

Items & Menus

2018 - Spring Edition

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Overview

This guide will review how to **create**, **edit**, and **adjust** Items and Menus.

Use Case(s)

- Club Admin needs to create or edit a Menu for a specific event because the Chef changed the menu to include hors d'oeuvres.
- Club Admin needs to create or edit Items for an event because inflation has caused a price increase for labor and the client wants to add linens to the tables and chairs for the event.

Accessing the Tool

Within Reserve, **Settings** can be accessed at any time from the left hand navigation panel.



Items

Creating New Items

To create a new **Item** follow the steps below:

1. Settings
2. Event Services
3. Manage Service Items
4. New
5. Complete the following fields:
 - a. Service Item Name
 - b. Description (optional)
 - c. Revenue Center
 - d. Category (optional, but used when searching)
 - e. Auto Calculate Quantity
 - i. Uncheck if there is no need to have 1 per guest. Example:
microphone
 - f. Check the bottom 2 boxes
 - i. This will update the item in all of the menus it is currently in

6. Save

Edit an Existing Item

[Video Tutorial - Editing an Existing Item](#)

This will be used when simple changes need to be made, such as a price increase or change in the description.

1. Settings
2. Event Services
3. Manage Service Items
4. Find Item and Click **Edit**
5. Make the Change
6. Check the bottom 2 boxes-this will update the item in all of the menus it is currently in
7. **Save**

Menus

Creating New Menus

1. Settings
2. Event Services
3. Manage Service Menus
4. New
5. Fill in
 - a. Service Menu Name
 - b. Category
 - c. Pricing Type
 - d. Set Quantity to Event Attendance
 - i. Uncheck if you will not need 1 per guest
 - e. Drag the Service Types you want in the menu from left side to right side
 - i. **Please Note:** This does not move items.
6. **Save**
7. Add Items to each **Service Type** as listed in directions above.
8. Done

Adjusting Current Menus

[Video Tutorial - Adjusting Current Menus](#)

This will be used to add or remove items from your menus, change pricing from a la carte to package or package to a la carte.

Changing Menu from A La Carte to Package Pricing

1. Settings
2. Event Services
3. Manage Service Menus
4. Find Menu Click Edit
5. Click the Drop Down Option of Pricing Type
6. Select **Package Pricing-Percentage Amount Allocation** or **Package Pricing-Dollar Amount Allocation**

7. Click Drop Down option of **Package Pricing**
8. Select **Per Person**
9. Enter Package Price
10. Enter the price for each **Revenue Center** needed for this package. The price needs to add up to the package price or 100%.
11. **Save**

Changing Menu from Package Pricing to A La Carte

[Video Tutorial - Changing from Package Pricing to A La Carte](#)

1. Settings
2. Event Services
3. Manage Service Menus
4. Find Menu - Click **Edit**
5. Click drop down by **Pricing Type**
6. Select A La Carte Pricing
7. **Save**

Adding/Removing Items from Menu

[Video Tutorial - Adding/Removing Items from Menu](#)

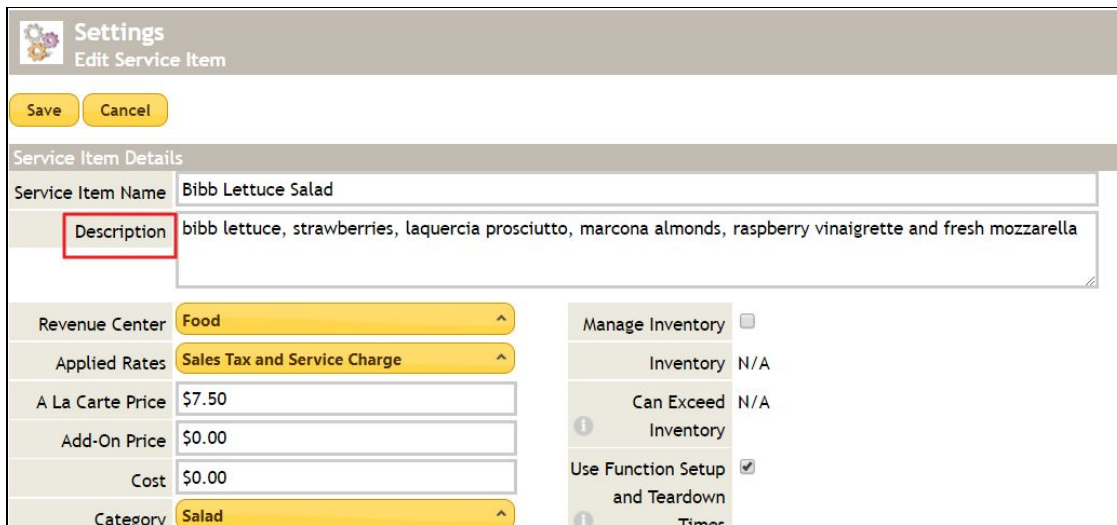
1. Settings
2. Event Services
3. Manage Service Menus
4. Find Menu, Click the Menu Name
5. Click Delete next to an item to remove it or Click Add Items
6. Find the items you would like to add and check the box in front of them (use search bar if needed)
7. Add

8. Once all items are added click **Done**

FAQs

Q: How can I add a description? For example: Coffee with the options for Decaf Coffee, Creamer, and/or Sweeteners for my Coffee Item.

A: You can add a description to each item directly under the Service Item Name in the **Description** text box. See example below.



Settings	
Edit Service Item	
Save	Cancel
Service Item Details	
Service Item Name	Bibb Lettuce Salad
Description	bibb lettuce, strawberries, laqueria prosciutto, marcona almonds, raspberry vinaigrette and fresh mozzarella
Revenue Center	Food
Applied Rates	Sales Tax and Service Charge
A La Carte Price	\$7.50
Add-On Price	\$0.00
Cost	\$0.00
Category	Salad
Manage Inventory	<input type="checkbox"/>
Inventory	N/A
Can Exceed Inventory	N/A
Use Function Setup and Teardown	<input checked="" type="checkbox"/>

Q: We are receiving new menus for this year, how can I add those to the system?

A: Please see the [Creating a New Menu](#) section for more detail.

Q: How do I add an item to an existing menu?

A: Please see the [Adjusting Current Menus](#) section for more detail.

Q: How do I only charge for half of a bottle of liquor?

A: Change the **Quantity Precision** to Half or Quarter in the item setup. See example below.

Auto Calculate Quantity	<input type="checkbox"/>	Charge Hourly	<input type="checkbox"/>
Number Required	N/A	Auto Calculate Hours	N/A
Per Number of Guests	N/A	Hours Precision	Quarter
Quantity Precision	Whole	Apply Overtime	N/A
Mark Quantity Internal	Half	Hours Charges	
Mark Item Internal	Quarter	Overtime Hours Price	N/A
		Overtime Hours	N/A
		Item Number	<input type="text"/>

Best Practices

- Double check all Auto Calculated quantities to ensure they correctly correspond with the need for one item per guest or one singular item.
- Always check the bottom two boxes for **Apply Changes to Settings Menu** and **Apply Cost Change to Function Menus** when **Updating** an Item, as seen below.

Per Number of Guests	N/A	Hours Precision	Quarter
Quantity Precision	Whole	Apply Overtime	N/A
Mark Quantity Internal	<input type="checkbox"/>	Hours Charges	
Mark Item Internal	<input type="checkbox"/>	Overtime Hours Price	N/A
		Overtime Hours	N/A
		Item Number	<input type="text"/>

Changes made to the Name and Description will automatically be applied to all Settings menus. Changes made to the Item Number, Revenue Center, Applied Rates, Category, and Category Sub Option will automatically be applied to all Settings and Function menus. Check the appropriate boxes below to apply remaining changes.

Apply Changes to Settings Menu	<input type="checkbox"/>	←
Apply Cost Change to Function Menus	<input type="checkbox"/>	←

Save Cancel