Products**




Then select **Add to Catalog**



Select a Catalog to add the product to.

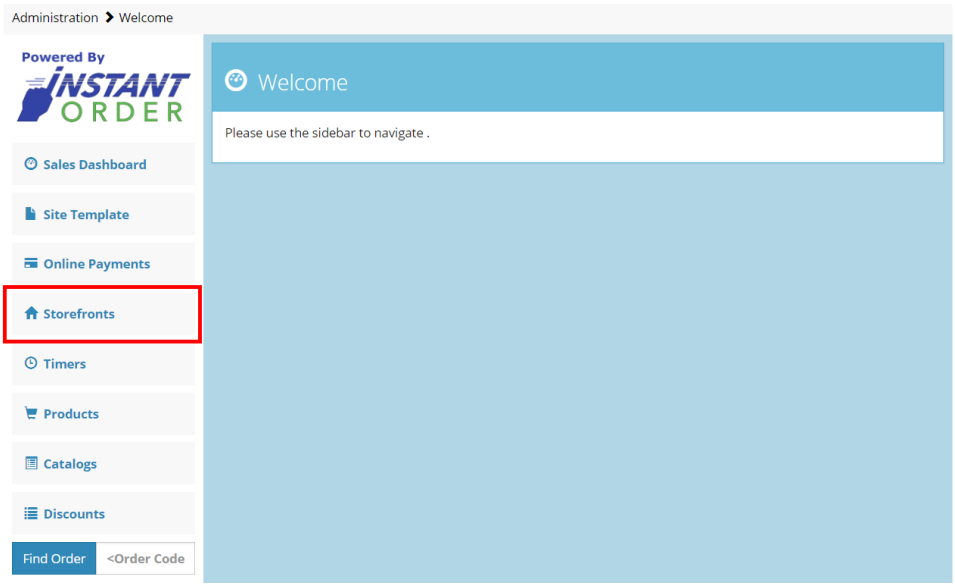



After selecting a catalog for the product select **Save Changes**

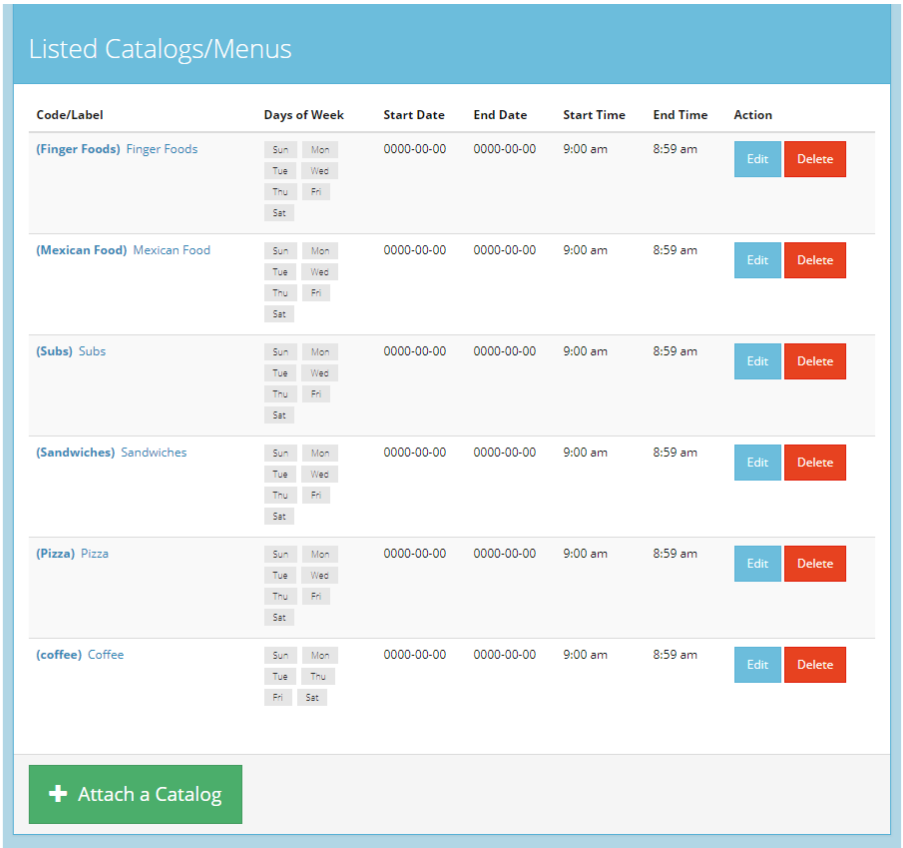
# Listed Catalogs/Menus

These options are used to create times in which a business's products are available for purchase. For example, you can set times for a breakfast menu so that the products on the breakfast menu are only available in the morning hours.

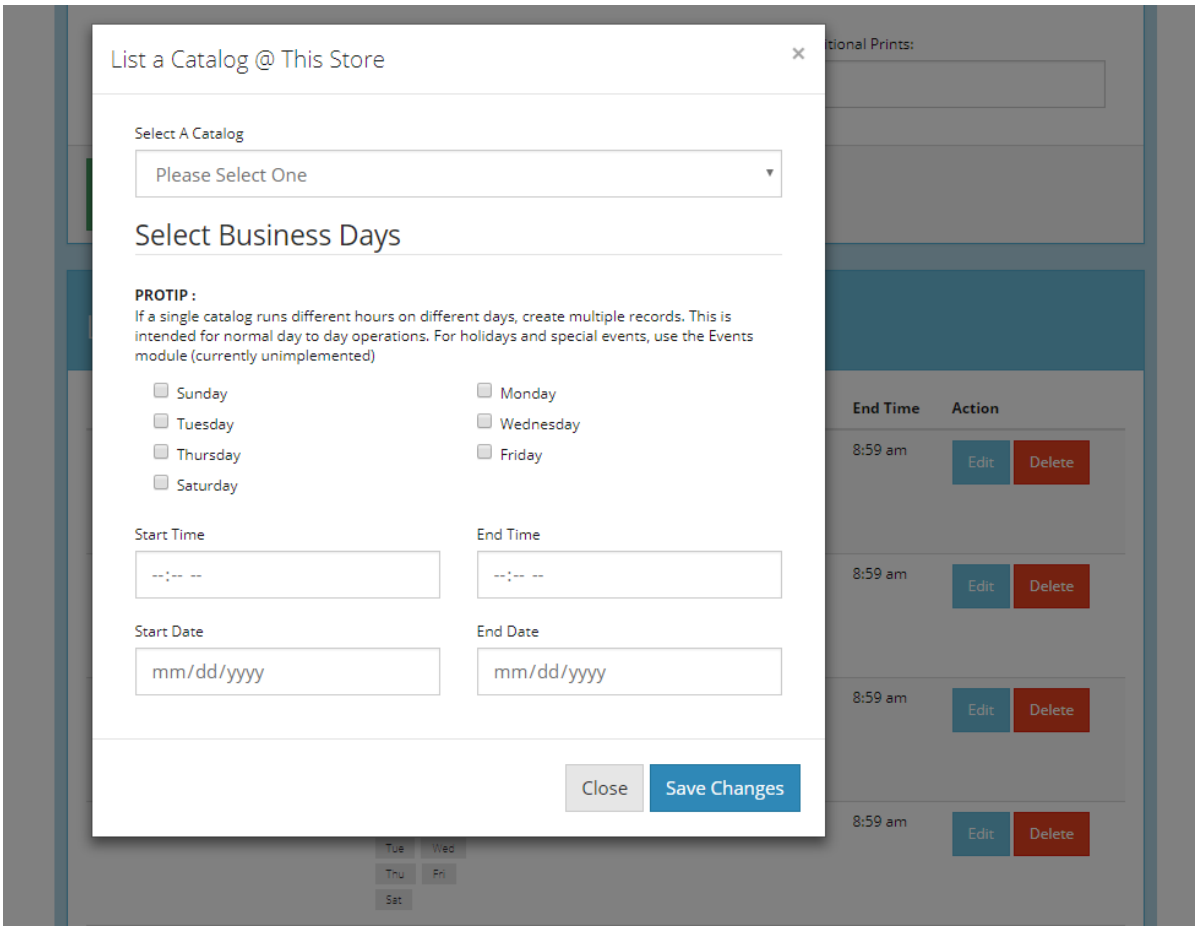
Start by selecting **Storefronts**




At the bottom of the Storefronts page select **Attach a Catalog**



Fill in all information for the Menu Catalog




**Select A Catalog:** Choose a catalog to add to Listed Catalogs. For example, breakfast, fried food, pizza…

**Select Business Days:** Choose what days this Catalog applies. Can also be used to define store hours for different days. Some businesses have different hours on week days and weekends.

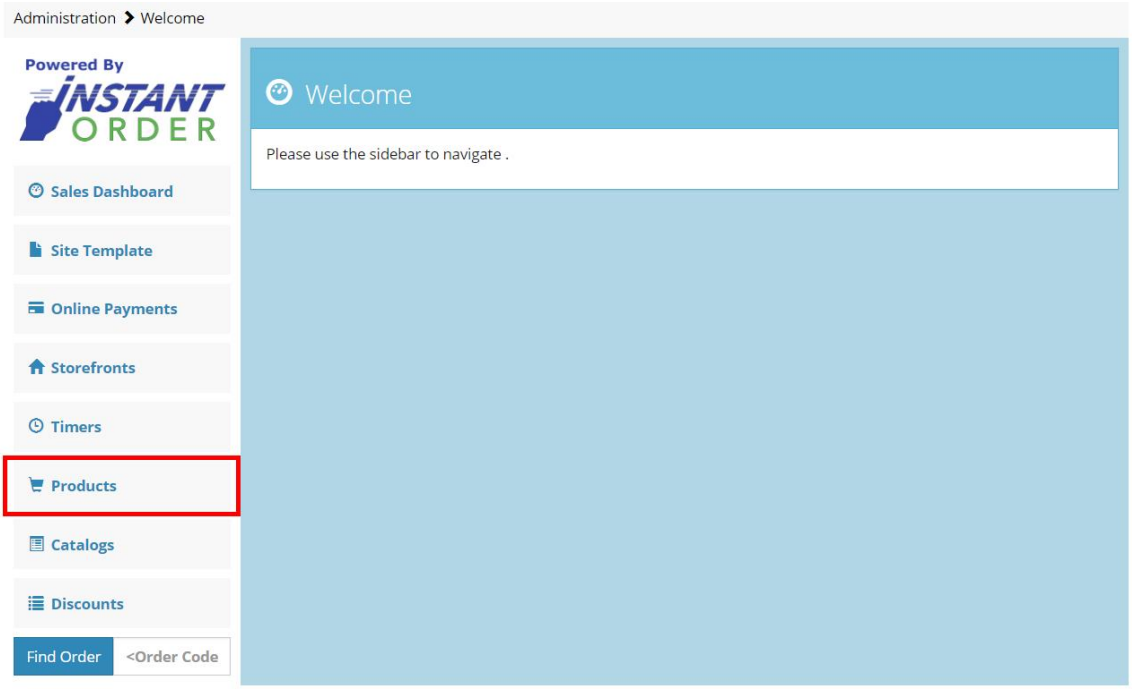
**Start Time-End Time:** Select the time that the product will be available to purchase. For example, 10:00am to 11:00pm

**Start Date-End Date:** Can be used for seasonal items. If the item is available year-round then set a very far off date for your end date.

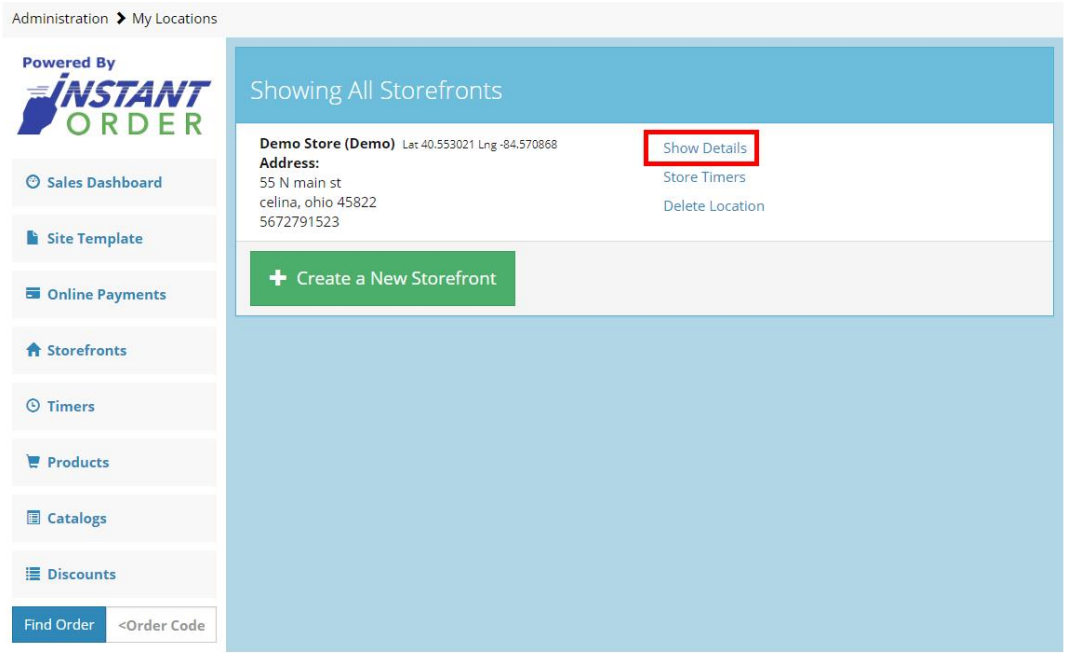
# How to Remove Product Temporarily

These steps will guide you to remove a product from the front end without deleting the product. This could come in handy when your business runs out of a product temporarily.

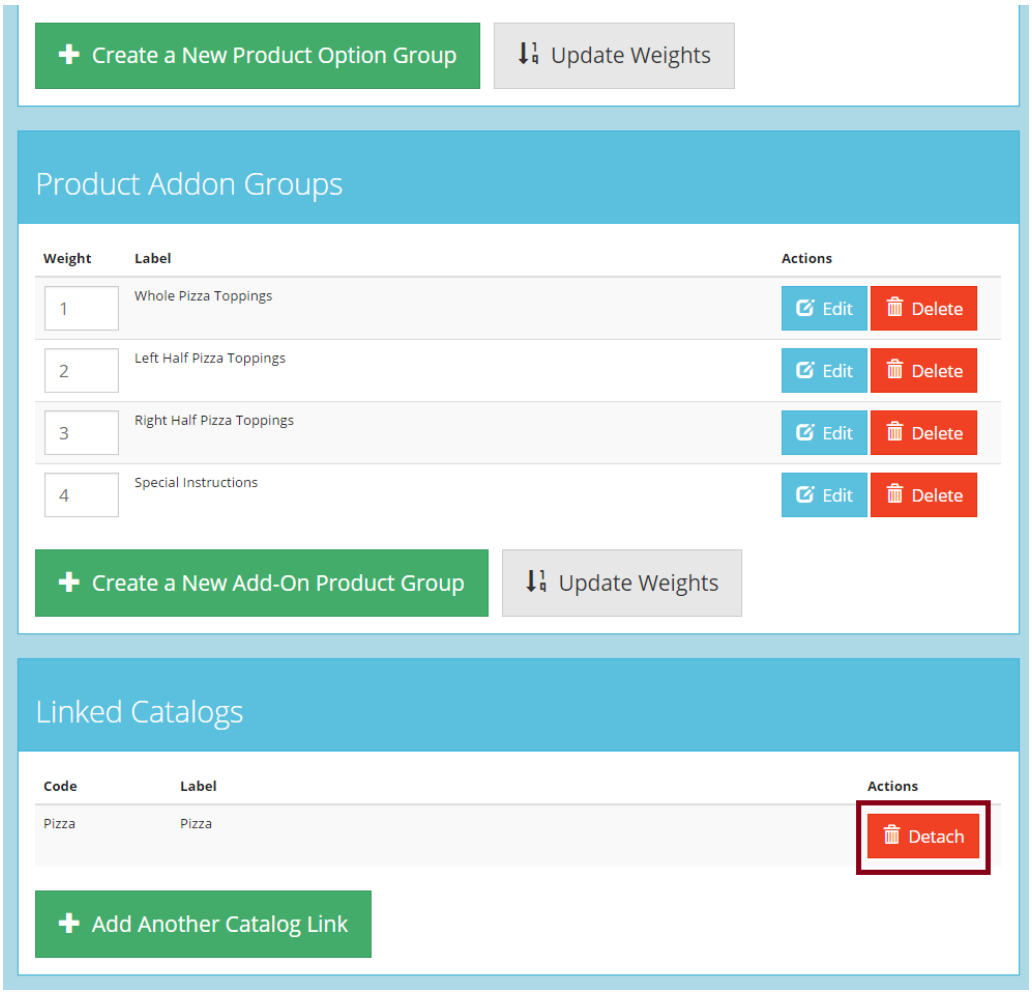
Start by selecting **Products**




Over the product that you would like to edit the price of select **Show Details**




Go to the bottom of the products page to Linked Catalogs and select **Detach** to detach your product.

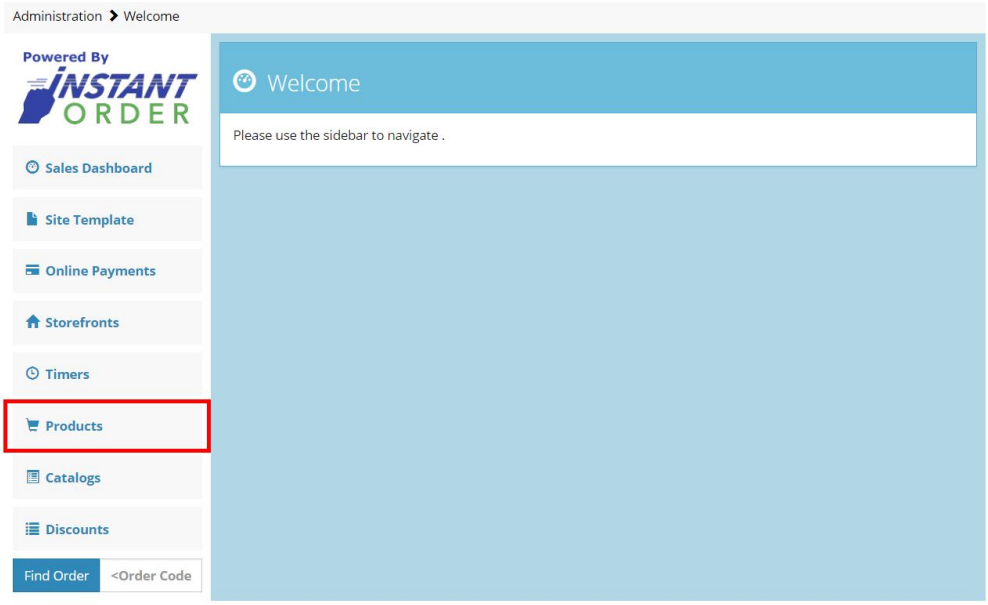



When you want to re-add the product back to the catalog simply follow the same steps, but select **Add Another Catalog Link** and select the catalog to attach the product to.

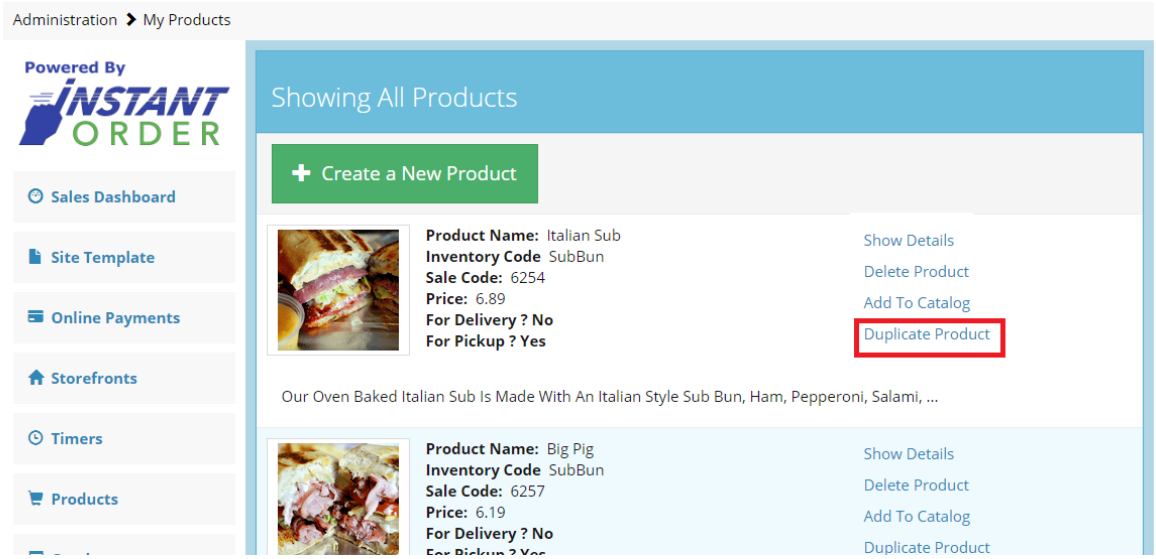
# How to Copy an Existing Product

These steps will guide you in copying an existing product. This tool makes adding multiple, similar items easy!

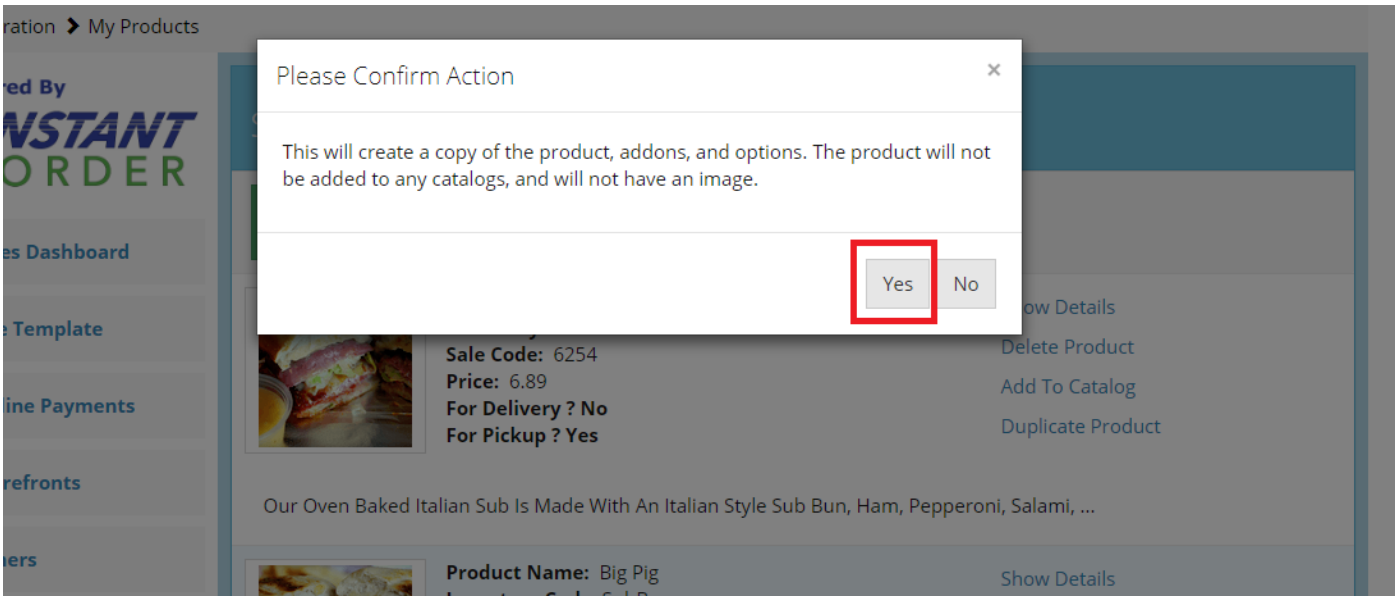
Start by selecting **Products**




Select **Duplicate Product**

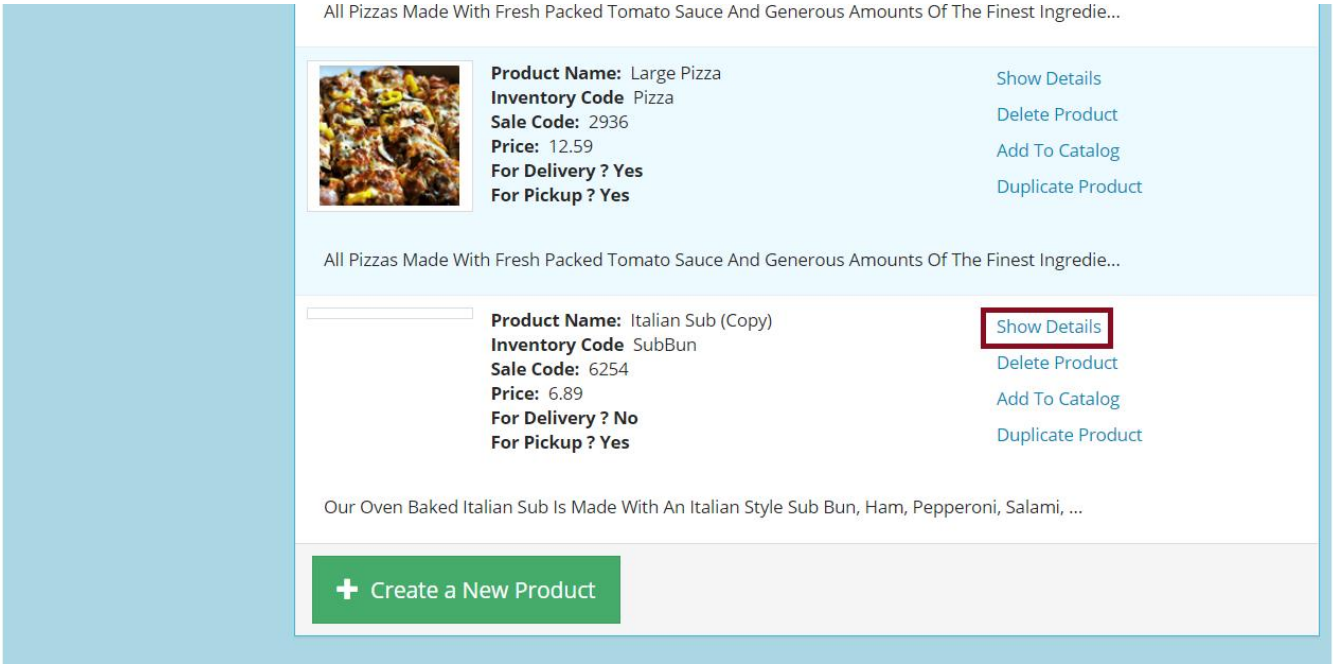


Select **Yes**




Your duplicated product will then be at the bottom of the products page, but there are still a couple of steps to complete the new product.

Select **Show Details**



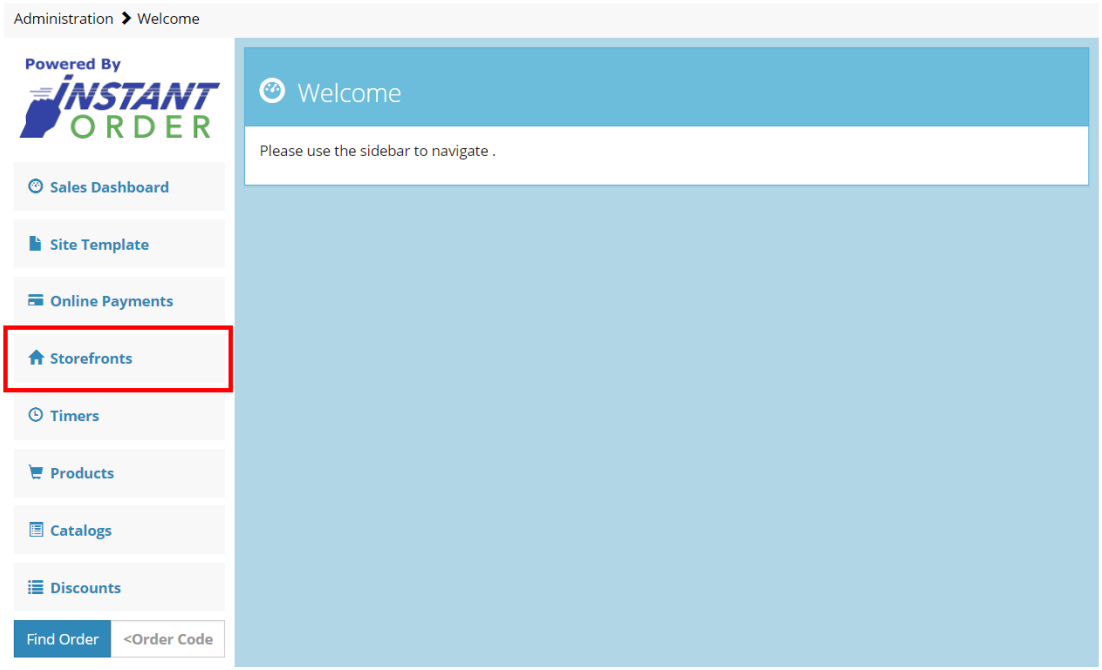

Make any changes necessary to the Product Details.

Fields like Unit Price, Label, Timer Code, and Description could need altered for your new product.

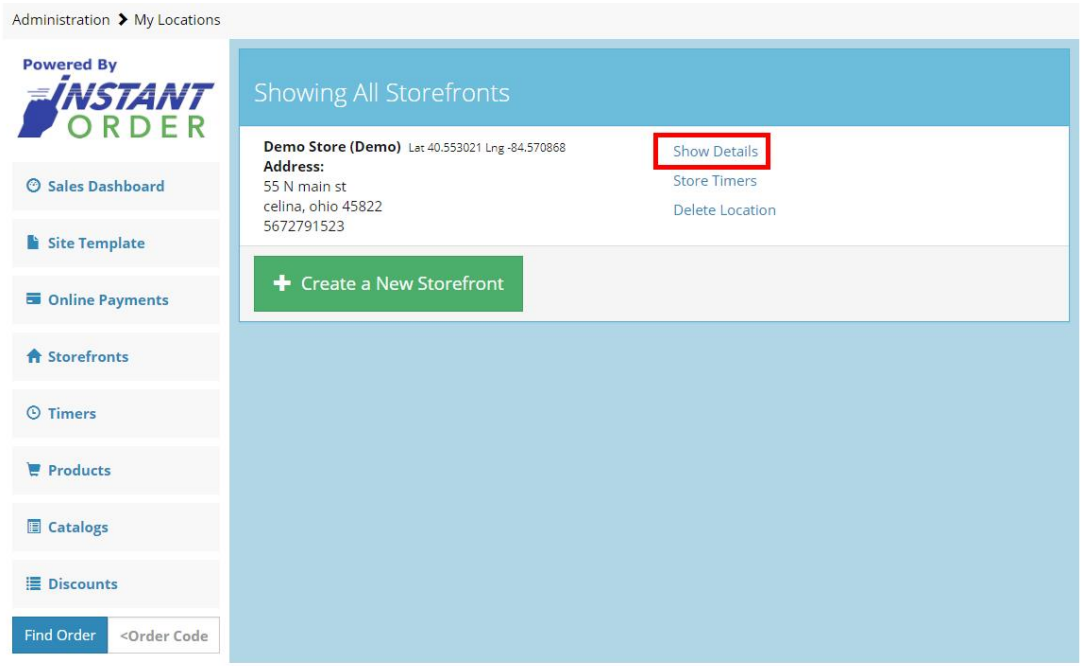
When all product details are correct select **Save Changes**

# How to Disable Entire Menu for Holidays, or an Emergency

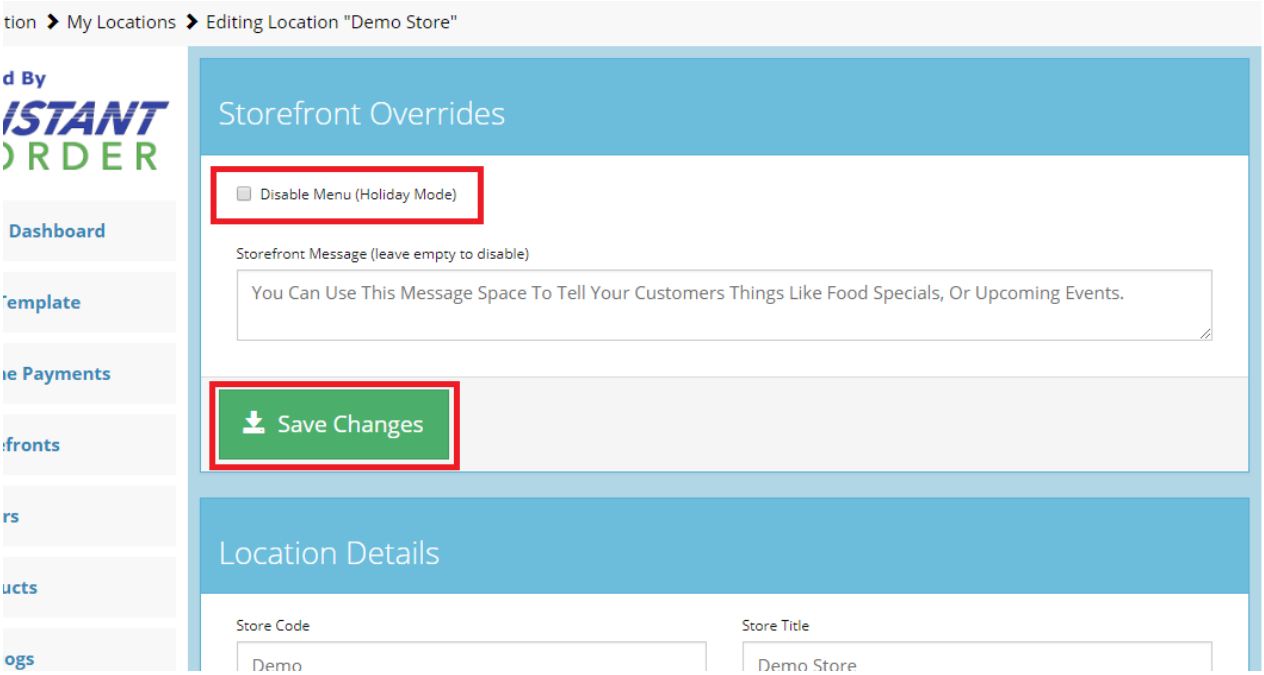
Start by selecting **Storefronts**




Select **Show Details**



Select the check box labeled **Disable Menu**




Under **Storefront Message** create a message to explain reasoning for disabling the menu, or leave this box empty to display no message.

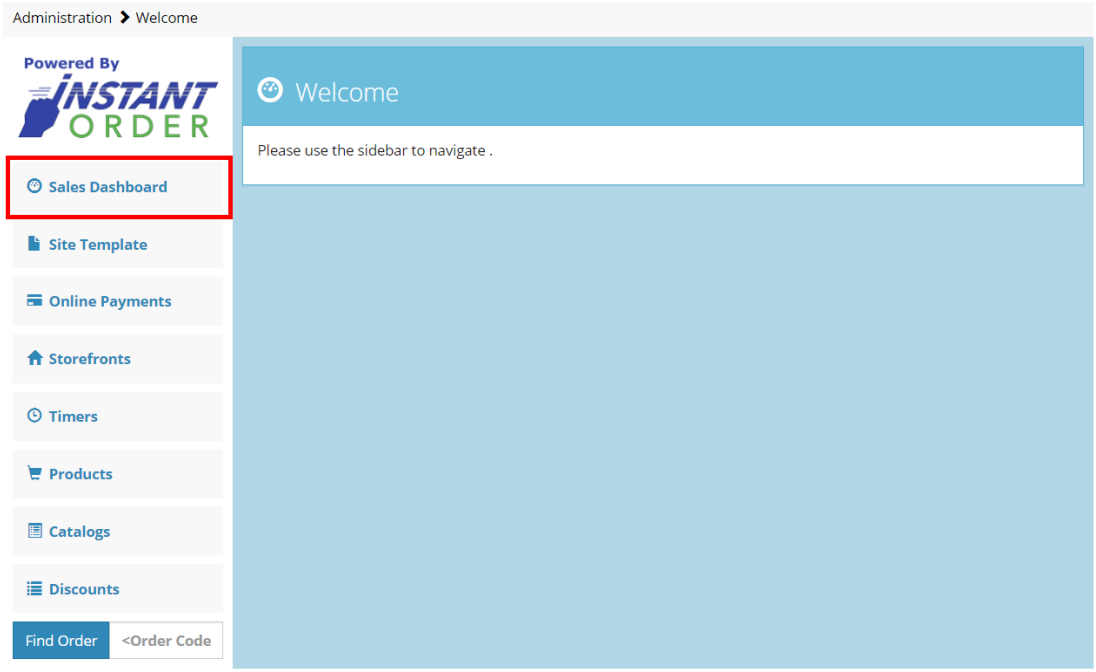
Lastly, select **Save Changes**

# How to View Sales Dashboard

The Sales Dashboard gives your business the ability to track sales and profits on your online ordering system.

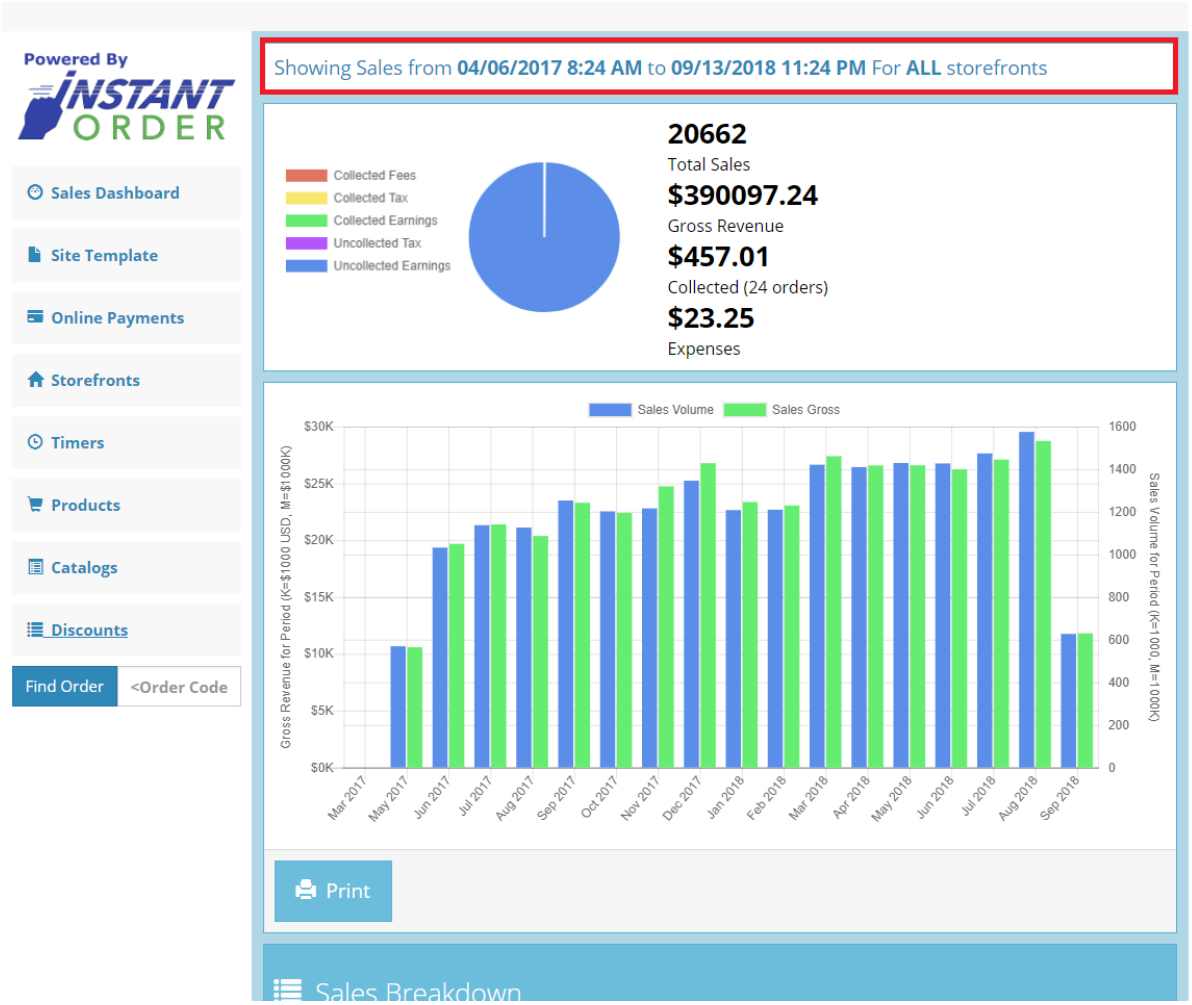
This system gives you the power to show sales records from any date range. Customer names and order totals are also tracked using this system.

First you will need to select **Sales Dashboard** from the administration panel.



This will bring you to your business's sales breakdown.

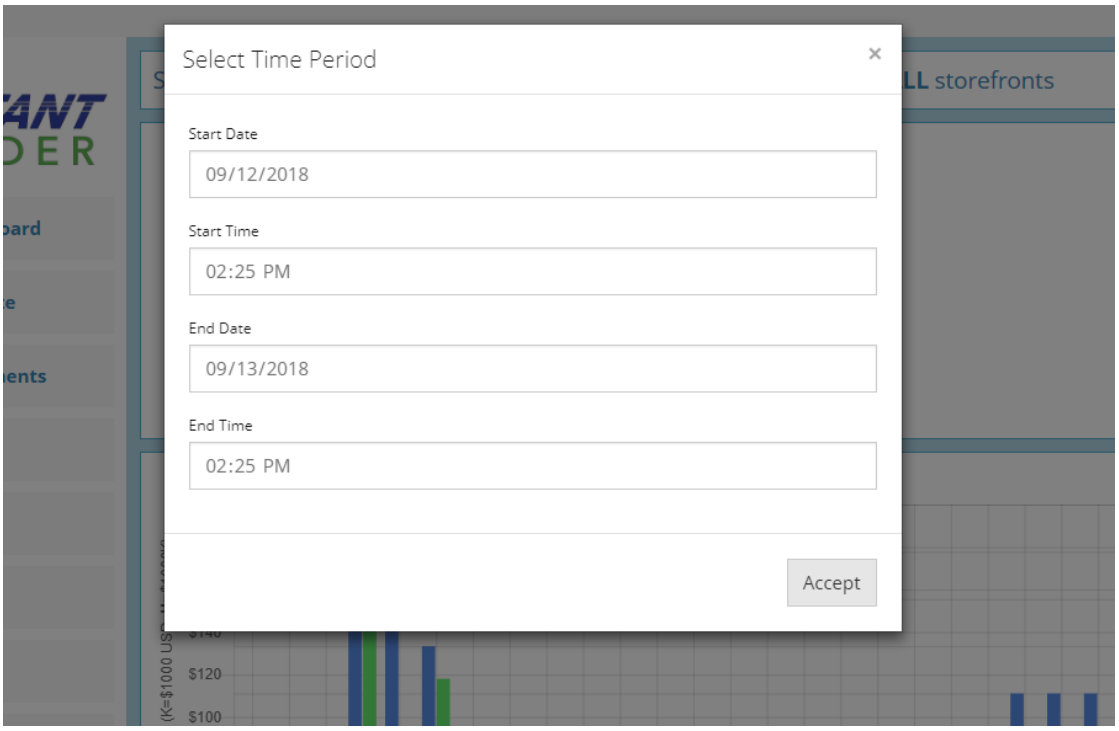
From this page you can view customers' orders, see a visualization of sales data, print data, mark orders as paid, and gather useful analytics about your business.




At the top of this page you are able to select a date and time range to view a specific data set. In order to do this you need to click on the **Showing Sales from** highlighted above.

The window bellow will appear.

Here you can select any date time range and that range will be shown on the graph on the main Sales Dashboard page.



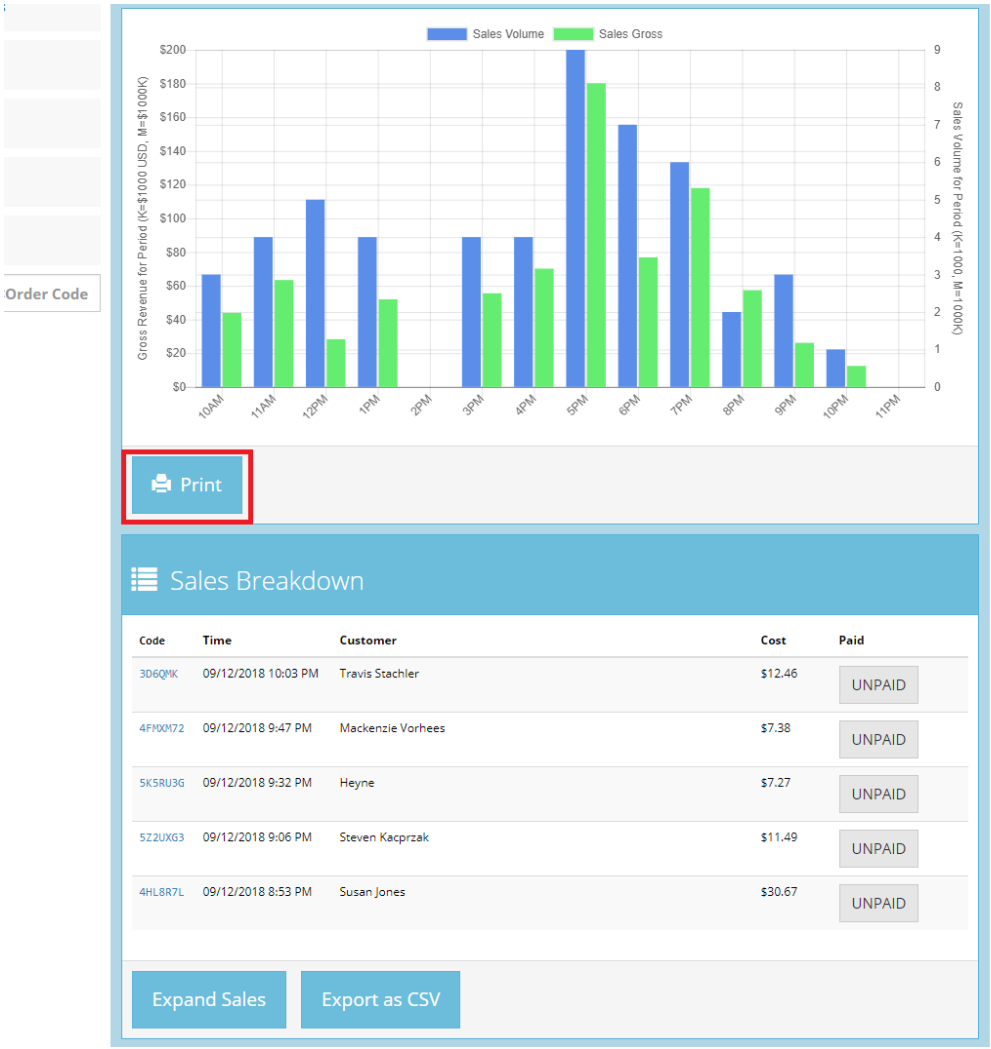

After selecting the desired date time range select **Accept** to activate the new time range.

You will now be able to visualize your online sales!

# How to Print Sales Data

Through the use of the Sales Dashboard you can also print out a hard copy of your sales data!

After selecting a time range, *as explained on page 29 and page 30*, you can start by selecting print as shown below.



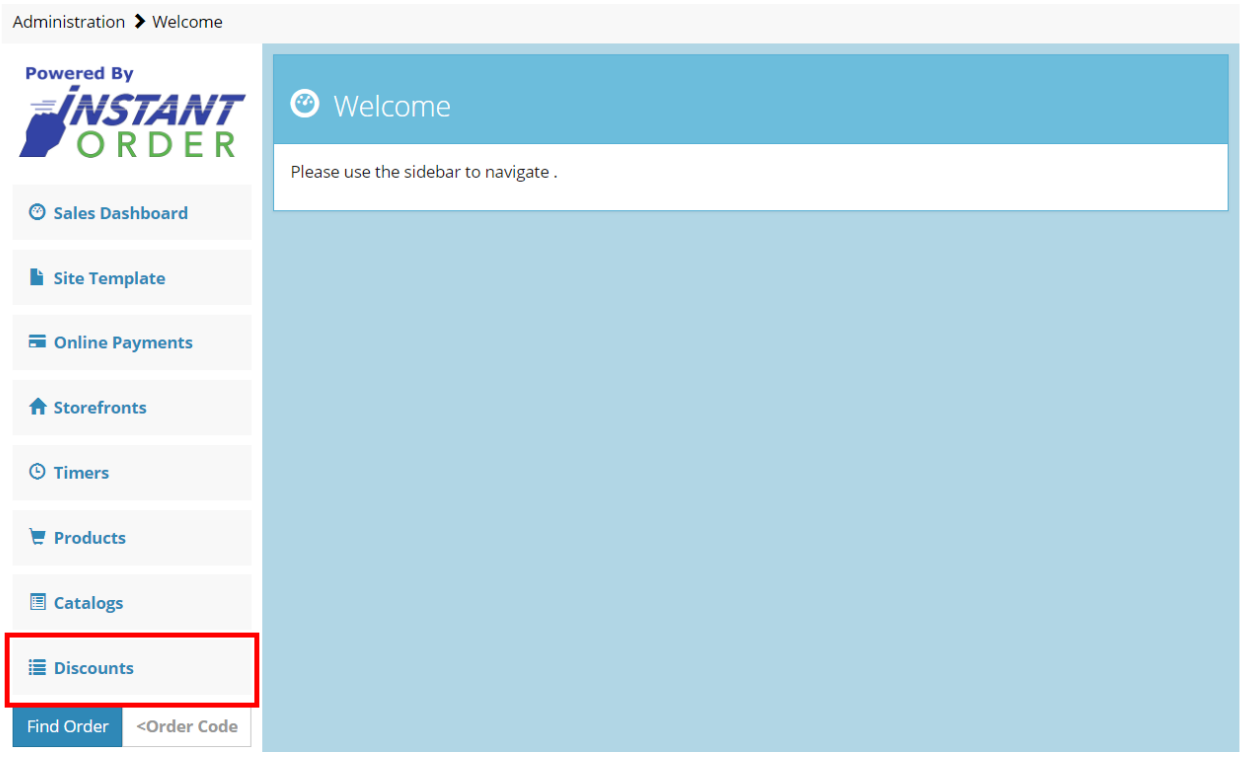

This will bring you to a print preview page.

Navigate this page as you would any other print page and enjoy having hard copies to track or show other your online sales!

# How to Discounts

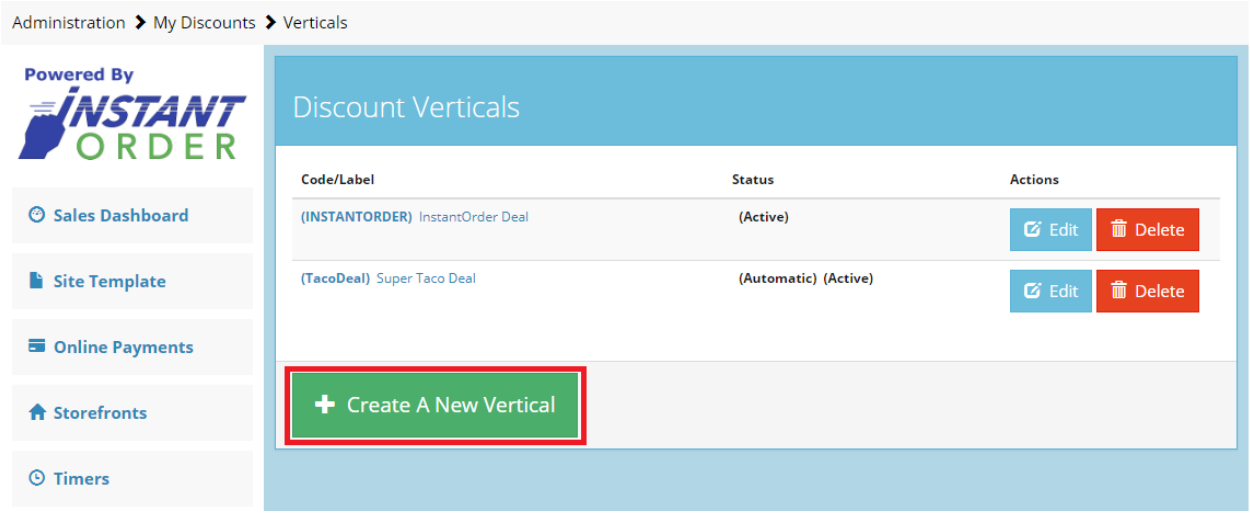
As a business it is sometimes helpful to be able to offer customers discounts and other unique deals. This next section of instructions will show how to easily create these discount codes!

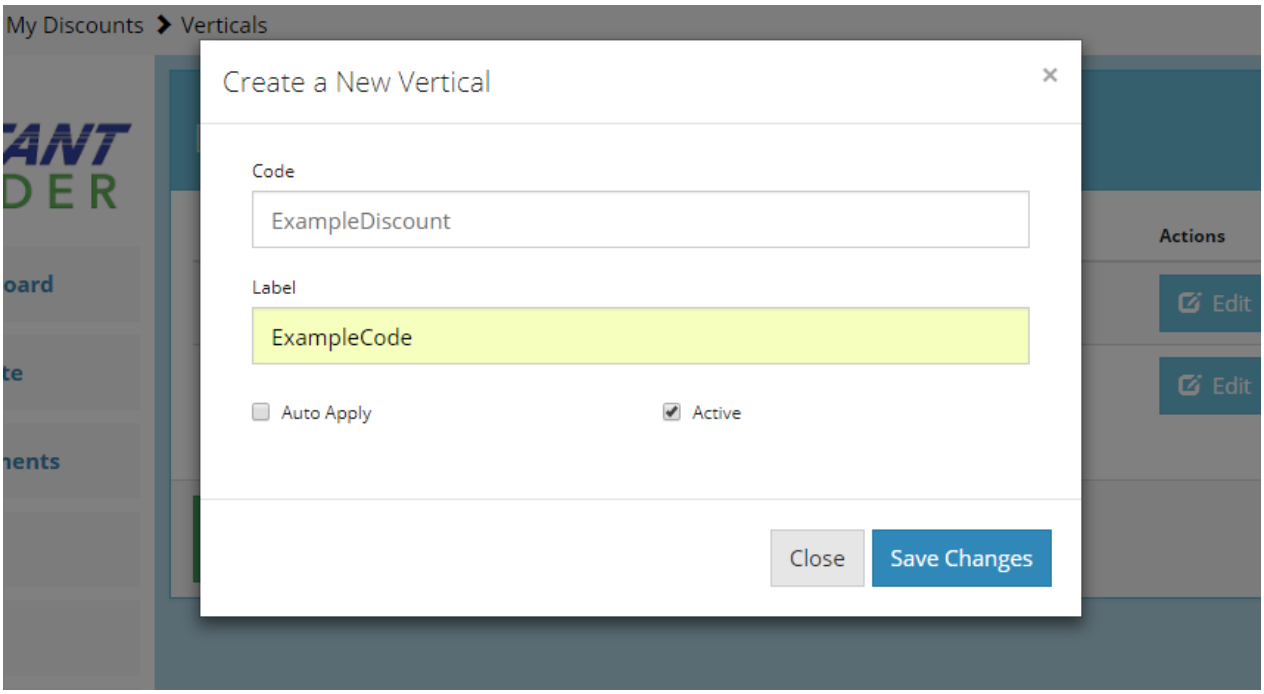
First you will need to select **Discounts** from the administration panel.




Here any previously created discounts can be viewed or edited.

To make a new discount select **Create A New Vertical**.






Here a unique code and label will be entered for your discount.

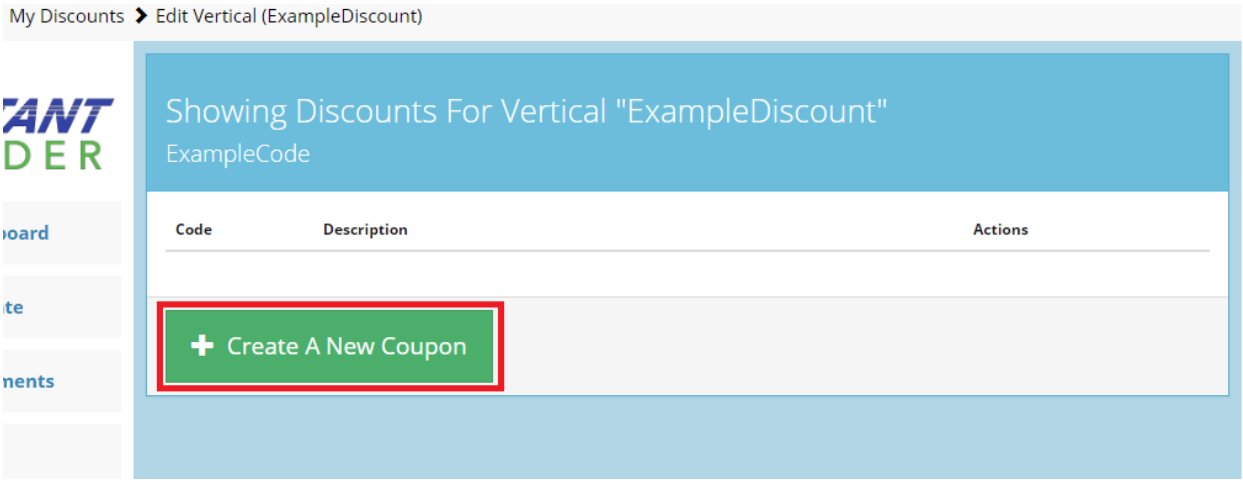
If **auto apply** is selected the code will be automatically applied to any order that meets the discounts specifications.

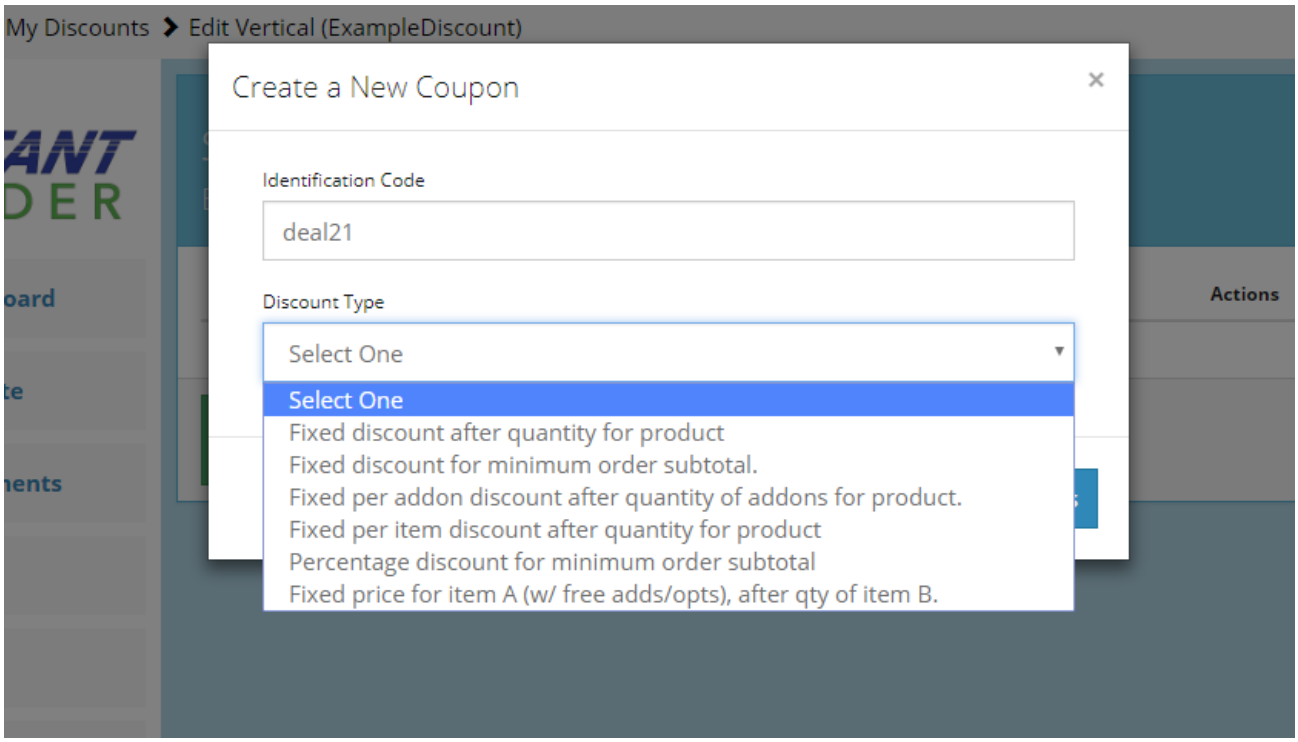
If **auto apply is not** selected the customer will have to enter the Code in to receive the discount. This can be useful for tracking the success of advertisements from different mediums.

The **active** check box is a simple way to activate or deactivate discount codes.

Once a unique Code and Label are entered and the desired check boxes are submitted select **Save Changes**

On the new page select **Create A New Coupon** as shown below.

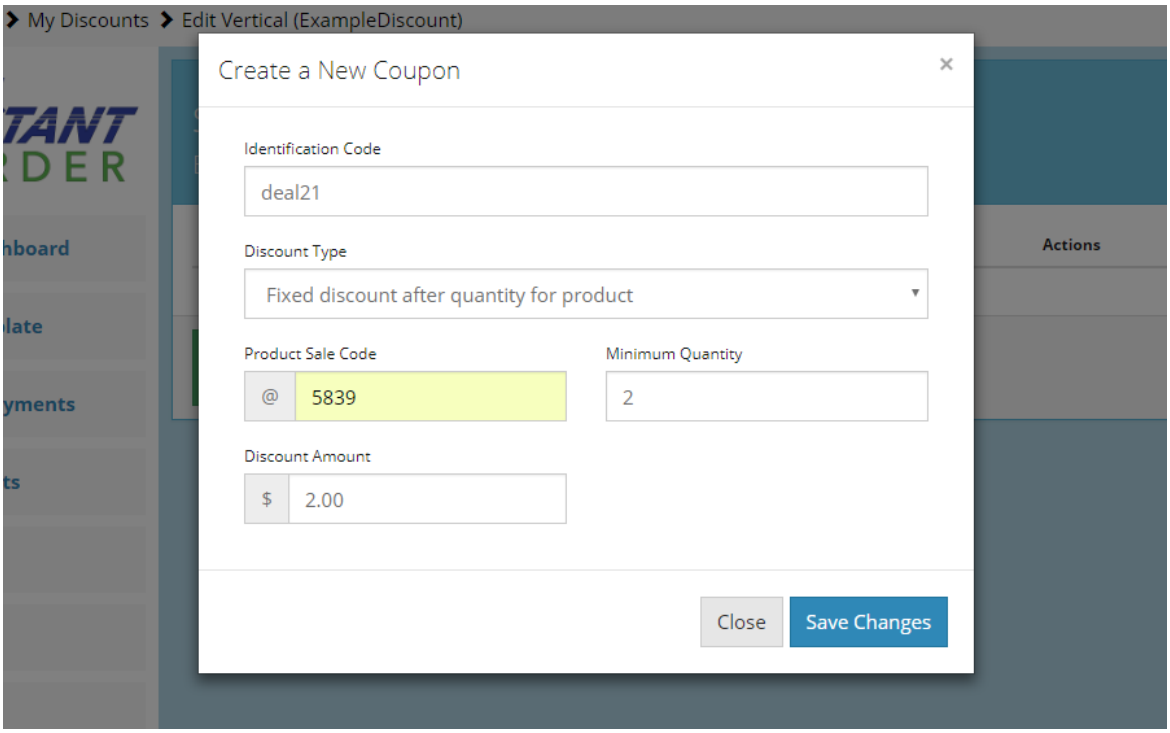





The **Identification Code** will be the code that potential customers will use in order to activate the coupon code. In this example the code is “deal21”.

The **Discount Type** drop down box contains many different types of discounts. For this example we will be using “Fixed discount after quantity for product”. This Discount Type activates a dollar amount discount after a specific number of items are placed in the cart for purchase.

Once an Identification Code new fields will appear that are required to complete this process.




Above the new fields that have appeared after selecting our discount type are shown.

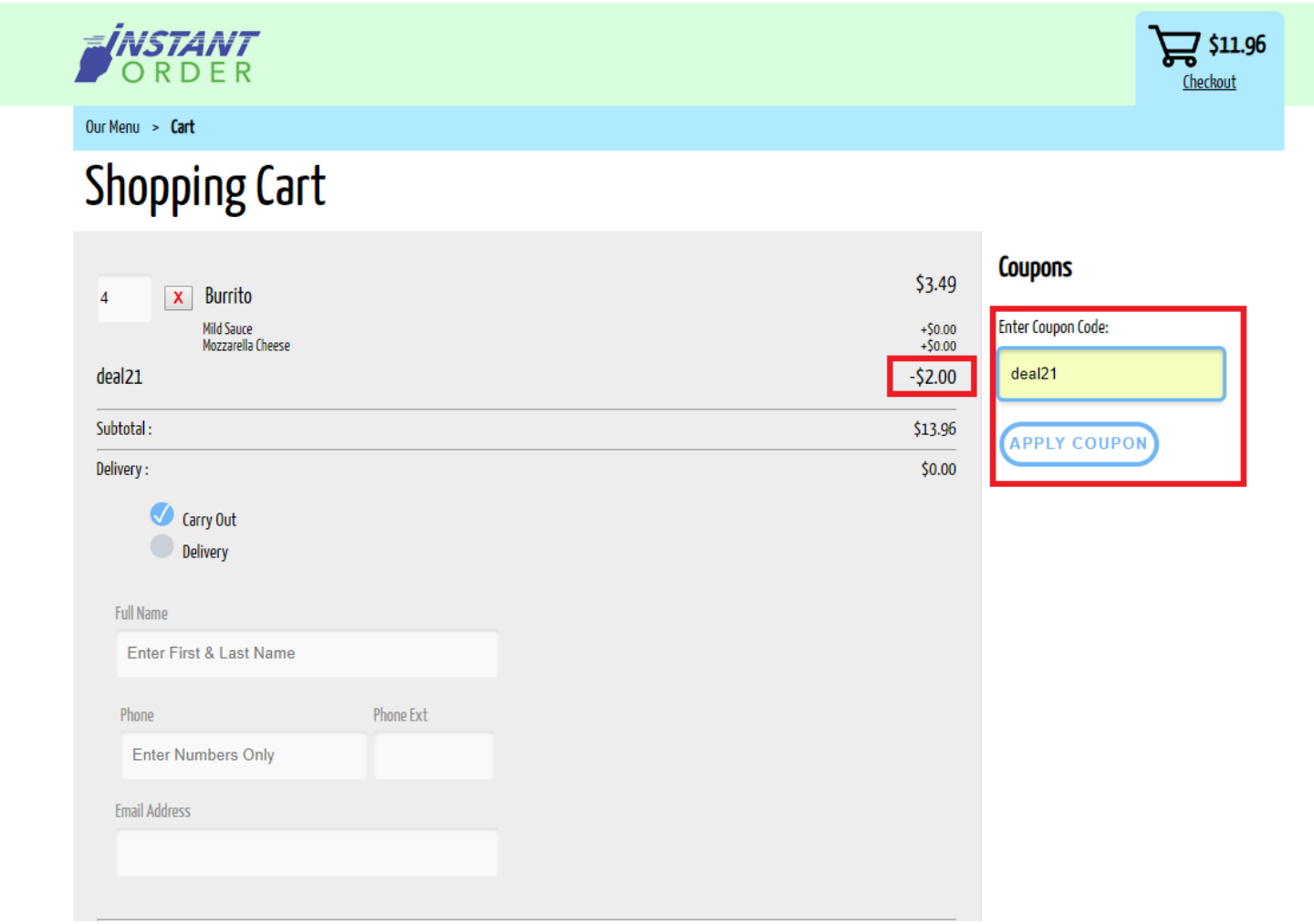
The **Product Sale Code** can be found under the specific product that the discount will effect. In this example we will be using the sale code from a burrito.

**Minimum Quantity** is the number of items that need to be in a customer's cart for the discount Identification Code to function.

**Discount Amount** is the amount of the discount that will be deducted from the order.

Once this information has been entered select **Save Changes** to activate this Discount.

Customers will be able to enter the Identification Code on the checkout page as shown below.

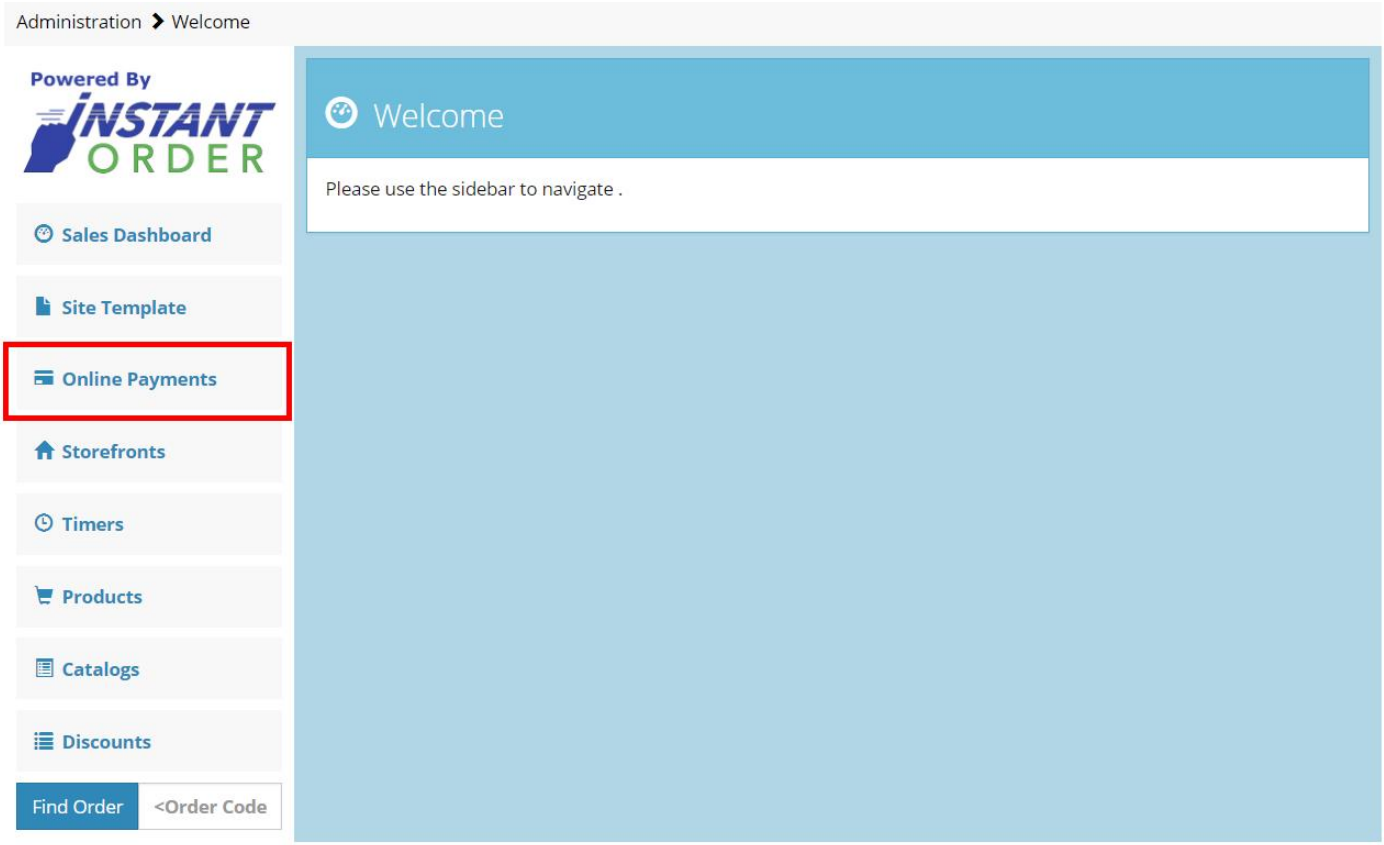


# How to Online Payments

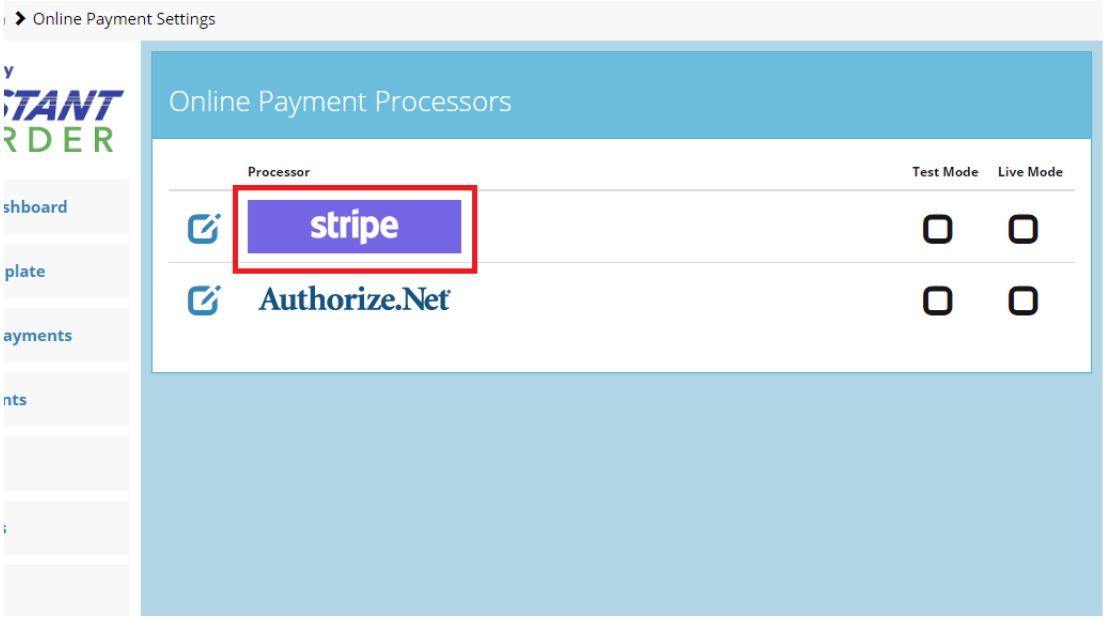
Setting up online payments will allow your customers to pay for orders online with a card. The money will then be securely deposited in the businesses account much like in store card payments.

First we will be setting up through a Merchant other than Stripe.

First you will need to select **Online Payments** from the administration panel.



From there select the **Stripe** Processor Account.

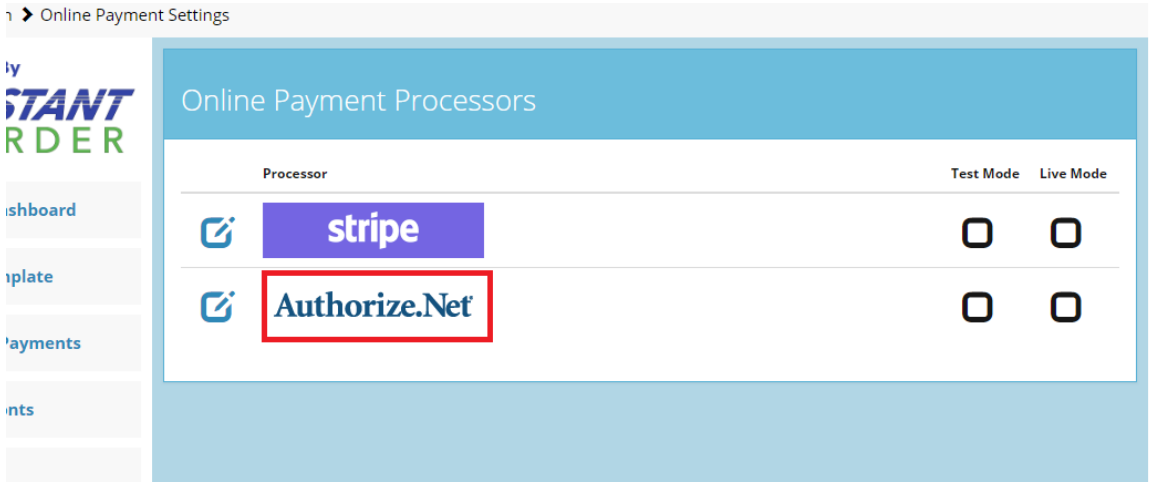



The settings screen shown below will appear.

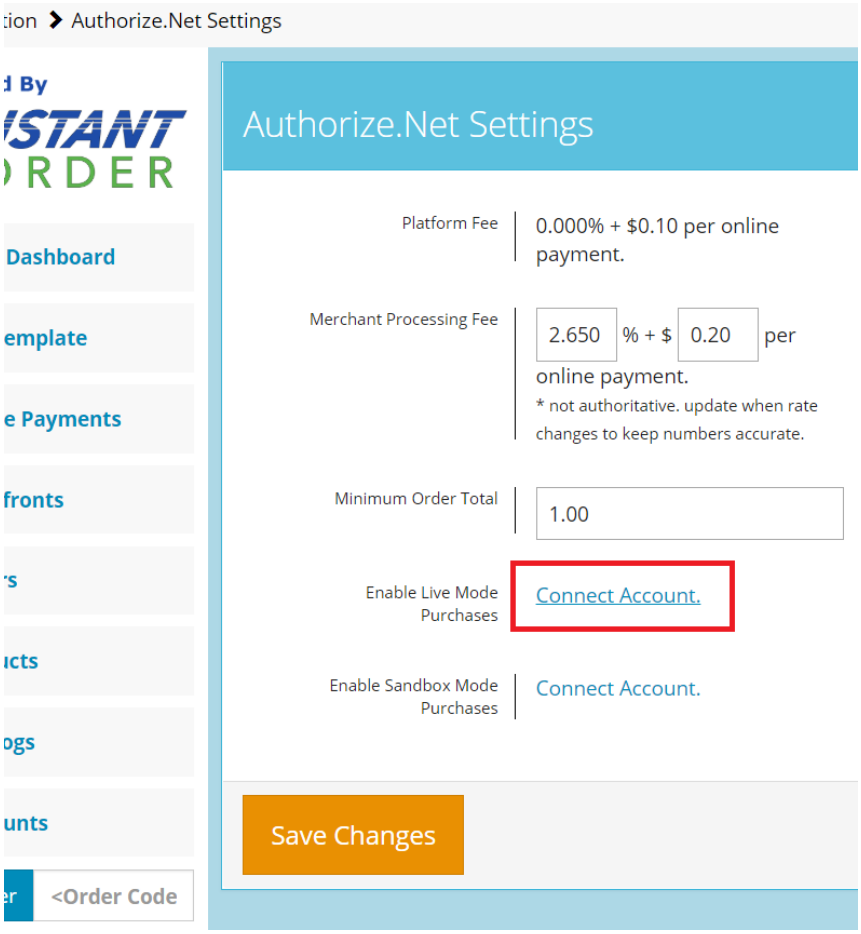
Make sure that there is no information stored here.

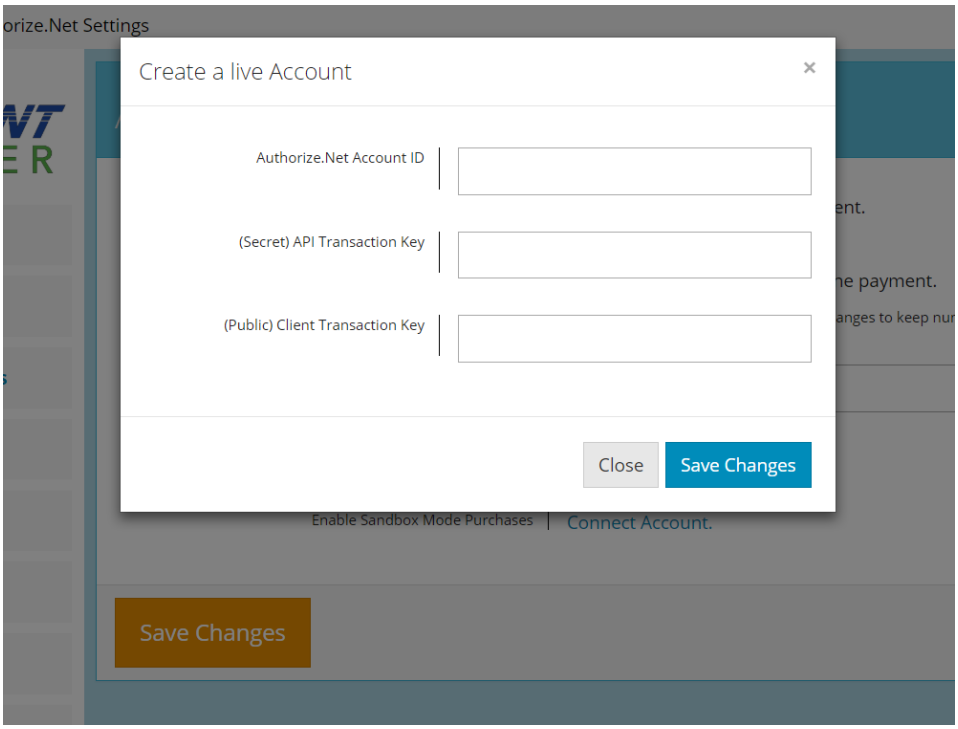
Then **Save Changes** and go back to the **Online Payments** dashboard.

From here select the **Authorize.net** Processor Account.



Then select **Connect Account** as shown below.

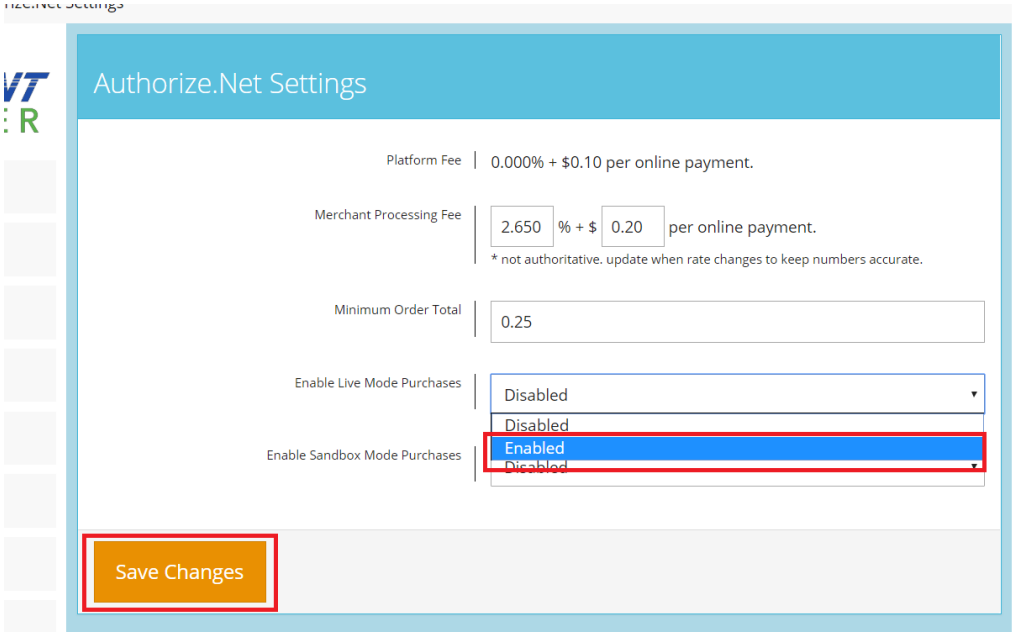





On the window above you will insert the **Authorize.Net Account ID, API Transaction Key, and Client Transaction Key**. These values will be provided by your merchant, or in this example Talus Payments.

Once the information is filled out select **Save Changes**.

Finally, select the new drop down to the right of **Enable Live Mode Purchase** and choose **Enabled** as shown below.

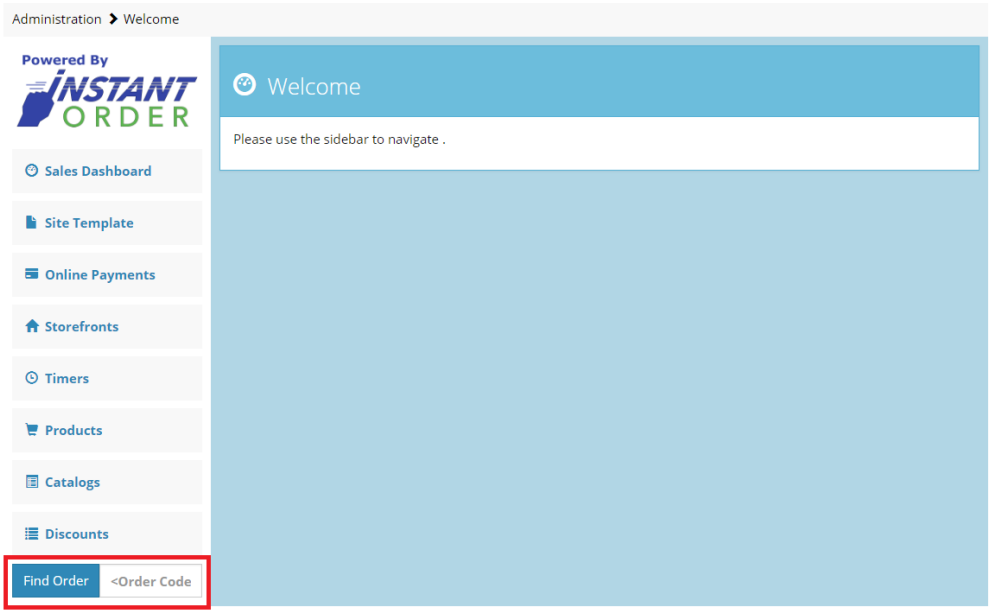


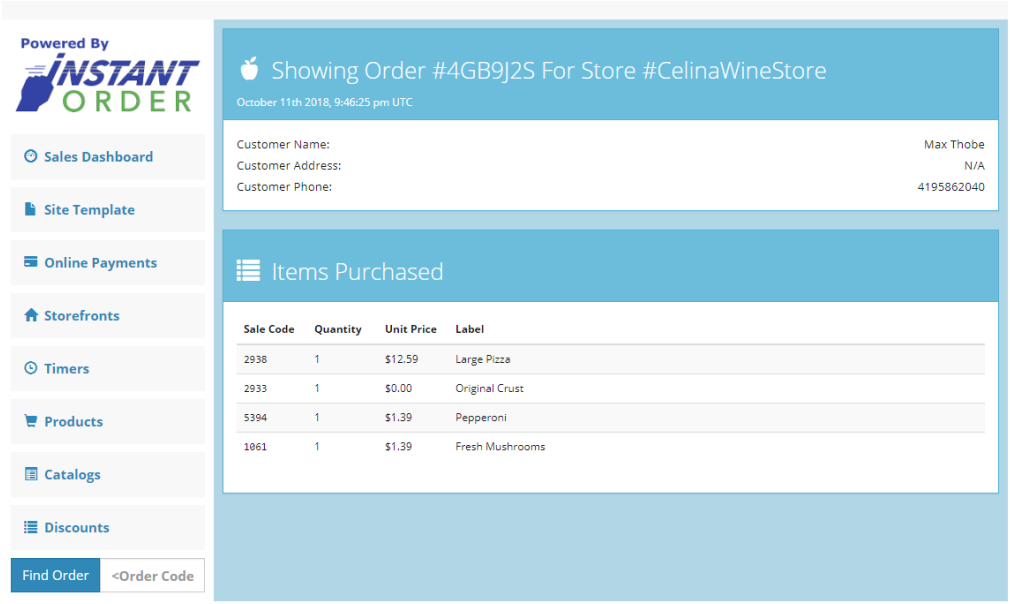

Select **Save Changes**.

# How to Find an Order

If any situation arises where a specific order that has been placed need to be located in the system there is a very simple way to do so.

Finding an order is as simple as going through your businesses automatic order receipt emails to find the order number and searching for the order in the box shown below.




This page will then show you all the information on the specific order as shown below.