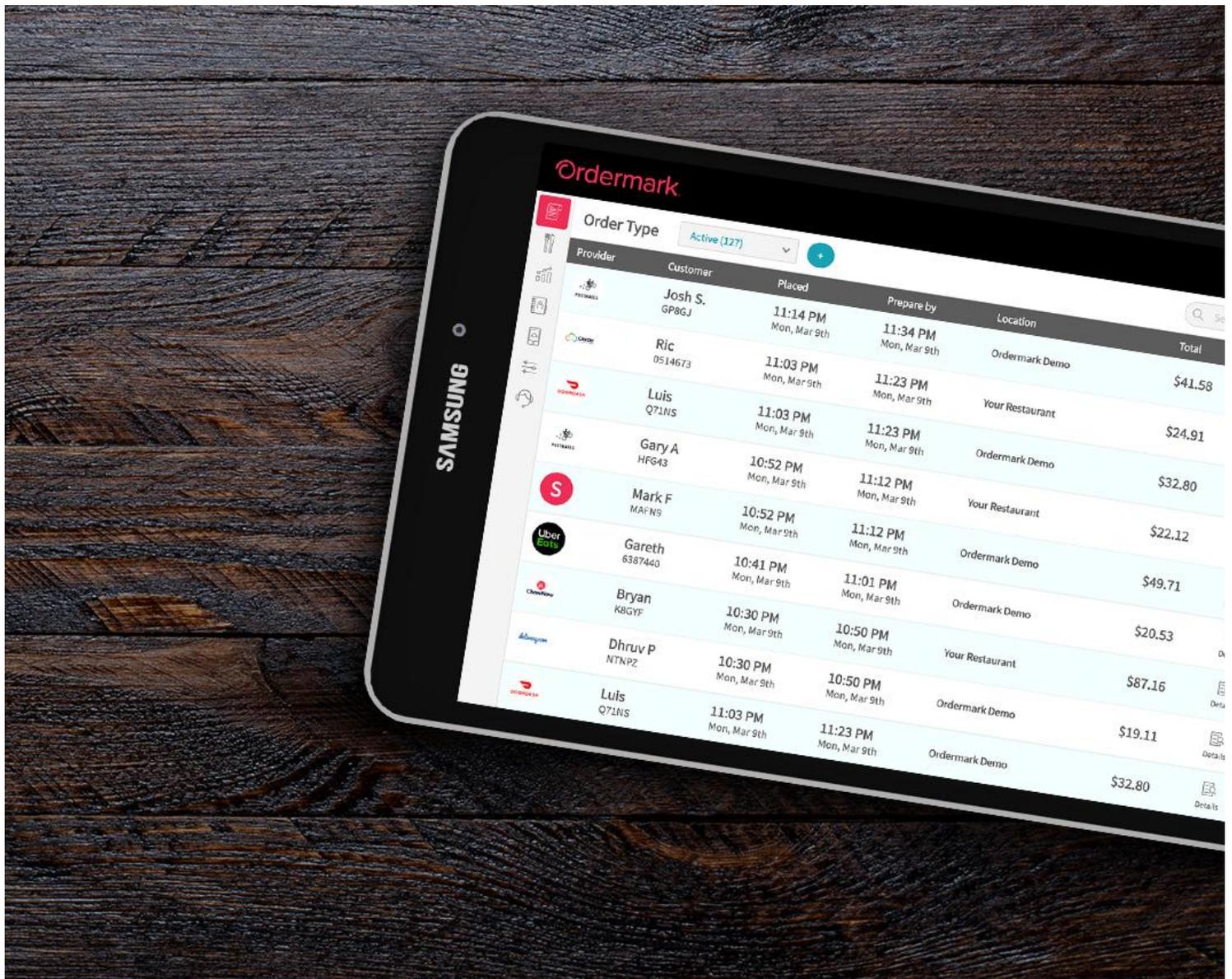


# Ordermark.

## Training Guide





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## Activate Your Ordermark System

Before we can begin processing orders through your Ordermark System, we'll need to have a quick Activation call.

**Schedule a call at** from the link sent via email

OR

**Get started immediately** - You can call **832-673-3762** and our team will begin your activation right away.

It should take just a few minutes and we'll cover...

- Getting your Username and Password for the Ordermark software.
- We'll send your printer a test ticket to make sure orders flow smoothly.
- Lastly we'll give you a quick tour and answer any questions you might have so you can maximize your online ordering business!

## Dashboard Overview

Your Ordermark Dashboard can be accessed directly from the provided tablet, or by visiting [dashboard.ordermark.com](https://dashboard.ordermark.com)

### Login Types:

You'll be provided with two separate logins that grant specific permissions.

#### Admins:

- Full change privileges
- Access to reporting
- Reach  
*(for managers, operators)*

#### Users:

- Day-to-day 86ing,
- Order monitoring,
- No reporting  
*(for staff, in-house)*

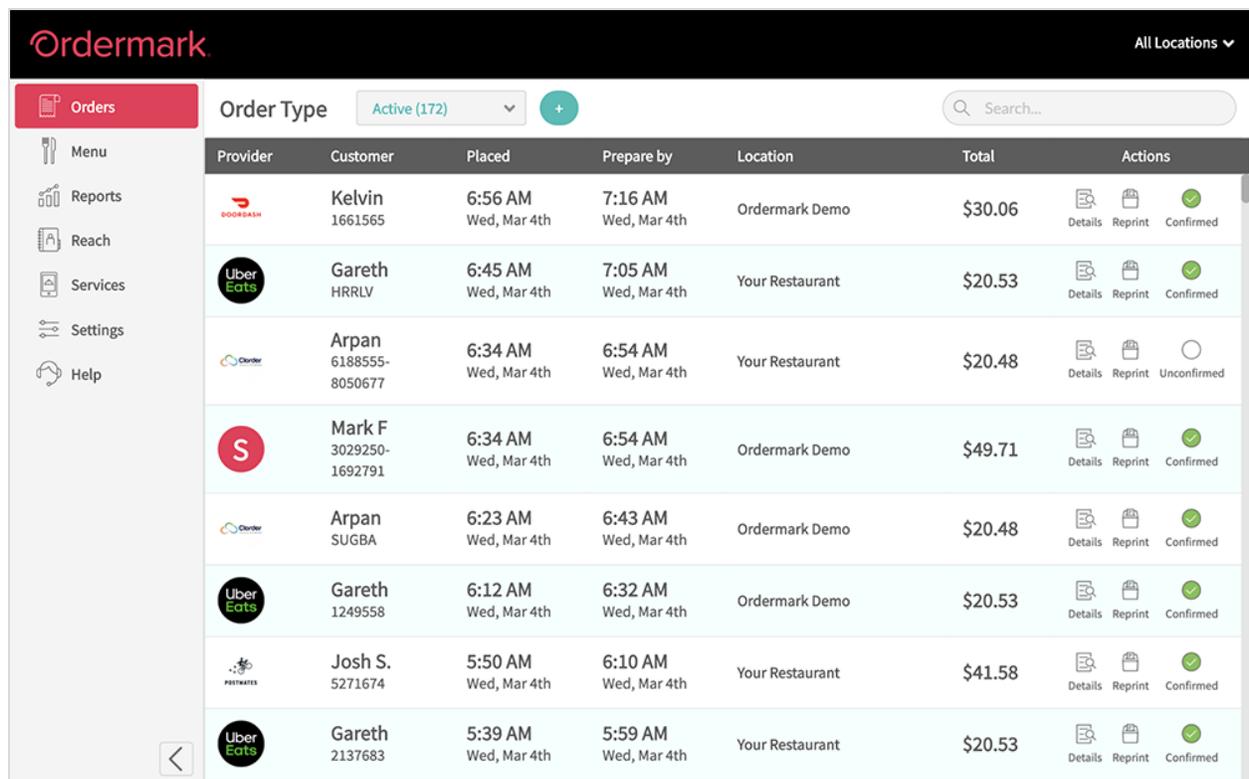
## Orders

To view a video tutorial of the Dashboard, visit [Ordermark.com/dashboard-tutorial](https://ordermark.com/dashboard-tutorial)

Incoming orders will show with the newest order at the top. With each order being automatically confirmed.

You can filter by Active, Cancelled, Future, Last 7 Days, or Last 28 days by selecting from the drop-down at the top of the screen.

From this screen, you can view when an order was placed (Placed) and what time the order needs to be prepared by (Prepare by). This time frame is based on the prep times you've set.



Provider	Customer	Placed	Prepare by	Location	Total	Actions
 DoorDash	Kelvin 1661565	6:56 AM Wed, Mar 4th	7:16 AM Wed, Mar 4th	Ordermark Demo	\$30.06	  
 Uber Eats	Gareth HRRLV	6:45 AM Wed, Mar 4th	7:05 AM Wed, Mar 4th	Your Restaurant	\$20.53	  
 DoorDash	Arpan 6188555-8050677	6:34 AM Wed, Mar 4th	6:54 AM Wed, Mar 4th	Your Restaurant	\$20.48	  
 DoorDash	Mark F 3029250-1692791	6:34 AM Wed, Mar 4th	6:54 AM Wed, Mar 4th	Ordermark Demo	\$49.71	  
 DoorDash	Arpan SUGBA	6:23 AM Wed, Mar 4th	6:43 AM Wed, Mar 4th	Ordermark Demo	\$20.48	  
 Uber Eats	Gareth 1249558	6:12 AM Wed, Mar 4th	6:32 AM Wed, Mar 4th	Ordermark Demo	\$20.53	  
 DoorDash	Josh S. 5271674	5:50 AM Wed, Mar 4th	6:10 AM Wed, Mar 4th	Your Restaurant	\$41.58	  
 Uber Eats	Gareth 2137683	5:39 AM Wed, Mar 4th	5:59 AM Wed, Mar 4th	Your Restaurant	\$20.53	  

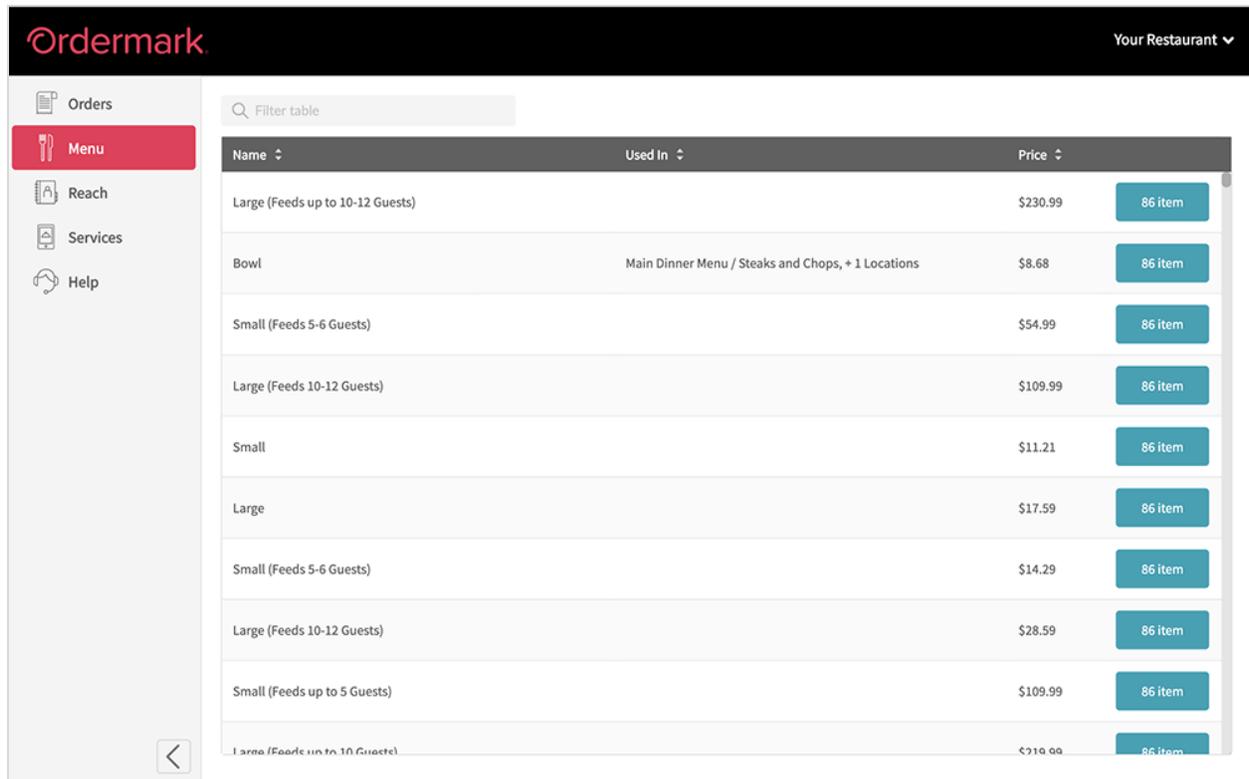
**To view an itemized view of each order, click into “Details”.**

From here, you can send order issues to the Ordermark Support team by typing out your issue and pressing “Submit”.

**To reprint a ticket**, click the printer icon “Reprint” and a ticket will immediately print again.

## Menu - Sync Quick Control (Users)

In-house staff has access to necessary menu changes, such as 86ing, directly from the tablet. To 86 a menu item, visit the “Menu” tab.



You can scroll, or use the search bar, to find any item you wish to 86.

Simply select 86 Item, and confirm the change from the pop-up.

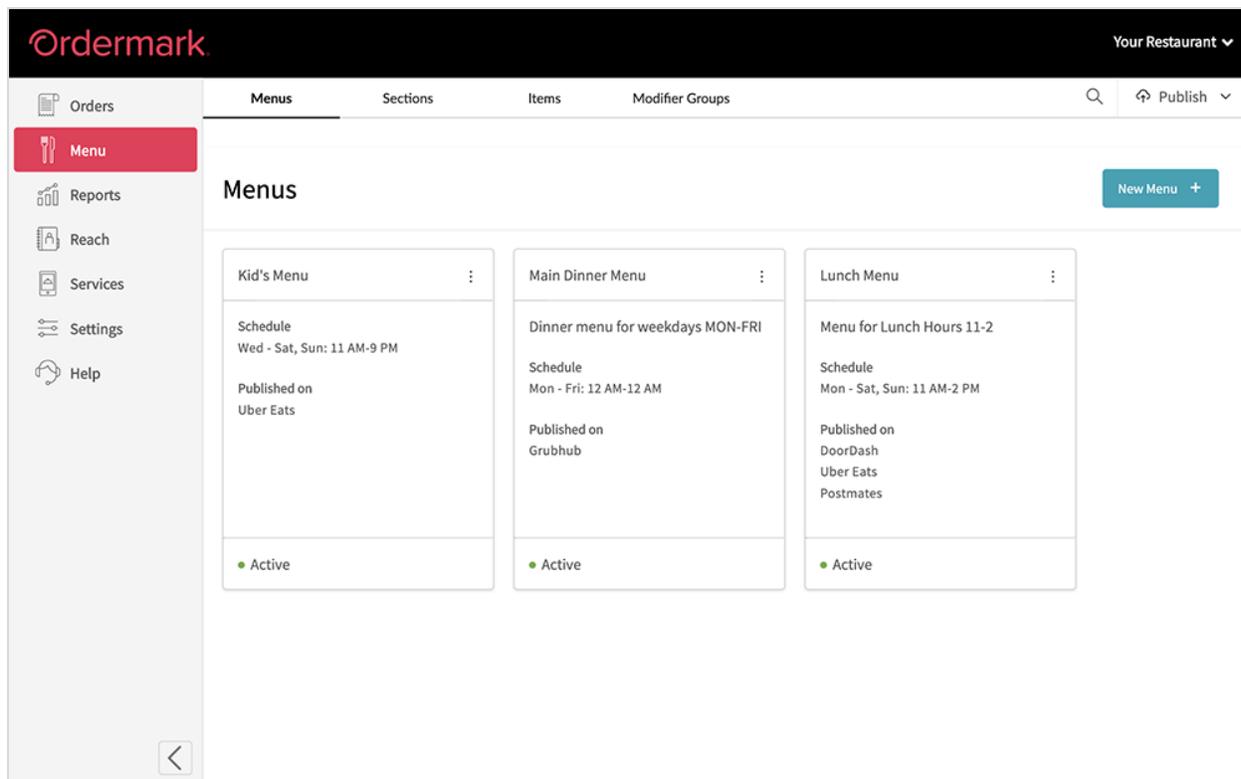
*Note: If a change is not confirmed, it will not be processed.*

From here, the item will be removed from all online ordering platforms until the end of the day.

Should you need to remove a menu item for more than one day, please contact Elite Support, or submit a new 86 ticket after the allotted time has been exhausted.

## Menu - Sync Menu Manager (Admin)

The Sync Menu Manager, gives managers and operators full control over larger menu updates. From here, you can update the price of an item, the order in which the menu is displayed, and add/update modifier groups and sections.



Menu changes made through Sync will not be finalized until your menu is published.

- **Click “Publish” from the top right to save all changes.**  
Menu changes that are not published will not show on each platform
- Please note: Uber Eats changes can NOT be made from the Uber Eats tablet

## Reports (Admin)

The Reports tab is available to Admin logins only. Reports cannot be accessed by User logins, and will not be viewed by your in-house staff.

Reports can be accessed from both your tablet or any online web browser.

The screenshot shows the Ordermark Admin interface. On the left is a sidebar menu with options: Orders, Menu, Reports (highlighted), Reach, Services, Settings, and Help. The main content area is titled 'Report Type' and shows a dropdown menu set to 'Detailed Sales'. A warning message states: 'These reports are informational and should not be used for accounting purposes.' Below this is a table with columns: Provider, Order, Weekdays (7), Provider (12), By Provider, Tip, Delivery, Discount, Adjustment, Other, and Sales. A dropdown menu is open over the table, listing options: Summary, Daily Sales, Detailed Sales (highlighted), Hourly Sales, Sales by Day, Top Sellers, Insight, and Change History.

Provider	Order	Weekdays (7)	Provider (12)	By Provider	Tip	Delivery	Discount	Adjustment	Other	Sales
ChowNow	2	5.12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$174.32
Clorder	5	0.16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$117.01
DoorDash	3	0.62	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$76.27
EatStreet	1	0.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.75
KiwiCampus	4	0.94	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$68.29
OpenDining	1	\$17.50	\$1.66	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19.16
Postmates	2	\$48.20	\$5.01	\$6.00	\$4.49	\$0.00	\$0.00	\$0.00	\$0.00	\$63.70
Ritual	2	\$33.50	\$3.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$36.68
Shopify	3	\$136.20	\$12.93	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$149.13
Uber Eats	5	\$109.65	\$11.27	\$8.00	\$8.98	\$0.00	\$0.00	\$0.00	\$0.00	\$137.90
ChowNow	1	\$79.60	\$7.56	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$87.16
Clorder	2	\$46.70	\$4.44	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$51.14

## Summary Report

The Summary Report is a brief overview of your online ordering business during a specific timeframe.

To change the filters, simply click on the drop-down options in the gray bar.

You can filter by date range, day of week, or specify by provider.

The Summary page will show you:

- Total orders for the date range specified (in gray bar)
- Sales in specific date range
- Average ticket amount
- Average orders per day during filtered date range

The screenshot displays the Ordermark Summary Report interface. On the left is a navigation sidebar with icons for Orders, Menu, Reports (highlighted in red), Reach, Services, Settings, and Help. The main content area features a 'Report Type' dropdown set to 'Summary' and a disclaimer: 'These reports are informational and should not be used for accounting purposes.' Below this is a filter bar with 'Today', a date range '03/04/2020 - 03/04/2020', 'Weekdays (7)', and 'Provider (12)'. The dashboard contains four large metric cards: '51 TOTAL ORDERS', '\$1,554.73 SALES', '\$30.48 AVG. ORDER AMOUNT', and '51 AVG. ORDERS PER DAY'. A back arrow is visible in the bottom left corner of the sidebar.

## Daily Sales

The Daily Sales report can be easily exported or printed directly from the dashboard. Filtering drop-down options are available in the gray bar.

This report can be used to:

- View which day of week has higher online ordering volume
- View difference between delivery and pick-up orders
- Quickly check the health of your online ordering

Ordermark <span style="float: right;">All Locations ▼</span>							
Report Type		Daily Sales ▼					These reports are informational and should not be used for accounting purposes.
Today ▼	03/01/2020 - 03/04/2020		Weekdays (7) ▼	Provider (12) ▼			
Date	Orders	Sales	COD	Prepaid	Pickup	Delivery	
03/01/20 Sun	171	\$5,591.09	\$0.00	\$5,591.09	0	171	
03/02/20 Mon	156	\$5,062.92	\$0.00	\$5,062.92	0	156	
03/03/20 Tue	162	\$5,176.35	\$0.00	\$5,176.35	0	162	
03/04/20 Wed	51	\$1,554.73	\$0.00	\$1,554.73	0	51	
<b>Total</b>	<b>540</b>	<b>\$17,385.09</b>	<b>\$0.00</b>	<b>\$17,385.09</b>	<b>0</b>	<b>540</b>	

## Detailed Sales

The Detailed Sales report will automatically show orders by provider, in the date range that has been selected. This report can be exported or downloaded directly from the dashboard.

Use this report to:

- View which platforms drive more orders
- View which platforms drive higher revenue (orders vs total)
- Monitor adjustments and tips

Ordermark <span style="float: right;">All Locations ▾</span>										
Report Type <span style="float: right;">Detailed Sales ▾</span> <small>These reports are informational and should not be used for accounting purposes.</small>										
Today ▾ <span style="margin-left: 20px;">03/01/2020 - 03/04/2020</span> <span style="margin-left: 20px;">Weekdays (7) ▾</span> <span style="margin-left: 20px;">Provider (12) ▾</span> <span style="margin-left: 20px;">By Provider ▾</span>										
Provider	Orders	Subtotal	Tax	Tip	Delivery	Discount	Adjustment	Other	Sales	
Caviar	12	\$519.00	\$49.32	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$568.32
ChowNow	9	\$716.40	\$68.04	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$784.44
Clorder	37	\$860.20	\$81.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$941.94
Delivery.com	26	\$710.70	\$67.56	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$778.26
DoorDash	34	\$839.00	\$79.77	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$918.77
EatStreet	8	\$261.20	\$24.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$286.00
KiwiCampus	31	\$509.75	\$48.53	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$558.28
OpenDining	11	\$192.50	\$18.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$210.76
Postmates	29	\$940.10	\$94.89	\$78.00	\$58.37	\$0.00	\$0.00	\$0.00	\$0.00	\$1,171.36
Ritual	15	\$251.25	\$23.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$275.10
Shopify	21	\$1,024.10	\$97.23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,121.33
Uber Eats	51	\$1,286.60	\$129.09	\$64.00	\$71.84	\$0.00	\$0.00	\$0.00	\$0.00	\$1,551.53

## Hourly Sales

The Hourly Sales report will show you which provider generates more orders during specific times of day. You can aggregate the providers, and select the filter “By Weekday” or “By Total” to view when orders come into the store more or less frequently.

The report is designed to:

- Help identify hours to increase staff
- Help identify peak hours for kitchen prep
- Further understand you busy online ordering times



## Sales by Day

The Sales by Day report visualizes your orders throughout the time range you've set from the options in the gray bar. You can adjust this chart "By Provider" or aggregated "By Total".

- Easily identify top performing days
- View weekday trends



## Top Sellers

View your top 5, 10, 15 or 20 best selling items and the revenue they generate with the Top Sellers report. To select how many items you wish to view, simply select from the drop-down.

- Better prepare for inventory shortages
- Understand you online ordering customer
- Help staff prepare for day-of food prep



## Insights

The Insight report is available as a download. Once requested, it will be sent to the Admin associated with the account and cannot be accessed by Users.

This Excel report allows you to customize variables and adjust each section, such as Delivery, Tip, Adjustments, and percentages provided to the online ordering partners.

**The below table shows a consolidated order summary for each Online Ordering Service that you have connected to Ordermark**

Add your Online Ordering Service Fee Rates on the HOW TO USE YOUR MTD SUMMARY tab  
Add or change your daily Tip, Delivery Fee, Discount, Donation, Adjustment, Other amounts on each Online Ordering Service tab

Date	Restaurant	Provider	Orders	Subtotal	Tax	Ordering Service Fee	Tip	Delivery Fee	Discount	Donation	Adjustment	Other	Total
09/01/2019	Canter's	Postmates	133	\$3,743.40	\$355.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,099.10
09/02/2019	Canter's	Postmates	177	\$4,940.95	\$469.48	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,410.43
09/03/2019	Canter's	Postmates	125	\$3,310.85	\$314.64	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,625.49
09/04/2019	Canter's	Postmates	95	\$2,341.60	\$222.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,564.10
09/05/2019	Canter's	Postmates	118	\$3,089.35	\$293.56	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,382.91
09/06/2019	Canter's	Postmates	134	\$3,589.25	\$341.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,930.25
09/07/2019	Canter's	Postmates	136	\$3,781.75	\$359.32	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,141.07
09/08/2019	Canter's	Postmates	182	\$5,498.55	\$522.47	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,021.02
09/09/2019	Canter's	Postmates	113	\$3,259.75	\$309.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,569.55
09/10/2019	Canter's	Postmates	144	\$3,790.90	\$360.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,151.10
09/11/2019	Canter's	Postmates	130	\$3,162.70	\$300.51	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,463.21
09/12/2019	Canter's	Postmates	135	\$3,364.75	\$319.69	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,684.44
09/13/2019	Canter's	Postmates	147	\$3,832.05	\$364.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,196.19
09/14/2019	Canter's	Postmates	155	\$4,323.30	\$410.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,734.13
09/15/2019	Canter's	Postmates	211	\$5,431.05	\$516.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,947.10
09/16/2019	Canter's	Postmates	114	\$3,176.90	\$301.86	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,478.76
09/17/2019	Canter's	Postmates	127	\$3,422.00	\$325.21	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,747.21

Each section highlighted in blue is an area you can edit.

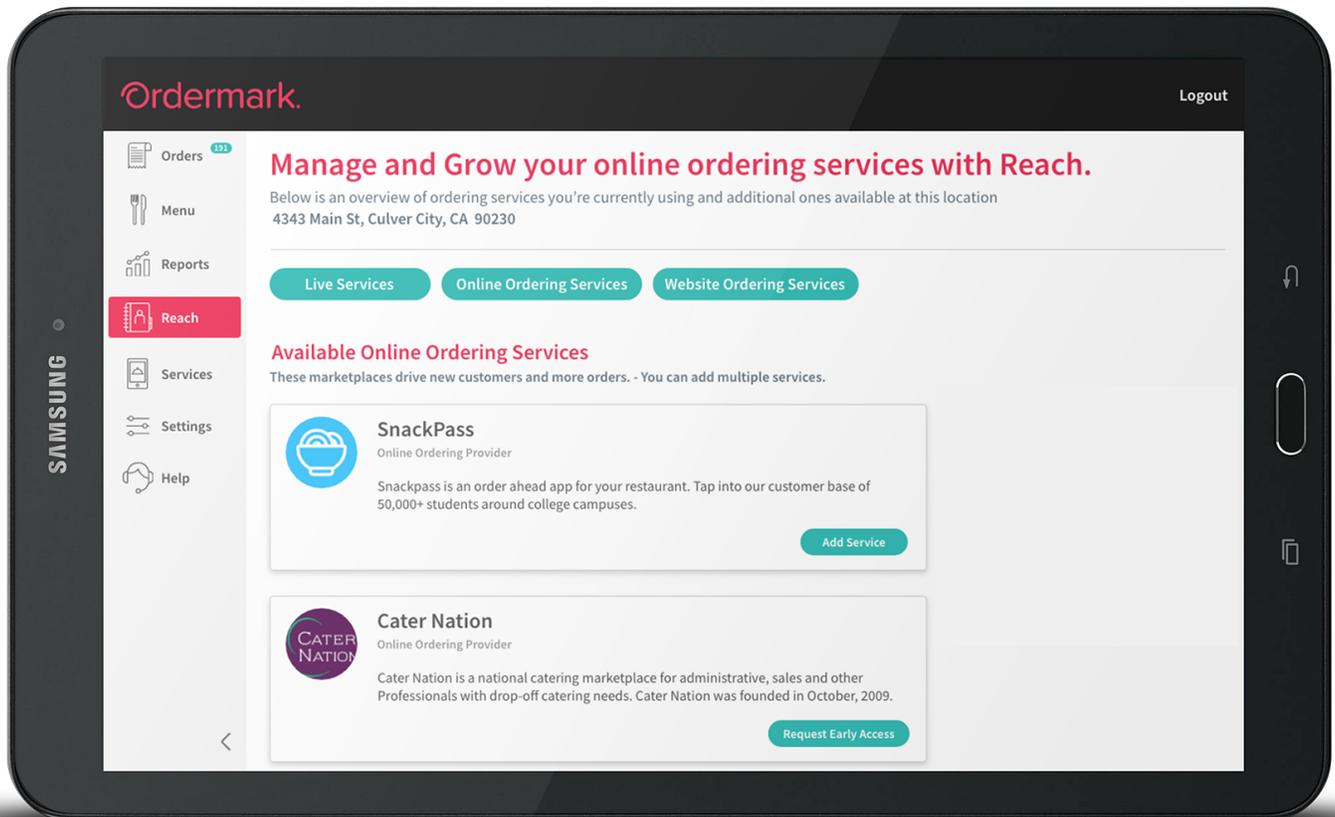
## Change History

Use the Change History tab to monitor changes made to your online ordering throughout the day, like Item 86ing and temporary pauses.

This will help identify items that need to be ordered more frequently or when staff needs more support to fulfill orders.

## Reach

Reach shows which online ordering platforms are available to your location, updated in real time by ZIP code. To add an additional service, please contact Elite Support.



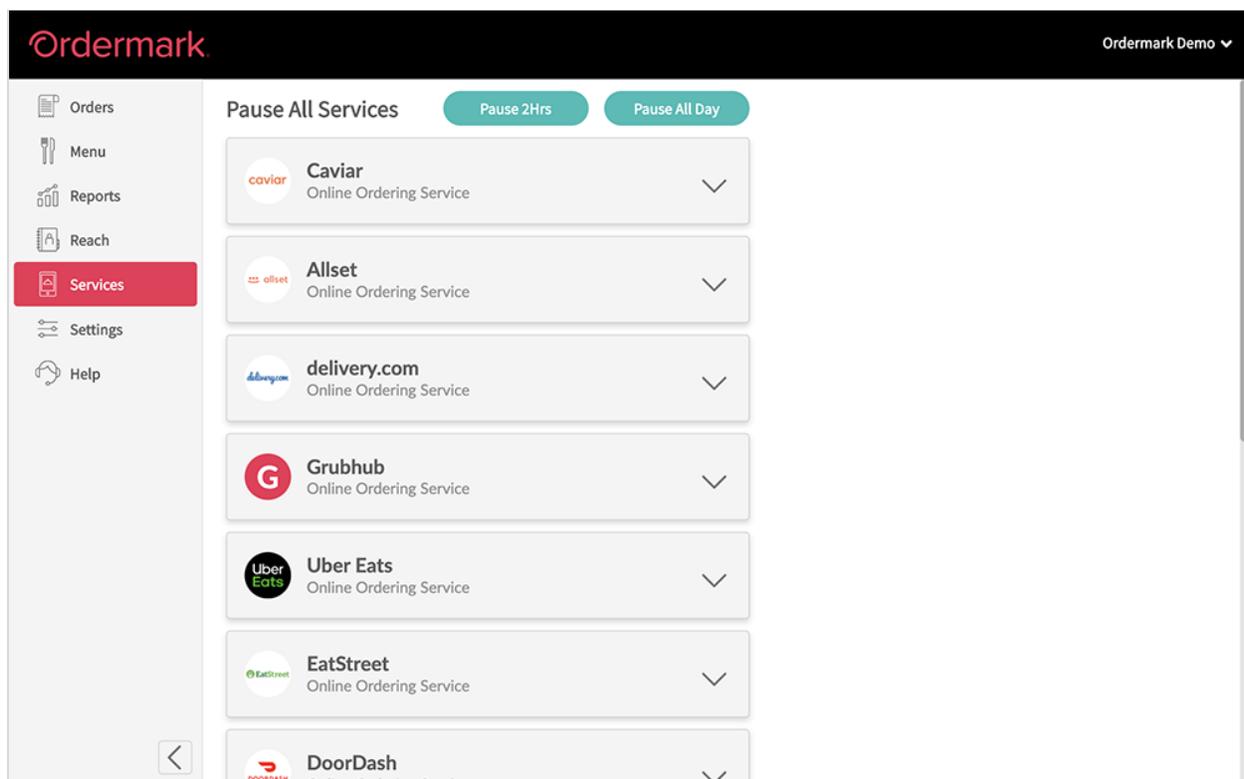
## Services

Should you need to update the login credentials to your online ordering platforms, you can.

- Using your Ordermark dashboard, via the “Services” tab. Select the service you are looking to connect, and provide valid login credentials from your Ordermark tablet or any web browser.
- You can also always email your [Ordermark Elite Support](#) with the required Third-party login information.

## Pausing

You can temporarily pause all orders (2 hours) or Pause All Day in the event of an emergency, or in preparation for a busy time in-store.



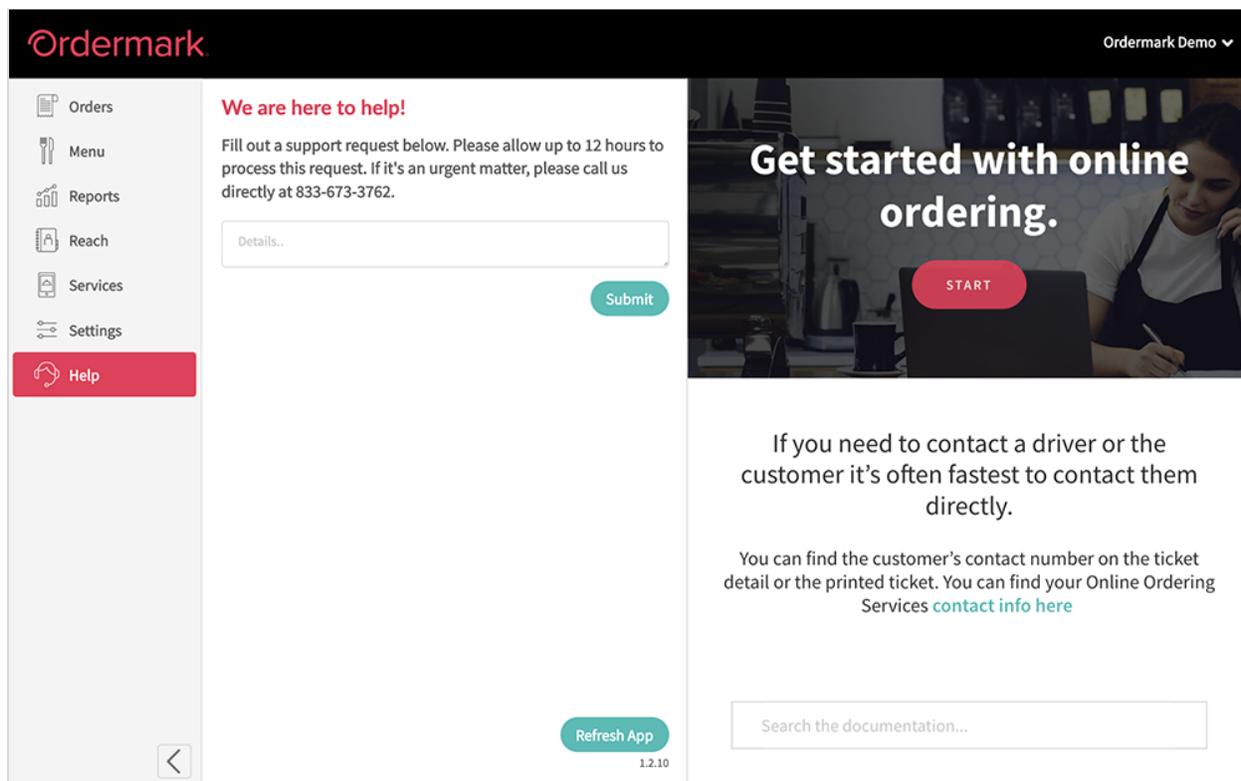
## Help

Ordermark offers 24/7 customer support for any issue you may face. For self-help articles and guides, visit the Help tab directly in the dashboard.

You can always contact Support for further questions:

Phone 833-673-3762

Email [support@ordermark.com](mailto:support@ordermark.com)



The screenshot shows the Ordermark dashboard interface. On the left is a navigation sidebar with icons for Orders, Menu, Reports, Reach, Services, Settings, and Help (which is highlighted in red). The main content area is split into two columns. The left column contains a support request form with the heading "We are here to help!", instructions to fill out a request, a text input field labeled "Details..", a "Submit" button, and a "Refresh App" button with the version number "1.2.10". The right column features a banner for "Get started with online ordering." with a "START" button, followed by text advising users to contact drivers or customers directly and providing a link for "contact info here". At the bottom of the right column is a search bar labeled "Search the documentation...".

# Support

## Using the Tablet for Submitting Issues:

- 86ing
- Driver/Order issues
- Upcharging
- Temporarily Pausing Service (approval required)

### 86ing

Staff can make quick, on-the-fly changes directly from the dashboard. In the event that staff needs to 86 a menu item, they can do so from the Menu tab.

Once an item has been 86'd from the tablet, it will be updated across all online ordering platforms automatically.

### Driver/Order Issues

Should staff members need support for driver or order issues, help tickets can be submitted through the dashboard.

If a driver does not show, or an order is packaged incorrectly, simply view the ticket details of the order from the Orders Homepage.

From here, staff can type out the issue and submit it to our team to resolve.

### Upcharging

To upcharge a menu item that has already been fulfilled, please view the ticket "Details" from the Orders Homepage and submit a request to our team.

### Pausing Service

Pausing services can be completed from the tablet (from the Services tab) or by contact Support via phone at 833-673-3762.