



# Quick Reference Guide for Menu Building – Restaurants

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# Introduction

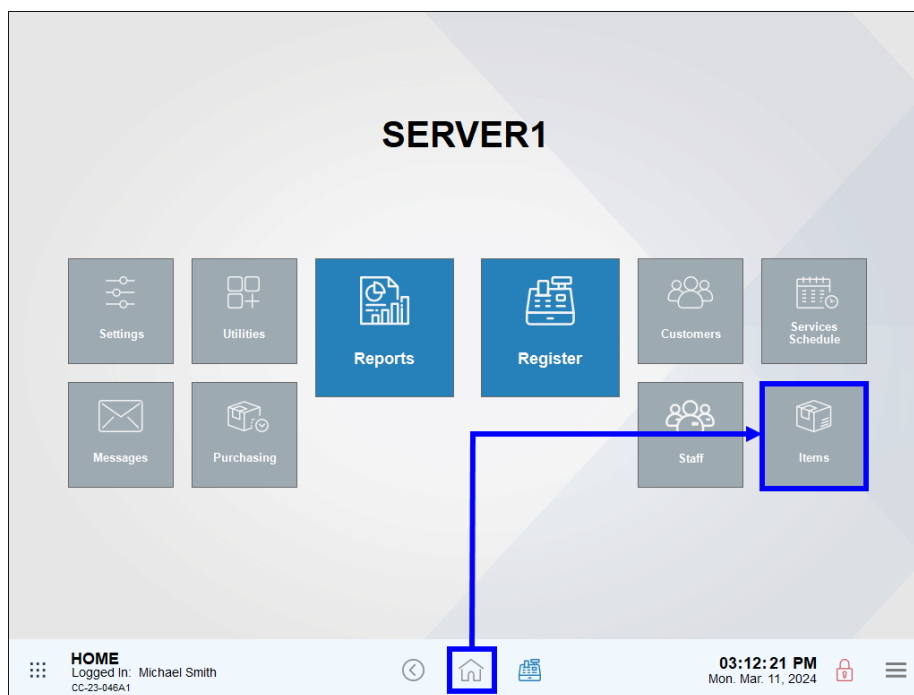
The Exatouch Point of Sale (POS) system allows users to quickly build menus to maximize efficiency when processing sales.

This document contains the procedures required to build a menu in Exatouch. It is intended to be a Quick Reference Guide, and does not incorporate all capabilities and features available in the Exatouch POS system. Hyperlinked topics within this document will take you to the Exatouch Knowledge Base for more information.

## Getting Started

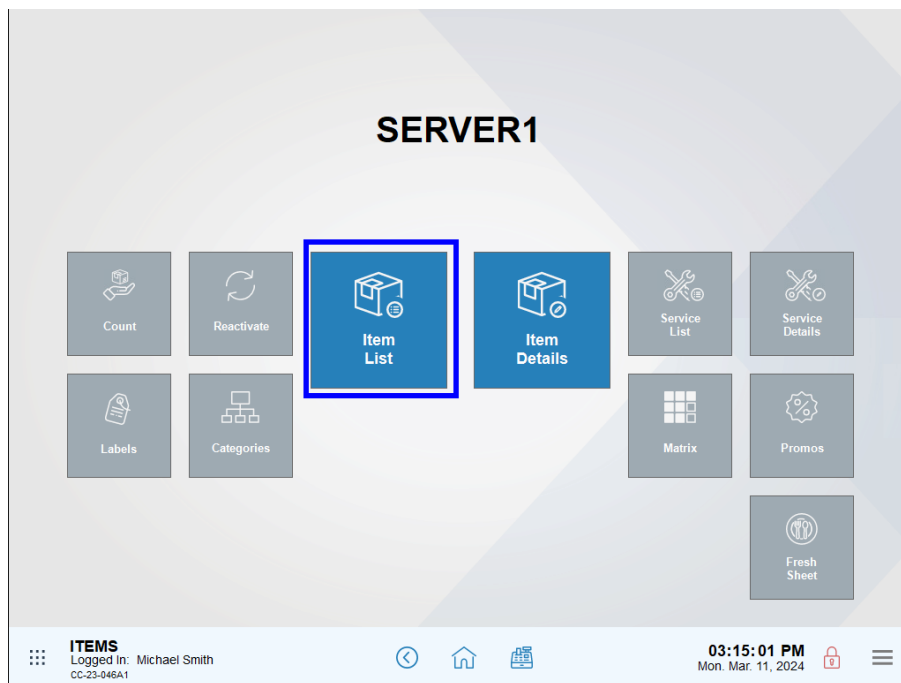
### Items Module

Menu building takes place within the **Items** module, which is located on the **Home** screen. Navigate to the Home screen by tapping the **Home** button at the bottom of most Exatouch screens.



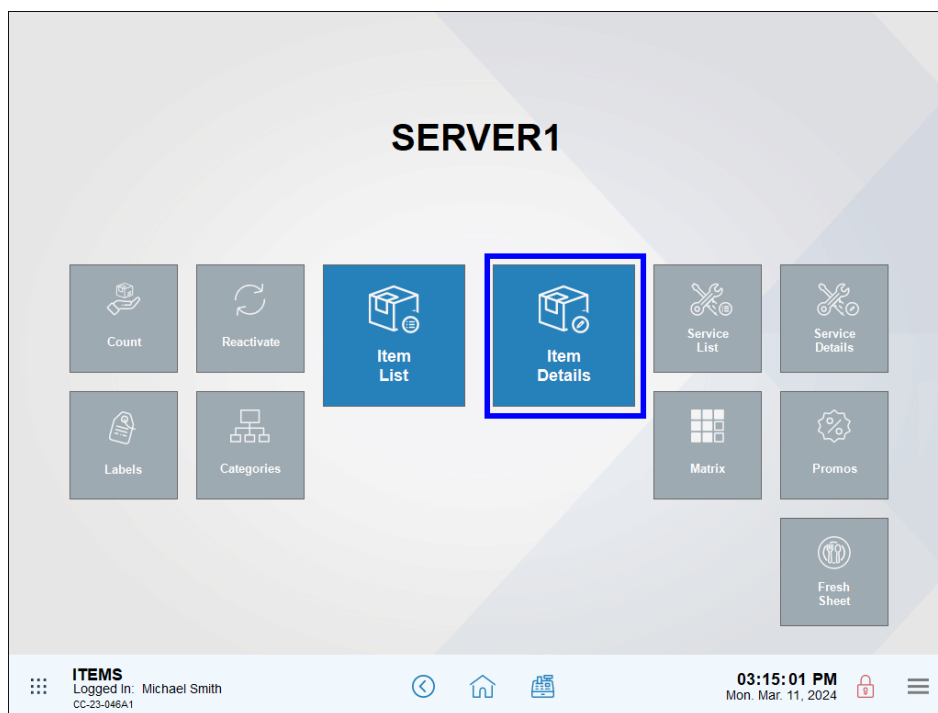
### Item List Module

Tapping the **Item List** module displays all items and modifiers added into the Exatouch POS. From **Home**, navigate to **Items > Item List**.



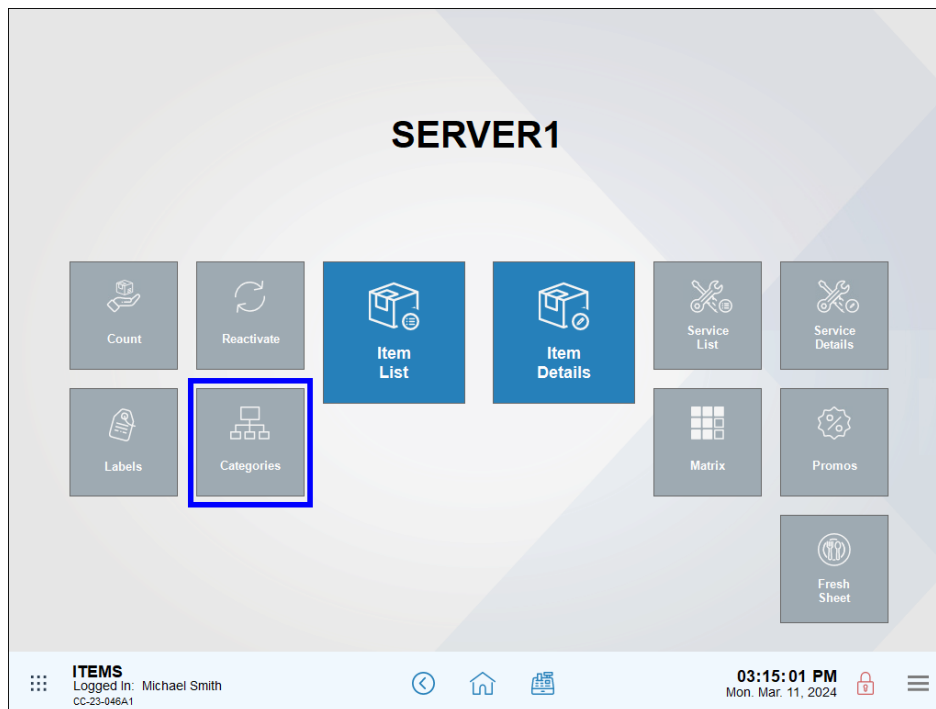
## Item Details Module

Tapping the **Item Details** module displays the Item Details page, where users can create items, add categories and subcategories, assign modifiers, and perform other item functions. From **Home**, navigate to **Items > Item Details**.



## Categories Module

Tapping the **Categories** module displays Categories work area, where users can create categories and subcategories. From **Home**, navigate to **Items > Categories**.



## Create Categories and Subcategories

Begin building a menu by first organizing items and services into categories and subcategories. Categories and subcategories help merchants find items more easily in the Register app.

### Create a Category

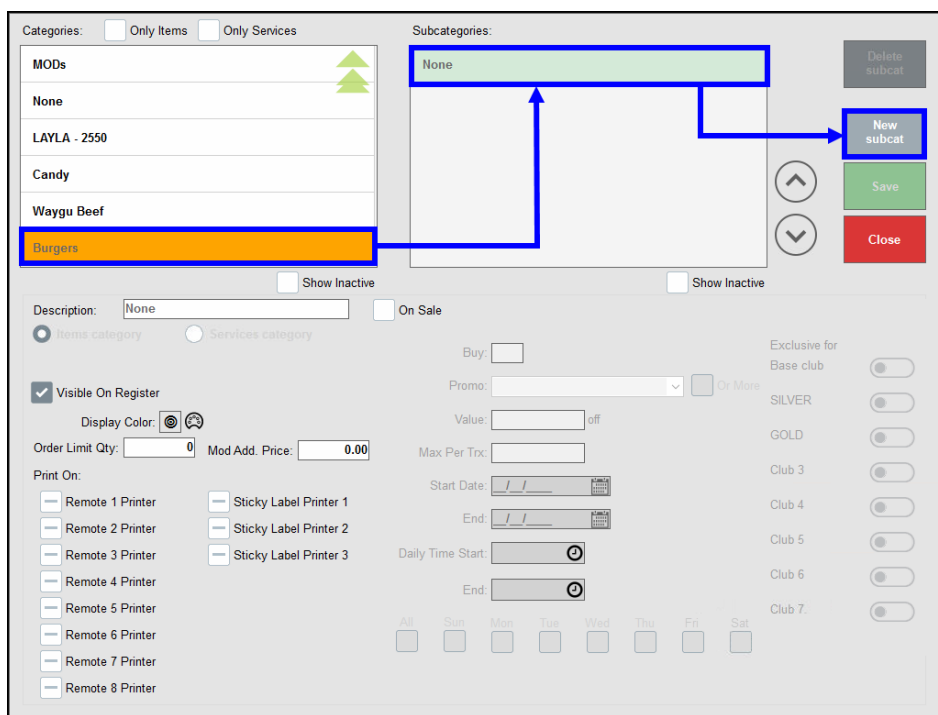
1. From **Home**, navigate to **Items > Categories**.
2. Tap **New Category** to start a new category.

3. Enter a **Description**, and then select a category type: **Items category** or **Services category**.
4. Select the **Visible On Register** checkbox.

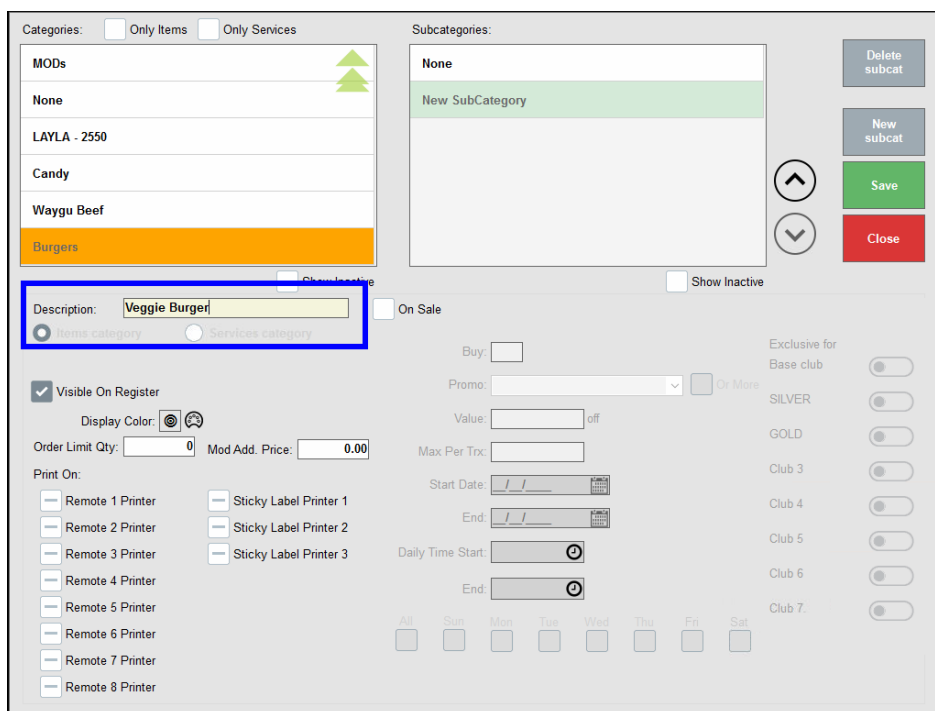
5. Tap **Save**.
6. Repeat as needed to create additional categories.

## Create a Subcategory

1. From **Home**, navigate to **Items > Categories**.
2. Select a category, tap **None** in the Subcategories work area, and then tap **New subcat** to start a new subcategory.



3. Enter a **Description** name.



4. Tap **Save** to save the subcategory.
5. Repeat as needed to create additional subcategories.

**NOTE:** Saving a subcategory returns users to the Items screen. Tap the **Categories** module to continue adding subcategories.

## Creating Root Items

After creating categories and subcategories, add root items to associate with categories and subcategories.

### Add an Item

1. From **Home**, navigate to **Items > Item Details**.
2. Tap the **Details** tab.
3. Enter a SKU number in the **SKU** field or tap the **SKU icon** to auto-generate a SKU. In Exatouch, random SKU numbers are assigned to newly created items for identification purposes.



4. In the **Item Name** field, enter a name for the item. The item name populates in several fields below.

5. Enter a price in the **Price** field.

The screenshot shows the 'Item Details' form for 'EPI Burger'. At the top, the 'Price' field is highlighted with a blue box and contains the value '12.00'. Below the form, a navigation bar includes buttons for 'Delete', 'Inventory Movement', 'Duplicate', 'All Items', 'First Item', 'Prev Item', 'Next Item', 'Last Item', 'Save', 'Save & Add New', and 'New'. The footer displays 'ITEM DETAILS', 'Logged In: EPI Agent', and the time '09:08:39 AM Thu. Aug. 11, 2022'.

6. Select a **Category** and **Subcategory** (if applicable) for the item.

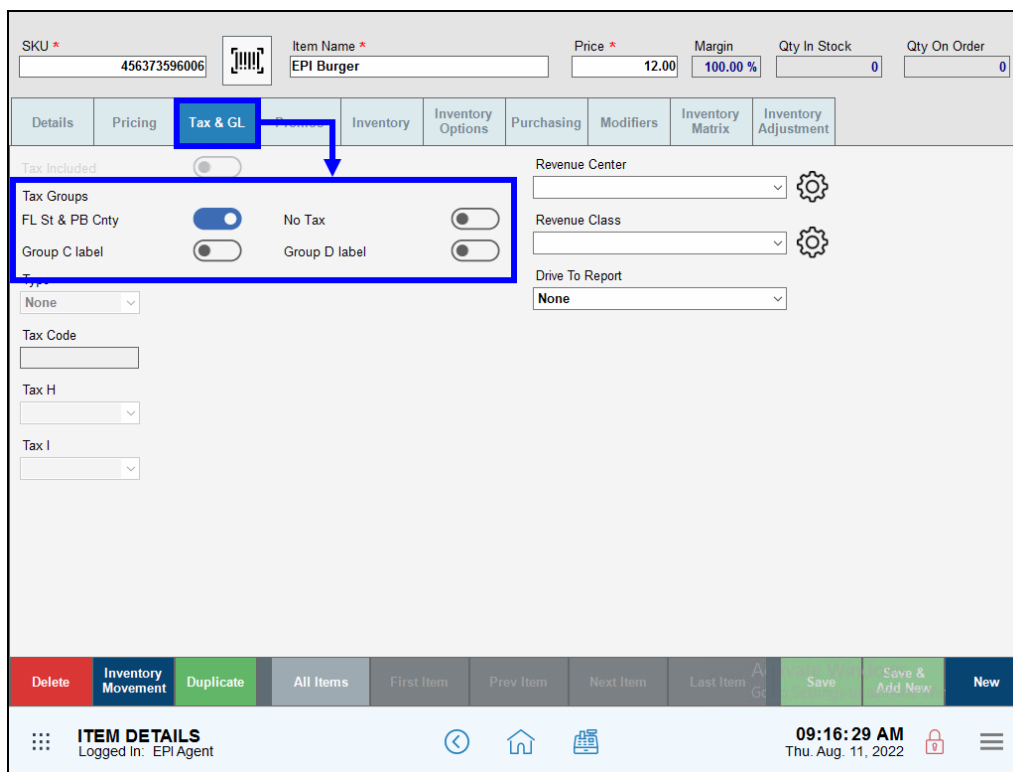
This screenshot is identical to the one above, but with a blue box highlighting the 'Category' and 'Subcategory' dropdown menus. The 'Category' dropdown is set to 'Burgers' and the 'Subcategory' dropdown is set to 'None'.

7. Tap **Save**.

## Set Tax Rates for Individual Items

Merchants should also verify that proper tax rates are enabled.

1. On the Item Details screen, tap the **Tax & GL** tab.
2. In the **Tax Groups** section, adjust the sliders to enable or disable desired tax settings.



3. Tap **Save**.

**TIP:** For detailed tax group configuration, see the [Set General Tax Rates](#) section of the Online Knowledge Base.

## Creating Modifiers

A modifier is an item which further describes or amends a customer's order. Modifier creation follows the same process as creating a root item.

### Add a Modifier

1. From **Home**, navigate to **Items > Item Details**.

2. Tap **New**, then create a SKU number.
3. Enter a modifier name in the **Item Name** field.
4. Select the **Category** and **Subcategory** from the dropdowns.

SKU \* 428532432364 Item Name \* American Cheese Price \* 0.00 Margin 0.00 Qty In Stock 0.00 Qty On Order 0.00

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing Modifiers Inventory Matrix Inventory Adjustment

Description

Button Label \* American Cheese American Cheese

Receipt Description \* American Cheese

Remote Print Description \* American Cheese

Sticky Label Print Description American Cheese

Category \* MODS Subcategory \* Cheese

Modifier 86 Item EBT Eligible

E-WIC Eligible Show On Register Refundable Age Check No

Stock Locations

Discontinued

Available Online

Delete Inventory Movement Duplicate All Items First Item Prev Item Next Item Last Item Save & Add New New

NEW ITEM Logged In: EPI Admin 02:10:03 PM Wed, Aug. 10, 2022

5. Enter a price in the **Price** field. If there is no charge, enter **0.00**.
6. Toggle the **Modifier** slider to enable the modifier.

The screenshot shows the 'Item Details' screen for 'American Cheese'. The top bar contains fields for SKU (455998626419), Item Name (American Cheese), Price (0.00), Margin (0.00), Qty In Stock (0), and Qty On Order (0.00). Below this is a navigation bar with tabs: Details, Pricing, Tax & GL, Promos, Inventory, Inventory Options, Purchasing, Modifiers, Inventory Matrix, and Inventory Adjustment. The 'Details' tab is active. The main content area includes several text input fields for Description, Button Label (American Cheese), Receipt Description (American Cheese), Remote Print Description (American Cheese), and Sticky Label Print Description (American Cheese). There are also dropdown menus for Category (MODs) and Subcategory (Cheese). A 'Modifier' toggle switch is highlighted with a blue box. On the right side, there are toggle switches for E-WIC Eligible, Show On Register, Refundable, Discontinued, and Available Online, along with a dropdown for Age Check (No) and a 'Stock Locations' table with three rows and 'Delete' buttons. At the bottom, there is a navigation bar with buttons: Delete, Inventory Movement, Duplicate, All Items, First Item, Prev Item, Next Item, Last Item, Save With Settings, Save & Add New, and New. The bottom status bar shows 'NEW ITEM', 'Logged in: EPI Agent', navigation icons, the time '09:28:12 AM', the date 'Thu. Aug. 11, 2022', and a lock icon.

7. Tap **Save**.

## Add Price to a Modifier

Merchants can also assign a price to modifiers, such as adding a charge for extra cheese or bacon to a hamburger.

1. From **Home**, navigate to **Items > Items Details**.
2. Create a modifier.
3. Enter a **Price** for the modifier.

SKU \* 416874888901 Item Name \* Bacon Price \* 01.00 Margin 0.00 Qty In Stock 0 Qty On Order 0.00

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing Modifiers Inventory Matrix Inventory Adjustment

Description

Button Label \* Bacon

Receipt Description \* Bacon

Remote Print Description \* Bacon

Sticky Label Print Description Bacon

Category \* Subcategory \*

Modifier

EBT Eligible

E-WIC Eligible Show On Register Refundable Age Check No

Stock Locations

Discontinued

Altria Scan Data

Loyalty Fund Program

Available Online

Delete Inventory Movement Duplicate All Items First Item Prev Item Next Item Last Item Save & Add New Save & Add New New

NEW ITEM Logged In: EPI Agent 09:43:19 AM Thu. Aug. 11, 2022

4. Select the **Category** and **Subcategory**.

SKU \* 416874888901 Item Name \* Bacon Price \* 1.00 Margin 100.00 % Qty In Stock 0 Qty On Order 0.00

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing Modifiers Inventory Matrix Inventory Adjustment

Description

Button Label \* Bacon

Receipt Description \* Bacon

Remote Print Description \* Bacon

Sticky Label Print Description Bacon

Category \* MODs Subcategory \* Toppings

Modifier

EBT Eligible

E-WIC Eligible Show On Register Refundable Age Check No

Stock Locations

Discontinued

Altria Scan Data

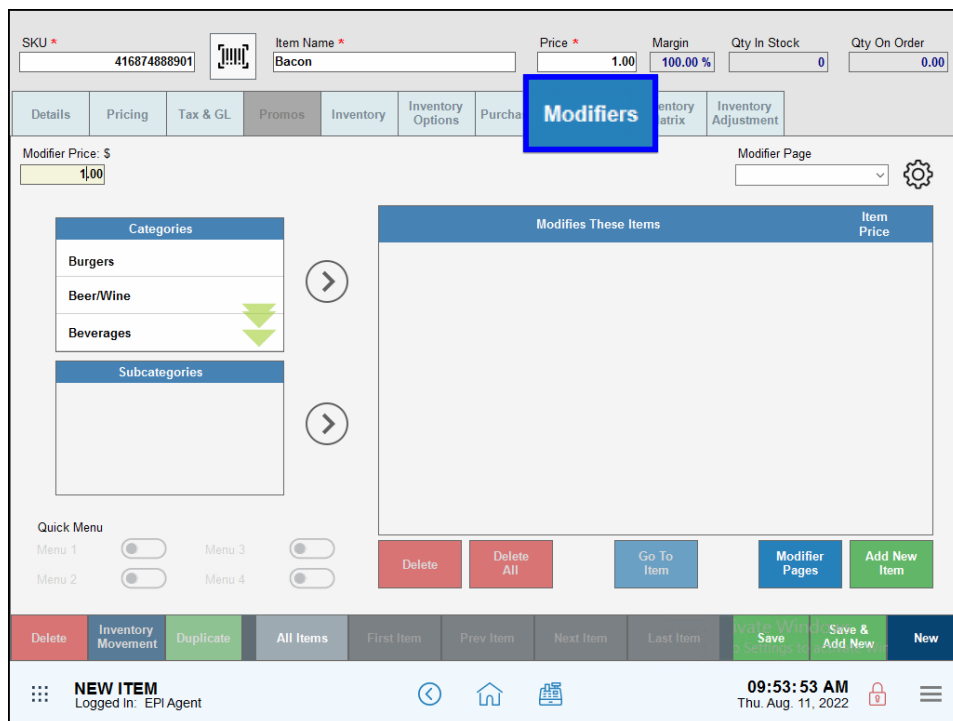
Loyalty Fund Program

Available Online

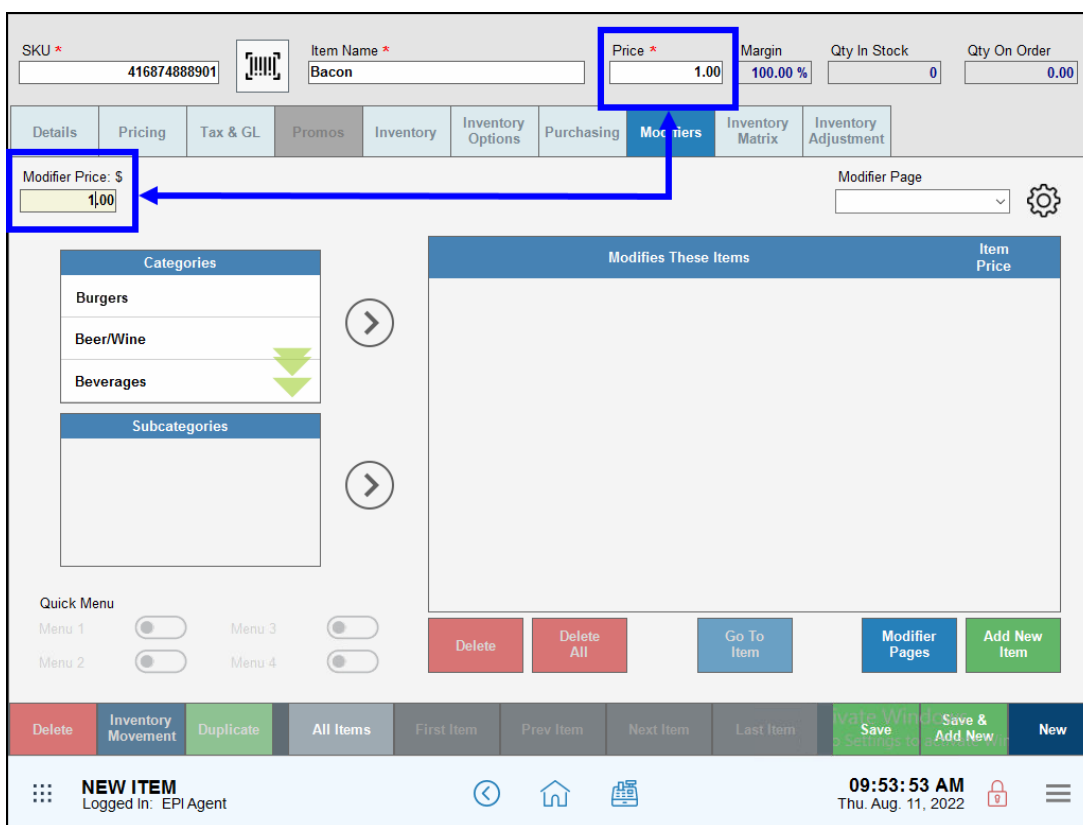
Delete Inventory Movement Duplicate All Items First Item Prev Item Next Item Last Item Save & Add New Save & Add New New

NEW ITEM Logged In: EPI Agent 09:50:06 AM Thu. Aug. 11, 2022

5. Tap the **Modifiers** tab.



6. Enter the item price in the **Price** and **Modifier Price: \$** fields.



7. Tap **Save**.

**NOTE: Modifier Price** is the amount charged to the customer in the **Register** app. The **Price** field represents the dollar value that displays in the **Price \$** column of the Items List page. This helps merchants to differentiate items in inventory.

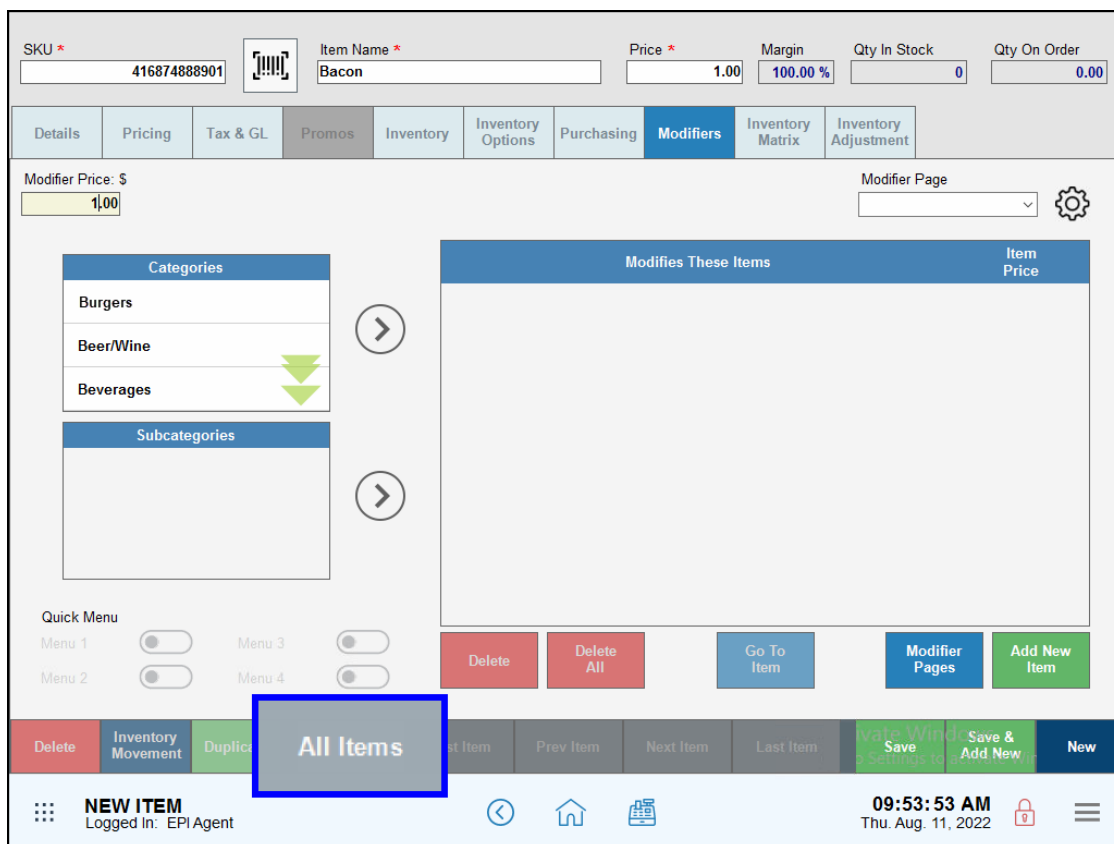
## Attaching Modifiers

Merchants can attach modifiers either individually to an item or in groups via subcategories.

### Attaching an Individual Modifier

Attach modifiers to root items selected from the Items List page. This method is more suited to smaller, less complex menus.

1. From the Item Details page, tap **All Items**. The Items List page displays.



**NOTE:** You can also access the Items List from the **Home** screen, and then navigating to **Items > Items List**.

2. Select a root item from the Items List page. The Item Details page displays.



Item	SKU	Category	Manufacturer	Size	Price \$	Qty.
<b>EPI Burger</b>	<b>421482651526</b>	<b>Burgers</b>				<b>10.00 0.00</b>
American Cheese	416693674273	MODS			0.00	0.00
Bacon	488035758811	MODS			1.00	0.00
Med Rare	415750943338	MODS			0.00	0.00
Onion	410615956249	MODS			0.00	0.00
Rare	414891930474	MODS			0.00	0.00
Swiss Cheese	495169682844	MODS			0.00	0.00

Search:  Advanced Item Search Clear Search Results Modify All List Items Print List Report

**ITEMS LIST**  
Logged In: System Admin 03:52:19 PM  
Wed, Aug 03, 2022

3. Tap the **Modifiers** tab.

4. Tap **Add New Modifier**.

SKU \* 456373596006 Item Name \* EPI Burger Price \* 12.00 Margin 100.00 % Qty In Stock 0 Qty On Order 0

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing **Modifiers** Inventory Matrix Inventory Adjustment

Modifier Limit  Modifier Price Rollup  Use Item Price  Allow Discount  Default Modifier Page

Categories: Burgers, Beer/Wine, Beverages

Subcategories:

Quick Menu: Menu 1  Menu 2  Menu 3  Menu 4

**Add New Modifier**

Delete Delete All Go To Modifier Manage Group

**ITEM DETAILS**  
Logged In: EPI Agent 10:28:47 AM  
Thu, Aug 11, 2022

5. Select a modifier to attach.

**TIP:** Use the **Search** field to narrow the list of available modifiers.

Item	SKU	Size	Color	Style	Price	Current Qty	Last PO Date	Last PO Qty
Bar S Bacon	015900060009				7.01	96		
Colonial Bacon	072330024001	1 lb			7.88	-2		
Oscar Mayer Bacon	044700019764	8 oz			5.80	8		
Bacon	416874888901				1.00	0		
Bacon	430524576550				0.00	-13		

Search:  Category: All

Subcategory:

Close Insert All Add New Item

6. Tap **Close**. The modifier displays as attached to the root item.

SKU \*  Item Name \*  Price \*  Margin  Qty In Stock  Qty On Order

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing **Modifiers** Inventory Matrix Inventory Adjustment

Modifier Limit  Modifier Price Rollup  Use Item Price  Allow Discount  Default Modifier Page

**Categories**

- Burgers
- Beer/Wine
- Beverages

**Subcategories**

This Item's Modifiers	Upcharge	Required	Default
Bacon	1.00	No	<input checked="" type="checkbox"/>

Quick Menu: Menu 1  Menu 2  Menu 3  Menu 4

Delete Delete All Go To Modifier Manage Group Add New Modifier

Delete Inventory Movement Duplicate All Items First Item Prev Item Next Item Last Item Save Save & Add New New

ITEM DETAILS Logged In: EPIAgent 10:38:31 AM Thu. Aug. 11, 2022

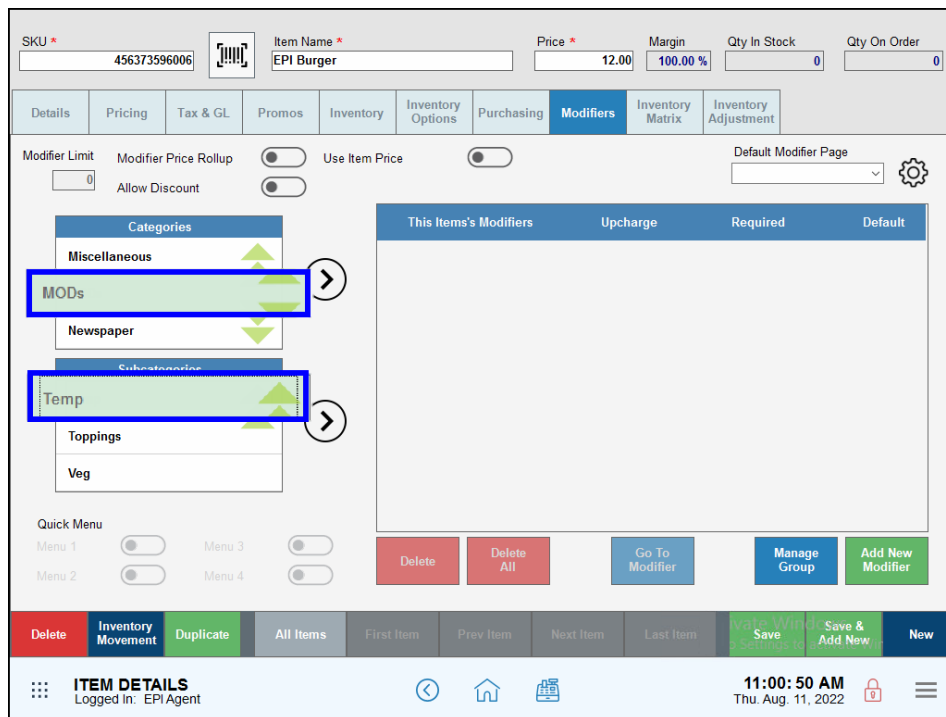
7. Tap **Save**.

8. Repeat as necessary to attach more modifiers.

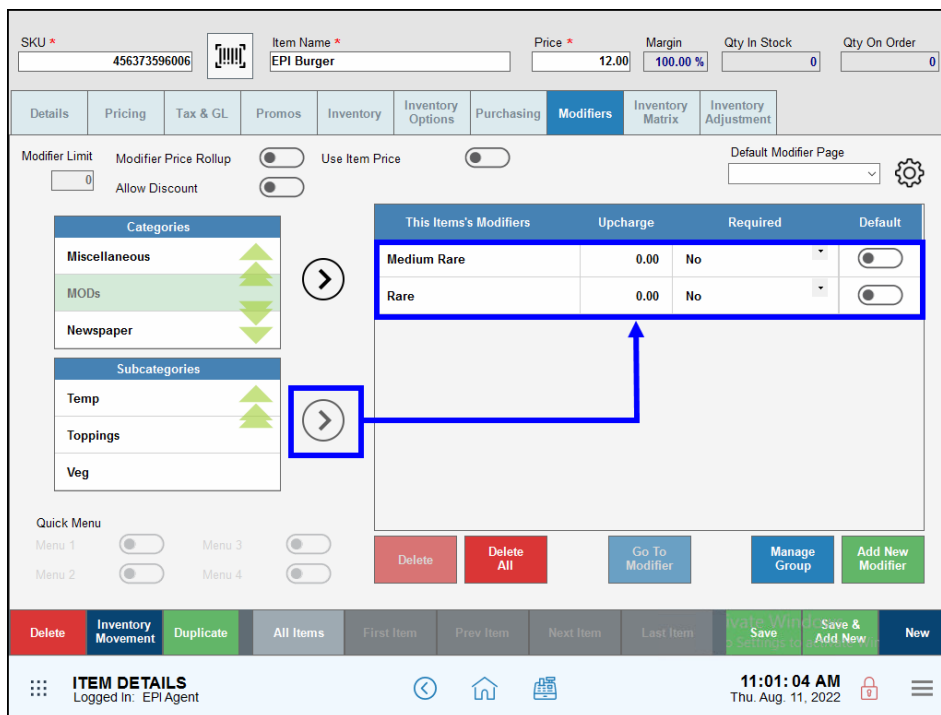
# Attach Modifiers by Subcategory

Attaching modifiers by subcategories allows users to build larger menus more quickly and efficiently than attaching a single modifier to a single item.

1. On the Item Details page, tap **Modifiers**.
2. Select a category from the **Categories** work area.
3. Select a subcategory from the **Subcategories** work area.



4. Tap the **Subcategory** arrow. Modifiers associated with the subcategory attach to the item.

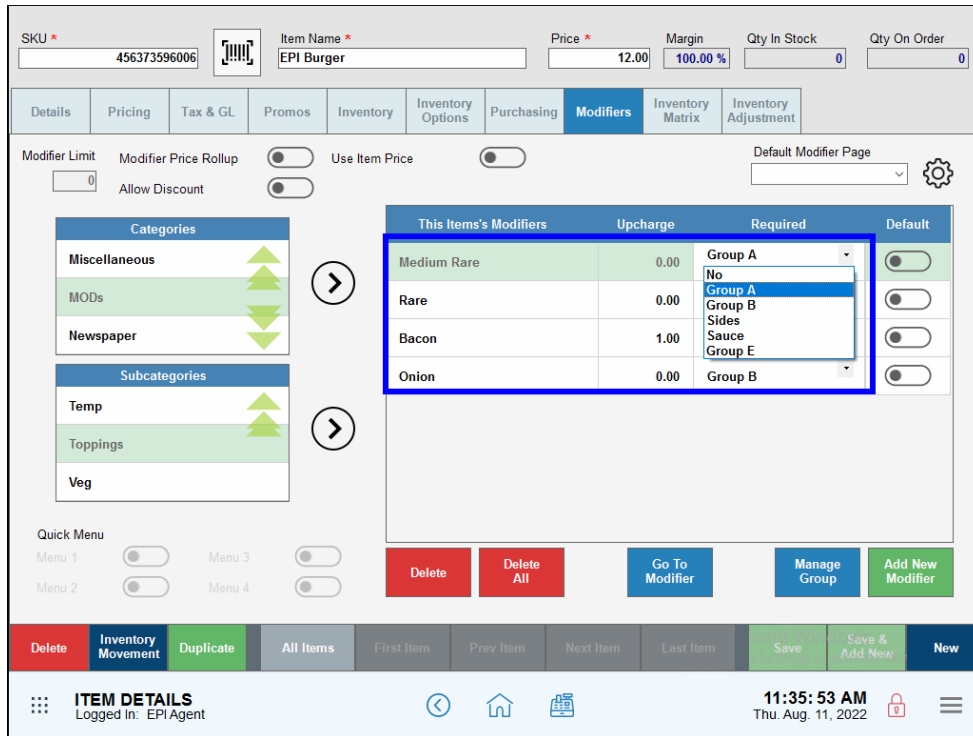


5. Tap **Save**.
6. Repeat as necessary to add more modifiers.

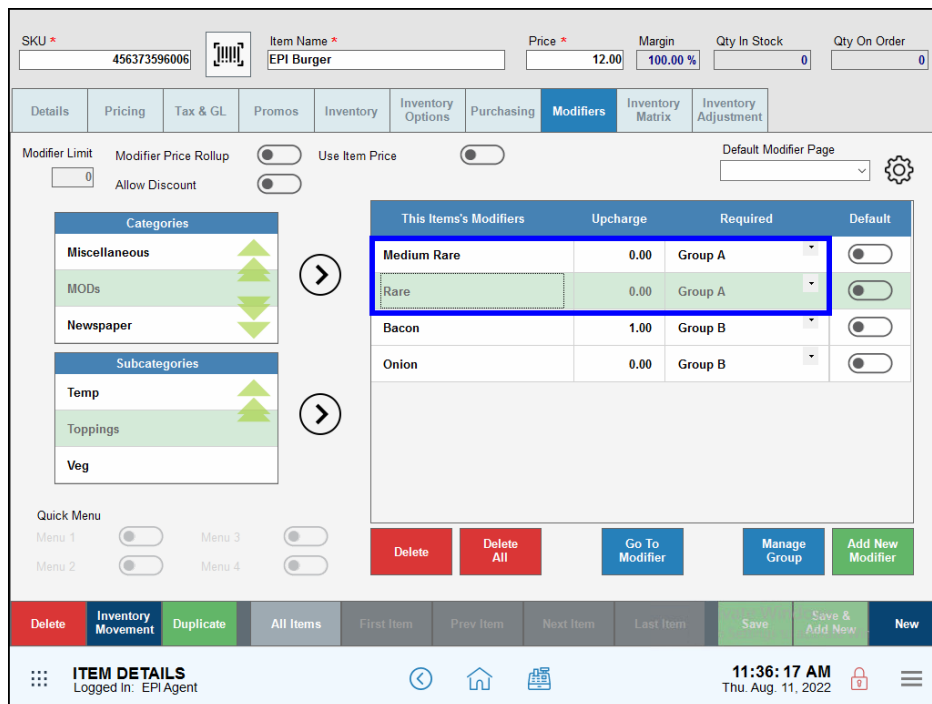
## Grouping Modifiers

Merchants can further organize modifiers in the by assigning them to groups. Once assigned to a group, modifiers become required modifiers in the **Register** app.

1. Select an item.
2. Tap **Modifiers**.
3. In the **Required** column of the modifier work area, select a group name from the dropdown to assign to a modifier.



- Assign the same group name to other modifiers in the same subcategory. For example, select **Group A** for all Temp modifiers.



- Tap **Save**.

## Managing Modifier Groups

By default, users can select one modifier per modifier group. The **Manage Group** function allows users to select multiple modifiers for the same group. This gives users more flexibility when ringing up an item.

1. From the Item Details page, tap **Manage Group**. A pop-up displays.
2. In the **Description** column, rename group names (if desired).
3. In the **Minimum** column, enter the minimum number of modifiers to apply. Enter “0” to account for plain orders.
4. In the **Maximum** column, enter the maximum number of modifiers to apply. For example, to allow up to five modifiers, enter “5.”

Description	Minimum	Maximum
Group A	1	1
Group B	0	5
Sides	1	1
Sauce	1	1
Group E	1	1

Close OK

5. Tap **OK** to return to the Item Details page.
6. Tap **Save**.
7. Verify **Manage Group** settings in the Register.

Scan the QR Code to see Exatouch Quick Reference and User Guides:



Any questions? We’re here to help! Contact our 24/7 Technical Support Team at (800) 966-5520 – Option 3 or email us at [support@electronicpayments.com](mailto:support@electronicpayments.com).