Mobile Ordering

December 16, 1pm EST

Ask a Question at Any Time!

Questions will be addressed at the end of the webinar.

Visit our Knowledge Base at **kb.clubessential.com**

Please note: This webinar is being recorded. The recording will posted on kb.clubessential.com within 48 hours following the webinar.

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&
Justin Brown

Use Case Scenario / Agenda

Mobile Ordering empowers your members to quickly and conveniently order food from your Club's Mobile App, for pick-up or delivery (optional) at Club locations.
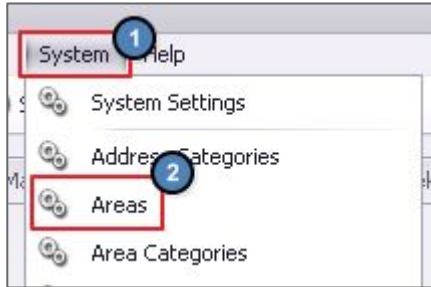
In this webinar, we will discuss:
- Area Set-up
- Menu Creation
- Member Access-Mobile Ordering on the App
- How your club can utilize this feature for Holiday Menus, Catering or To-Go Orders.

To Configure Mobile Ordering for an **Area**, go to **System**, then **Areas**.

Areas are used to specifically configure the menus shown in the Mobile Ordering tool.

The purpose of creating a new Area for each location accepting Mobile Orders is to enable the Club to obtain sales demographics, based on all orders coming from the Mobile Ordering Tool.

Select the designated Area to configure your menus.
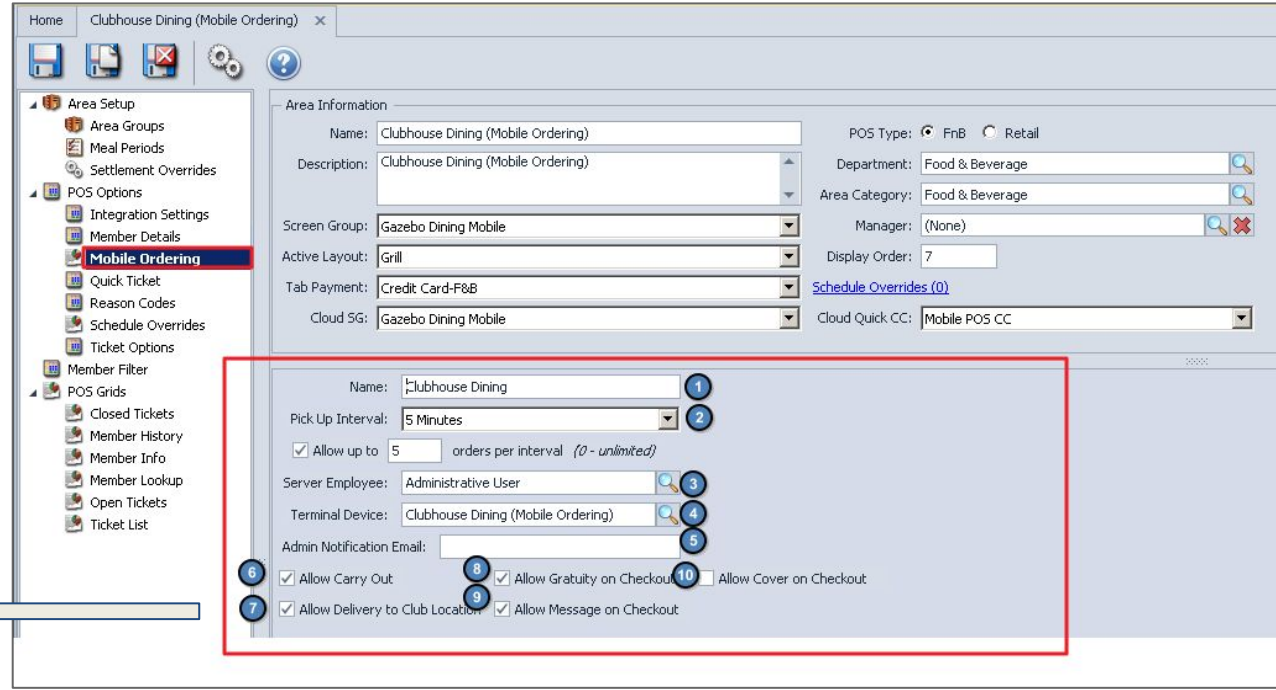
Please Note: *The Mobile Ordering setting must be enabled in POS Options. This step will have been checked during Implementation. To verify this setting is configured, go to POS options, and enable (check) the Mobile Ordering setting.*
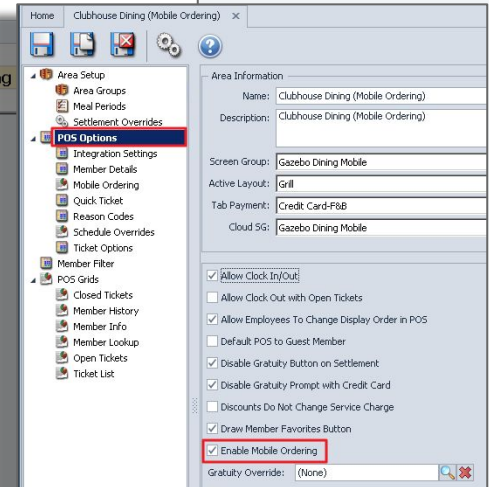
Area Set Up-Mobile Ordering

On the **Mobile Ordering** tab, configure the following settings.

1. **Name**
2. **Pick Up Interval**
   a. **Orders Per Interval**
3. **Server Employee**
4. **Terminal Device**
5. **Admin Notification Email**
6. **Allow Carry Out**
7. **Allow Delivery to Club Location**
8. **Allow Gratuity on Checkout**
9. **Allow Message on Checkout**
10. **Allow Cover on Checkout**
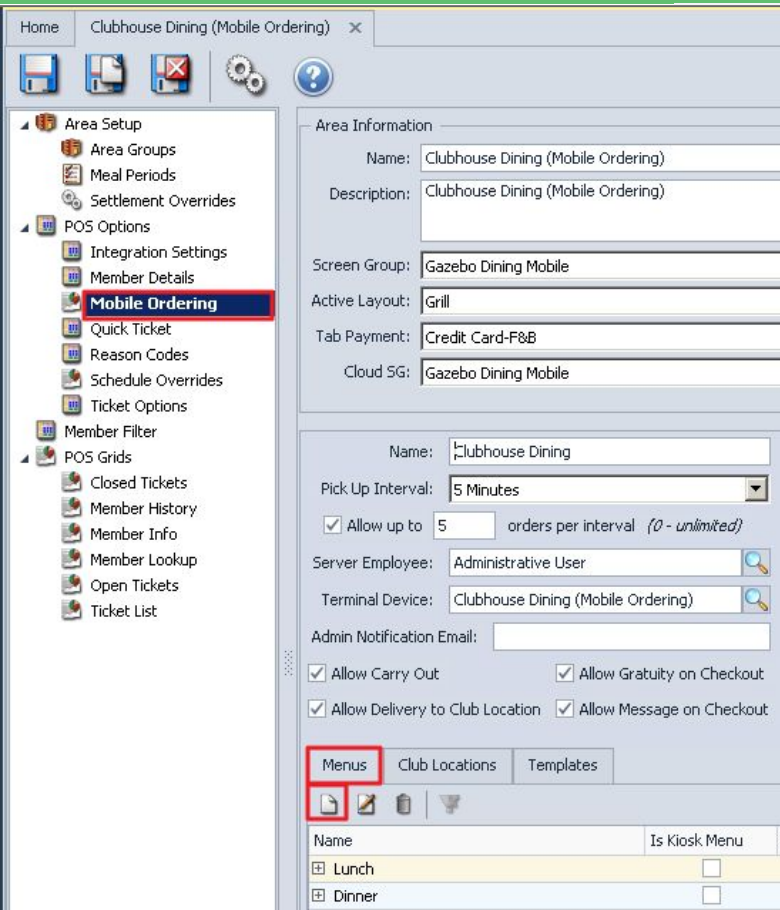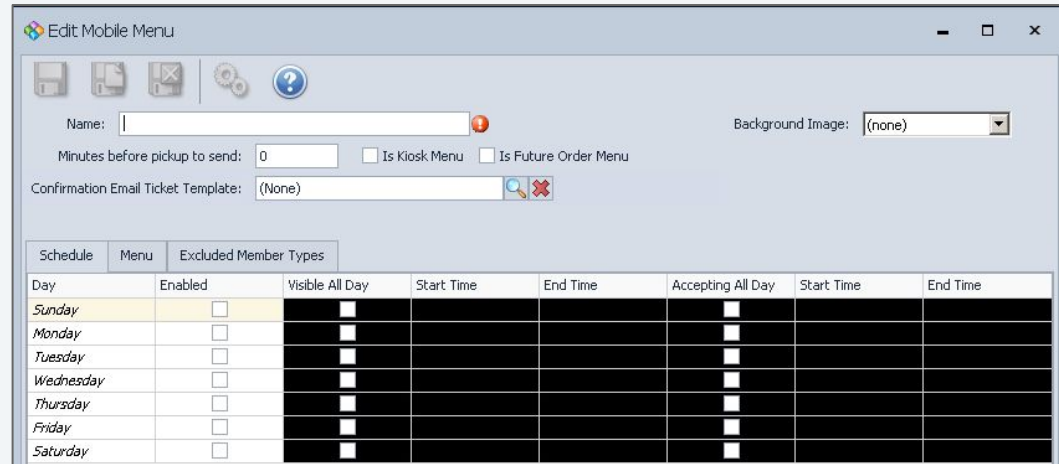
Now it's time to create the **Menu(s)**.
Click the **New** icon and a Menu Configuration screen will appear. Menu examples can be Lunch or Dinner.

Complete the Menu Screen

1. **Name**
2. **Minutes before pickup to send**
3. **Is Kiosk Menu**

Checking this setting will remove this menu visibility from the mobile app and this menu will only be available on Mobile Ordering kiosk devices.
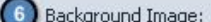
4. Is Future Order Menu

Future Ordering Menus can now be configured to automatically print with a **Minutes Before Pickup to Send** Setting.

Users will now see two options when a menu is configured to be Is Future Order Menu:

1) **Minutes Before Pickup to Send**
2) **Future Order Hours to Prep**.

Confirmation and Image

5. Confirmation Email Ticket Template

6. Background Image

Schedule

1. **Enabled**
2. **Visible All Day***
3. **Accepting All Day***

This will disable the Start/End time for that specific day

Menu-Create Categories and Search Items

Establish the **Categories** such as Appetizers, Salads, Entrees, that will house the Menu Items.

Once the **Category** has been created, search for an Item (from a list of existing items) by clicking the search icon to launch the item selector.
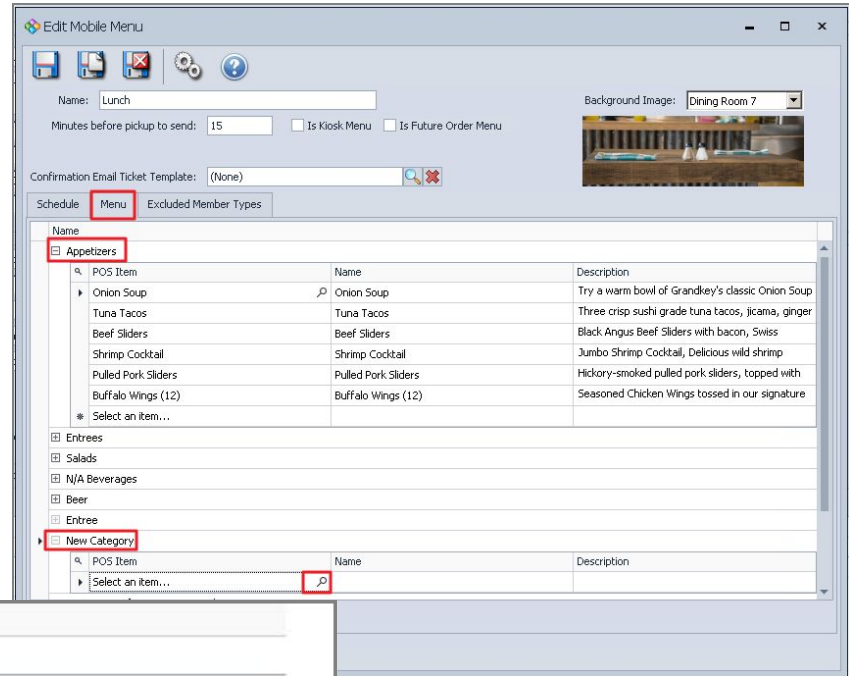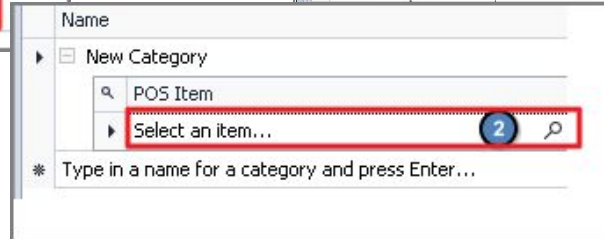
Tips when Searching for an Item:

1. Start by Typing the name of item.

2. To simplify search, limit results to F&B Items, Remove Columns that are not useful and apply Item Category Filter.

Select Item

Place a check in the box to select the item.

Click **Select** to add to the Grid. Optional: Rename the Item and add description for mobile ordering.

Multiple Items can be added at once by selecting the item category, filter by Active Items and then click Select All to add all items at once if appropriate.

Once all items are added, **Save and Close** the Area.

Excluded Member Type

If you wish to exclude a particular member type from seeing the menu, select the member types on this tab.
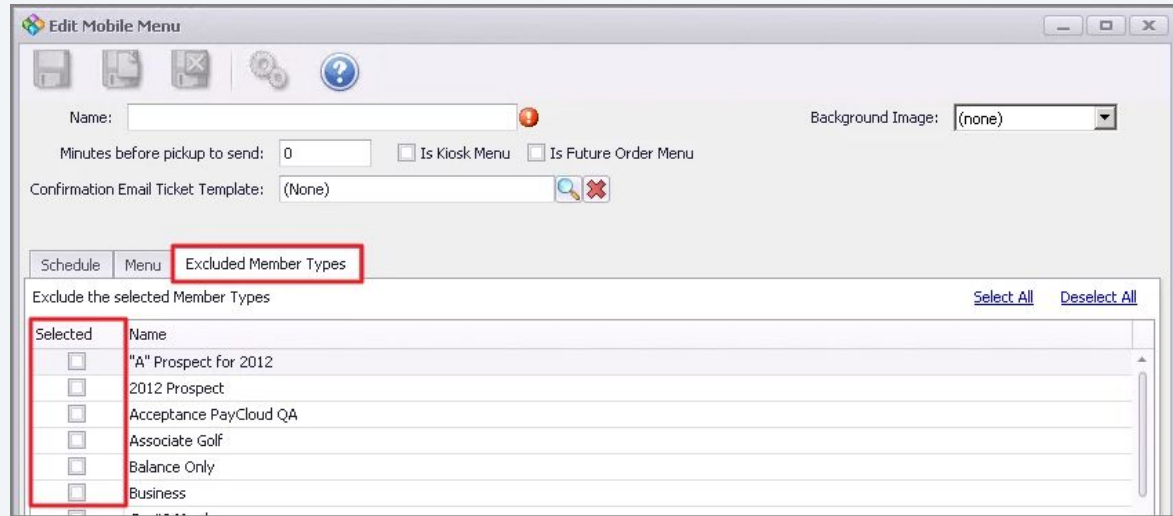
Edit Modifiers

To edit/manage modifiers for Mobile Menu:

1. Go To **Manage Items.**

2. Select the item with modifier.

3. Select **Modifiers.**

4. Click **Override Mobile Ordering Modifier Groups** Option.

5. Create New Modifier Group by clicking Lookup.

6. Select desired Modifier Groups to show.
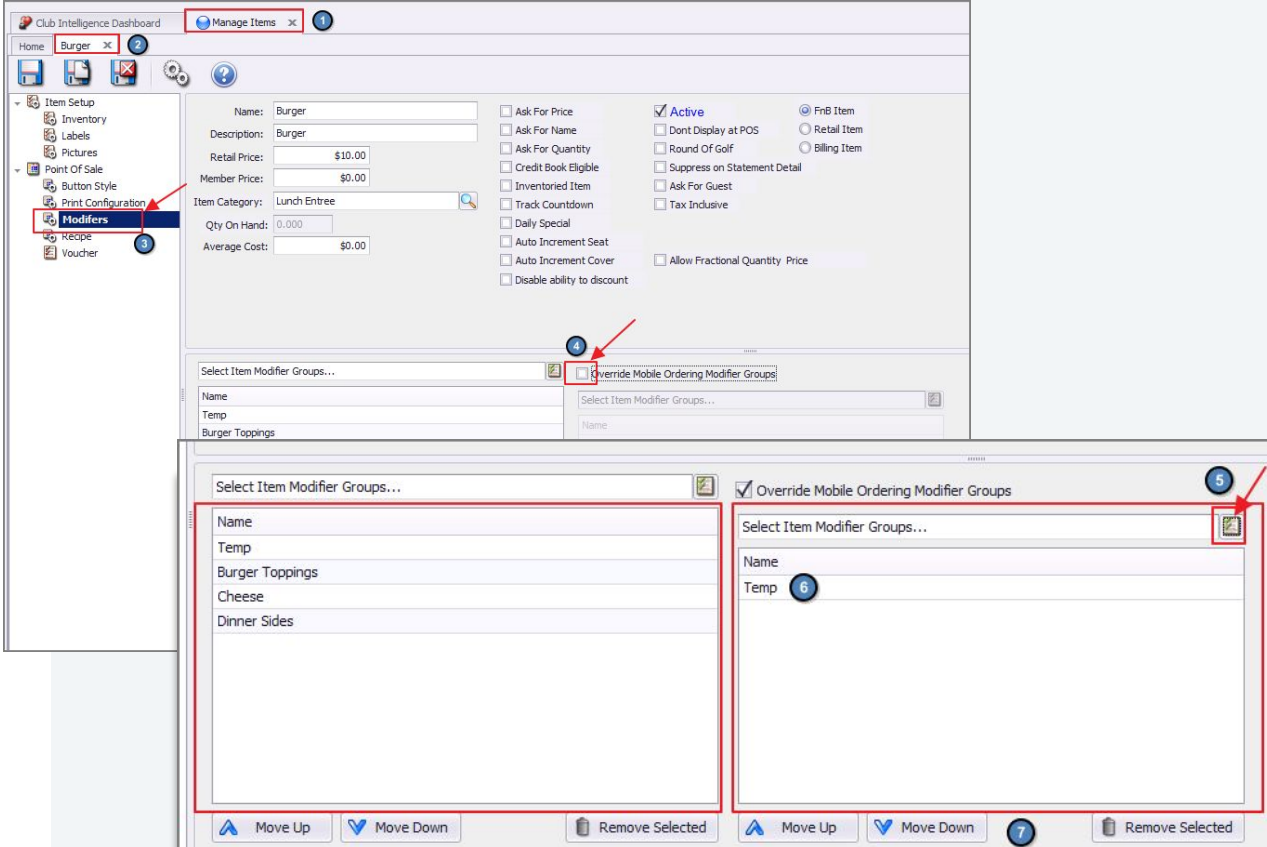
7. When complete, Modifier Group showing on the right will be for Mobile Ordering only.
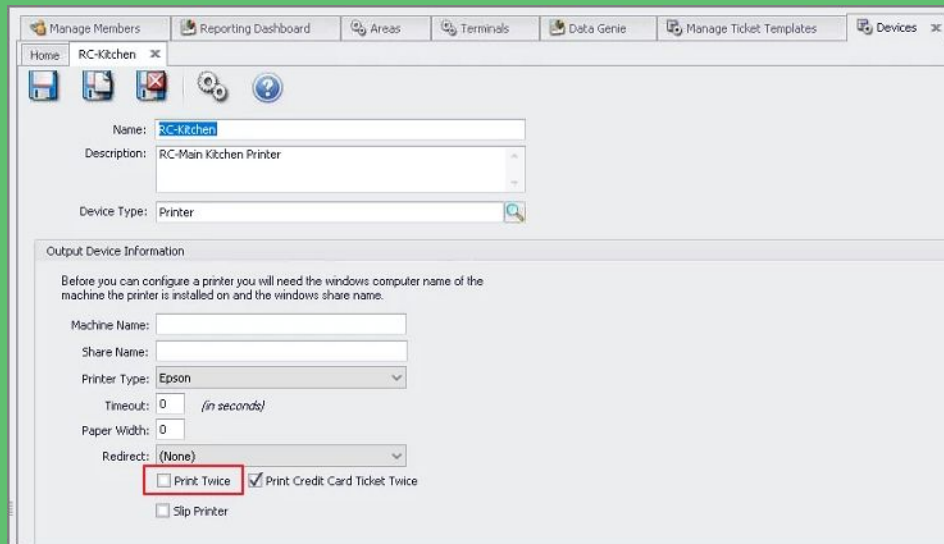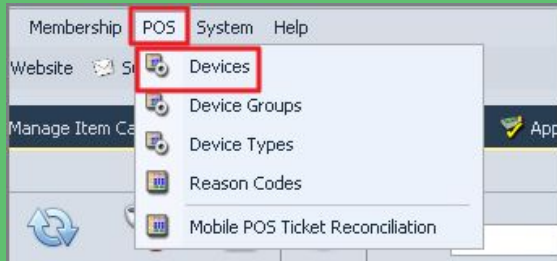
8. Save and Close.

Device Settings

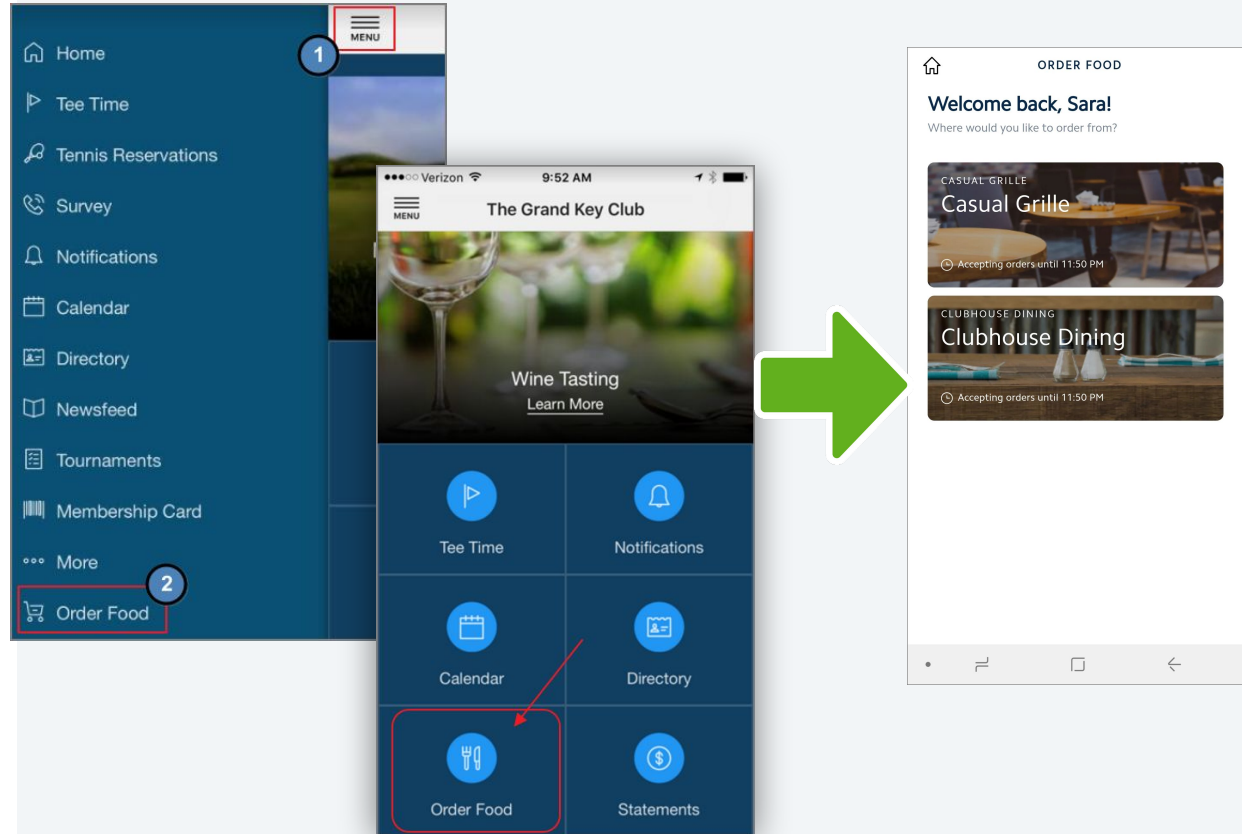Ticket Printing (Mobile Ordering)

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Member Access
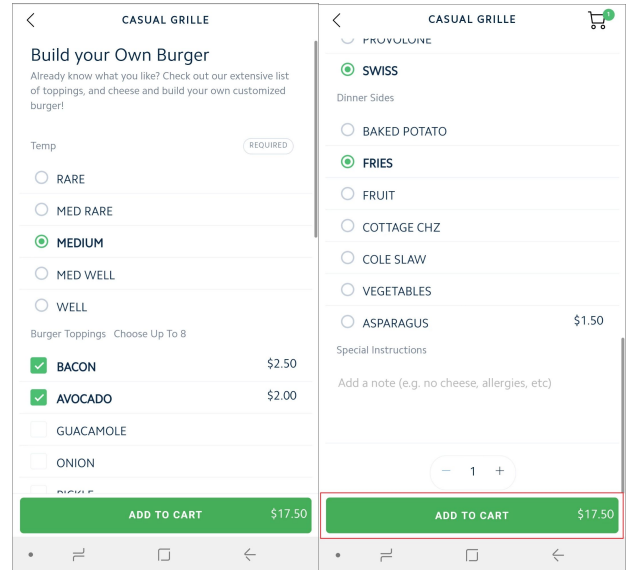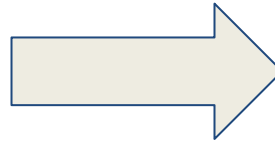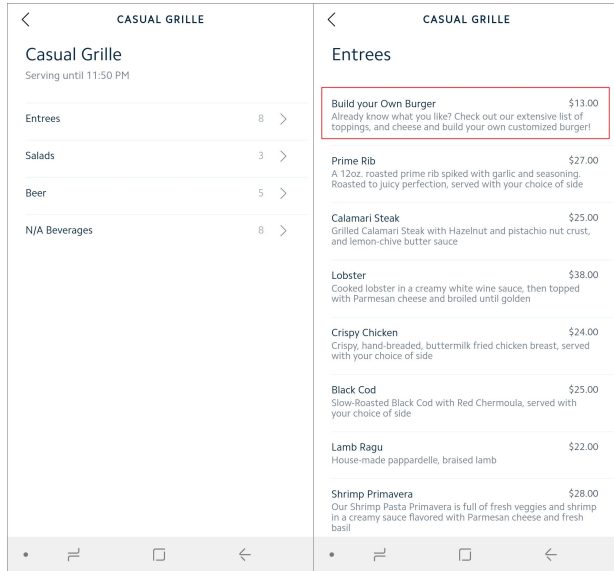
Mobile Ordering on the App

Two ways to Order:

1. Members can click **Order Food** from the main navigation

2. Click **Menu** and Choose **Order Food.**

Placing an Order

- Main Screen>Select Menu/Location to Order from.
- Top Level Menu Categories Display.
- Tap Category to see list of items.

- Modifier selections are made.
- Special instructions added.
- Add To Cart.

Order Confirmation

Once the Item has been added to cart, Member will receive a **confirmation** the item was added.

The Screen will return to the **main menu** for additional selections.

The **number of items** in the cart will display in the upper-right hand corner.

Once all items have been selected, member may tap the **Cart icon** or the **View Cart** button to review and finalize order details.
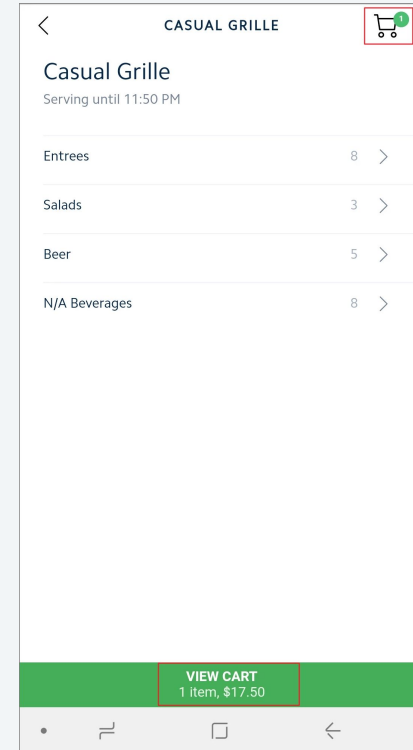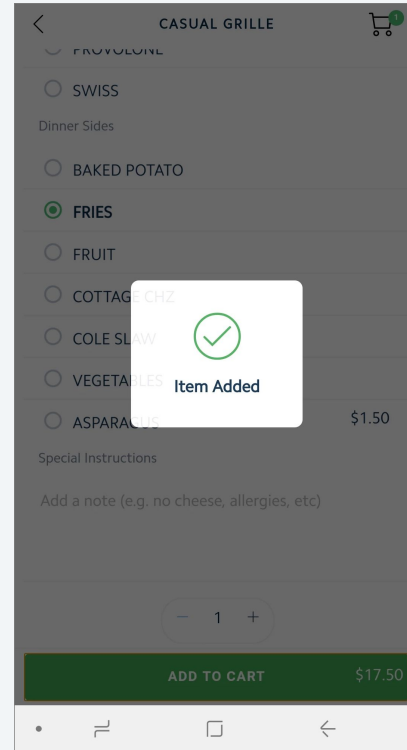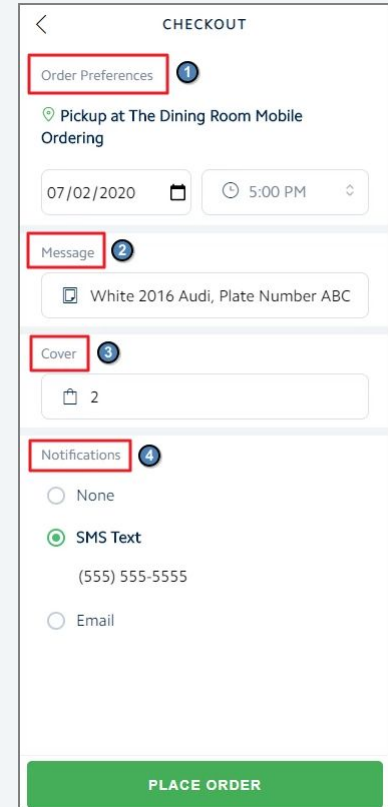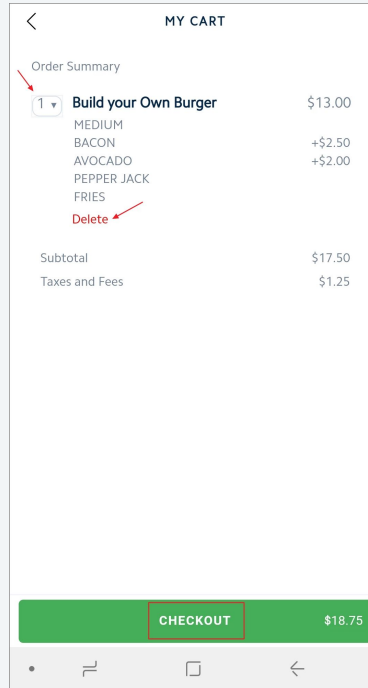
Tap the **Quantity Box** to edit the quantity of the item.

Tap Delete to remove an item from the order.

When order is complete, tap **Checkout** to continue.

Checkout Options

Order Preferences

(Based on CMA settings)

- **Pickup or Delivery (if enabled)**
- **Date/Time**
- **Message**
- **Cover (if enabled)**
- **Notifications**

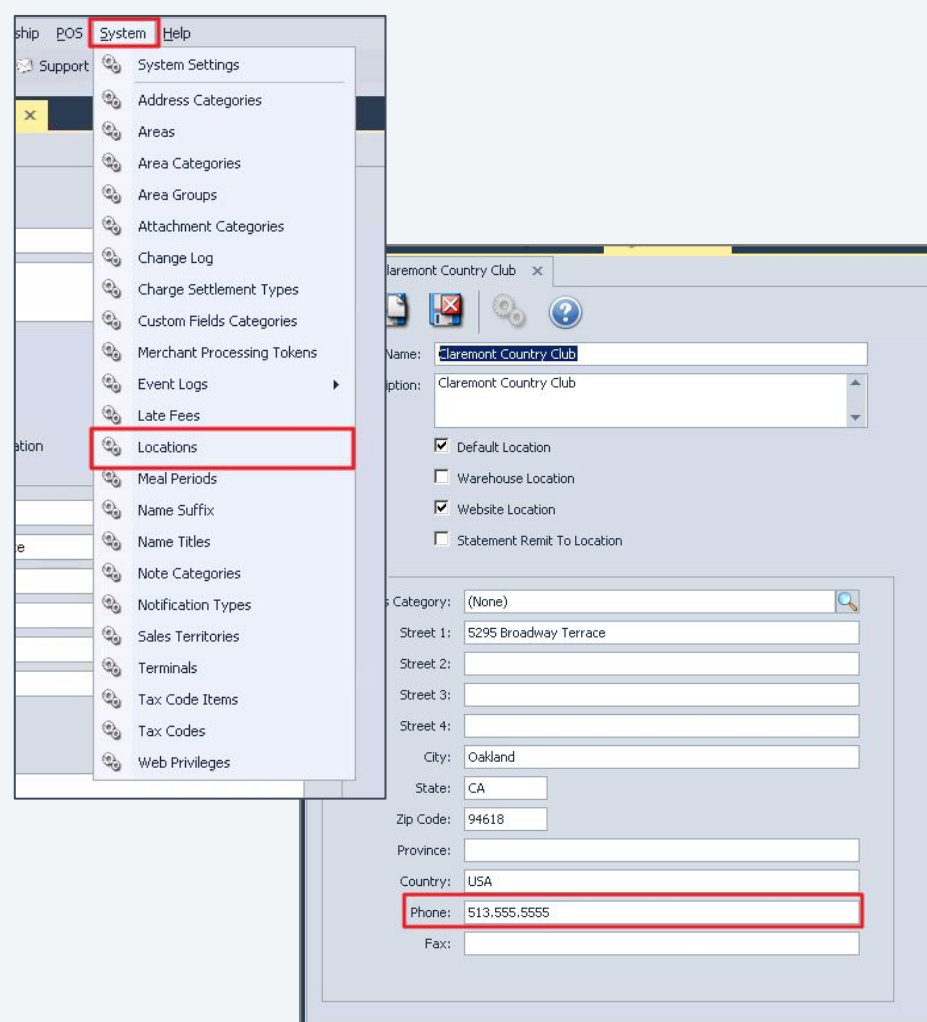## Location Settings

When using the **Text Option**, a phone number must be configured in your **CMA Location** settings.

To access this, go to **System**>**Locations**>**Phone.**
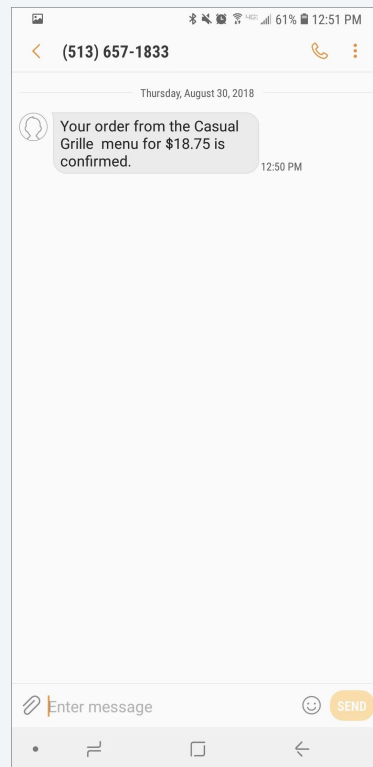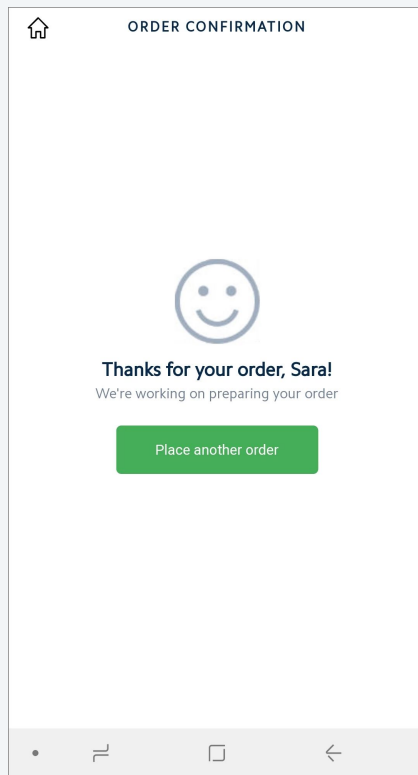
This number will be used to send a text **FROM**.

Once the order has been placed, a **Confirmation** on the ordering screen will appear.

An option to **Place another order** will appear.

Member's will also receive a **notification** the order has been received.

ORDER CONFIRMATION

Thanks for your order, Sara!
We're working on preparing your order

Place another order

(513) 657-1833

Thursday, August 30, 2018

Your order from the Casual Grille menu for $18.75 is confirmed.
12:50 PM

Enter message   SEND

Future Orders- Holiday Menus

Create a Mobile Menu specifically for Catering Options to fit the needs of a gathering of family or friends!

Customize your menu dates, times and items offered!

To Go Orders

Can't dine in? No Problem!

Provide your members with To-Go Options!

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Q&A