



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 it does not incorporate all capabilities and features available in the Exatouch POS system.

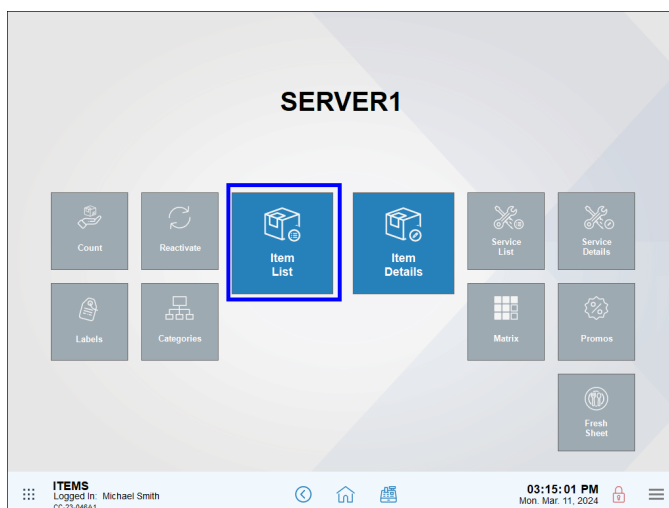
Getting Started

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.

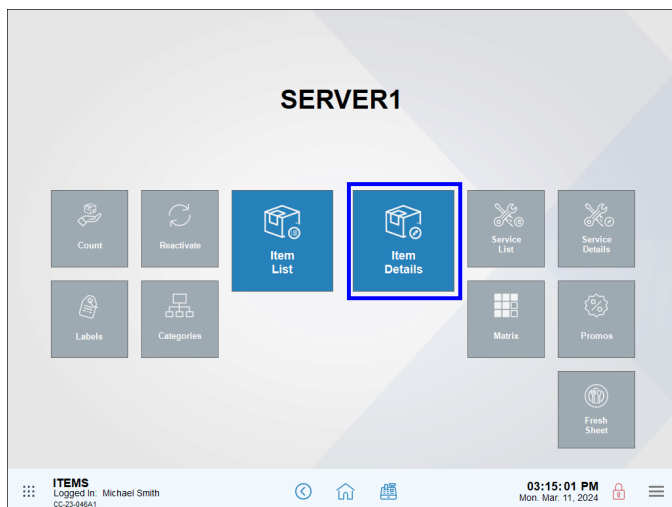
Item List Module

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



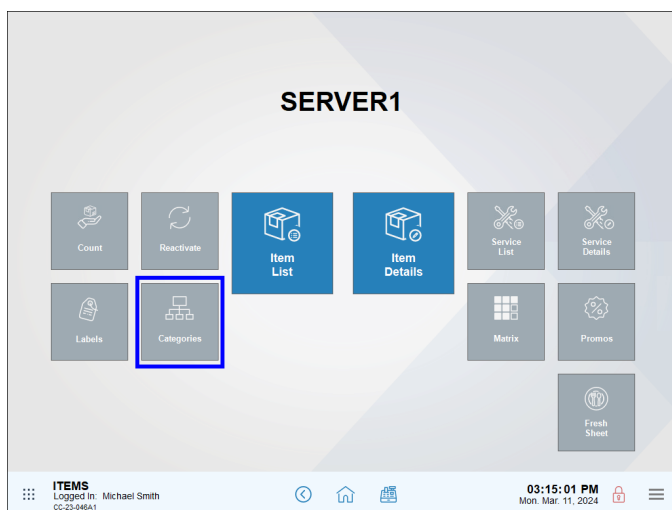
Item Details Module

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



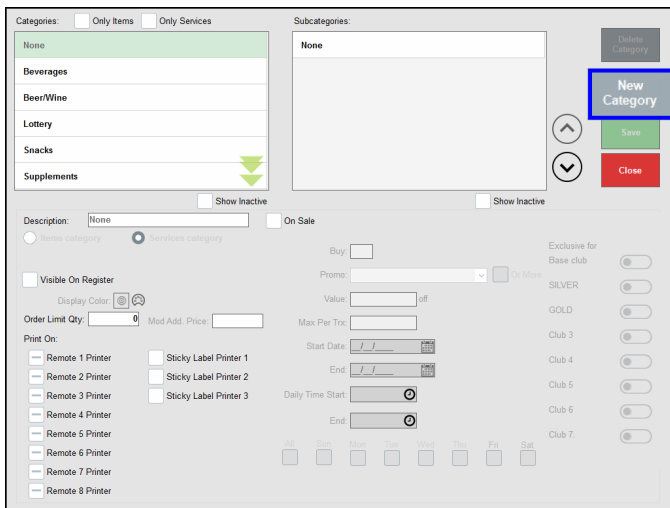
Creating Categories and Subcategories

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**.

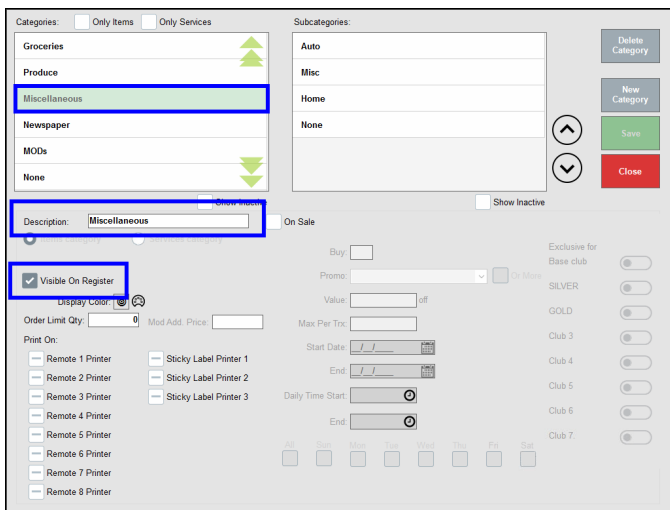
Create a Category

1. From **Home**, navigate to **Items > Categories**.

2. Tap **New Category** to start a new category.



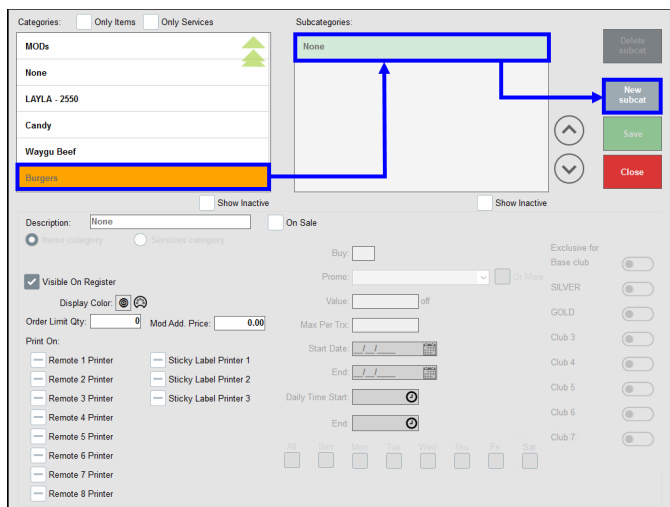
3. Enter a **Description**, and then select a category type: **Items category** or **Services category**.
4. Select the **Visible on Register** checkbox.



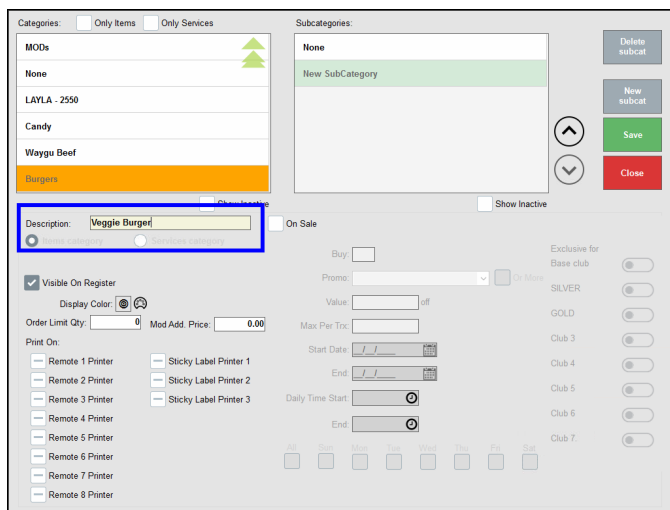
5. Tap **Save**.
6. Repeat as needed to create additional categories.

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.

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

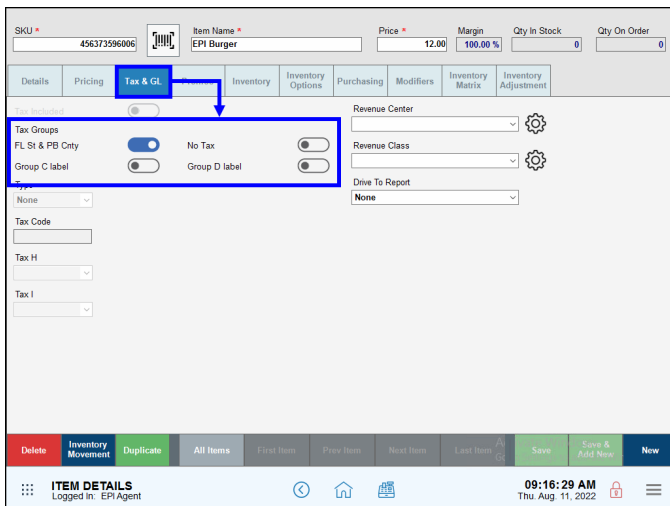
7. Tap **Save**.

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.

- In the **Tax Groups** section, adjust the sliders to enable or disable desired tax settings.



- Tap **Save**.

TIP: For detailed tax group configuration, see the [Set General Tax Rates](#) section of the Exatouch 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 root item creation.

Add a Modifier

- From **Home**, navigate to **Items > Item Details**.
- Tap **New**, then create a **SKU** number.
- Enter a modifier name in the **Item Name** field.
- Select the **Category** and **Subcategory** from the dropdowns.

SKU * 42852432364 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: American Cheese

Button Label * 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

Available Online

Delete Inventory Movement Duplicate All Items First Item Prev Item Next Item Last Item Save 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.

SKU * 45998626419 Item Name * American Cheese Price * 0.00 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: American Cheese

Button Label * 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

Available Online

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

NEW ITEM Logged In: EPI Agent 09:28:12 AM Thu Aug 11, 2022

7. Tap **Save**.

Add Price to a Modifier

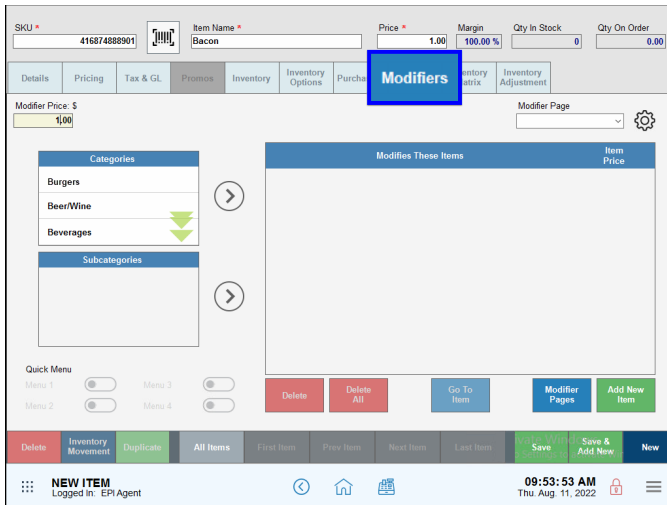
Merchants can also assign a price to modifiers, such as adding a charge for extra cheese or bacon to a hamburger.

1. From **Home**, navigate to **Items > Items Details**.
2. Create a modifier.

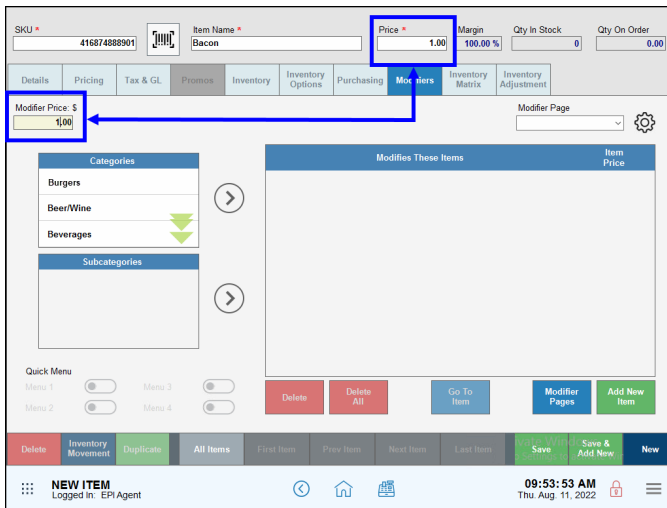
3. Enter a **Price** for the modifier.

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

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**. 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.

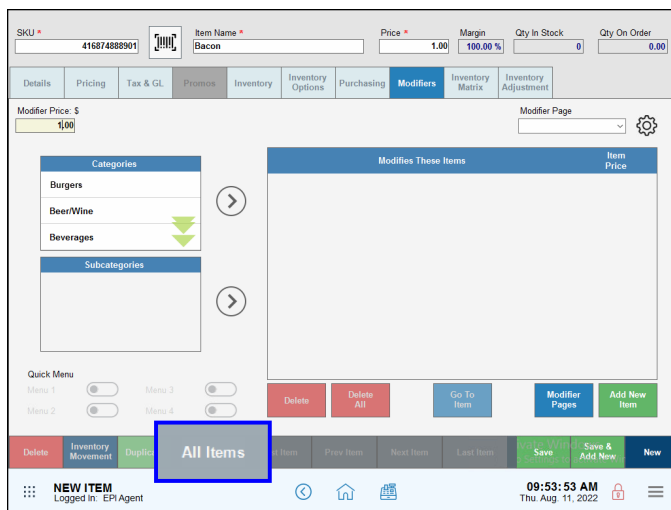
Attaching Modifiers

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

Attach an Individual Modifier

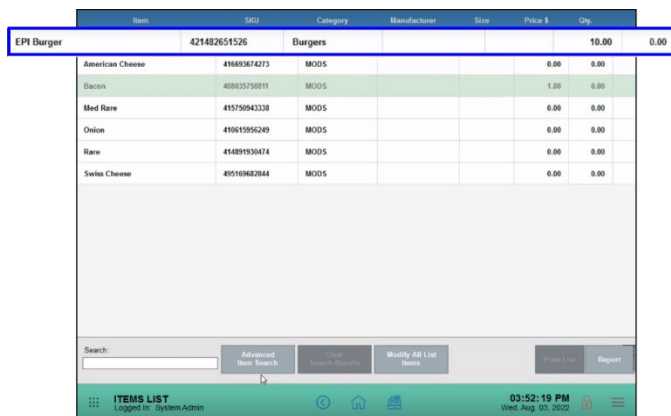
Attach modifiers to root items selected from the **Items List** page. This method is more suited to smaller, less complex menus.

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

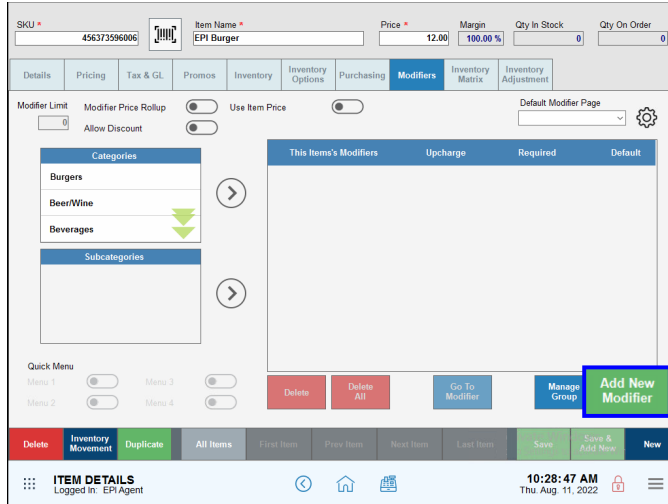


NOTE: You can also access the Items List from the **Home** screen, and then navigating to **Items > Items List**.

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

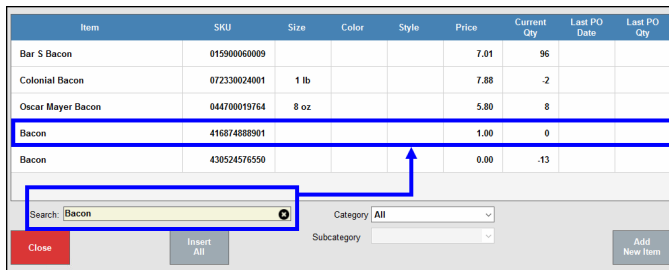


3. Tap the **Modifiers** tab.
4. Tap **Add New Modifier**.

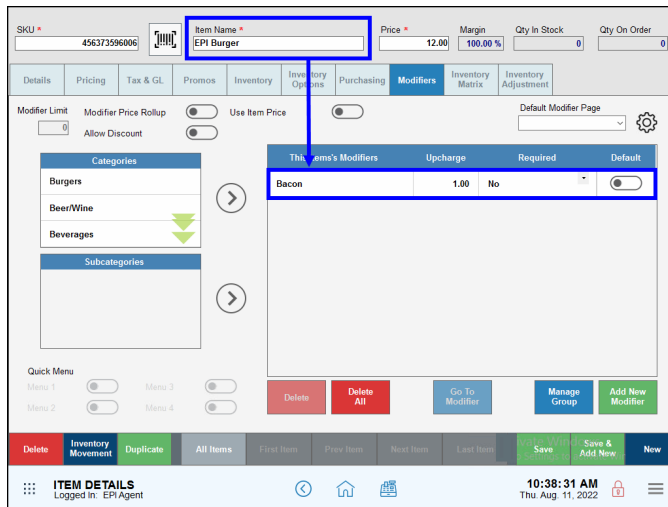


5. Select a modifier to attach.

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



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



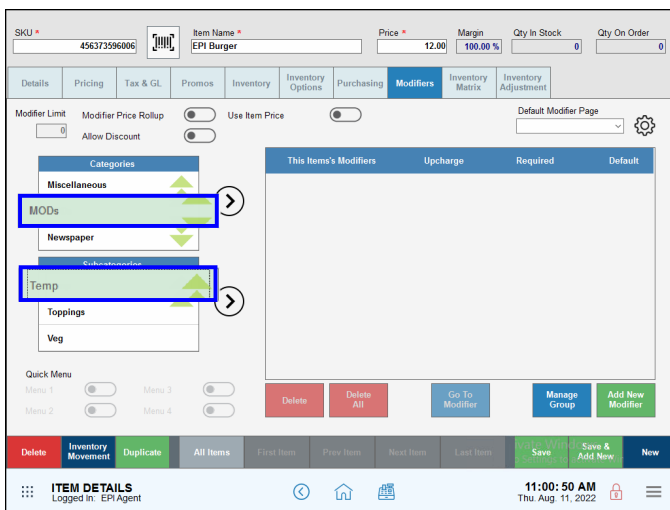
7. Tap **Save**.

8. Repeat as necessary to attach more modifiers.

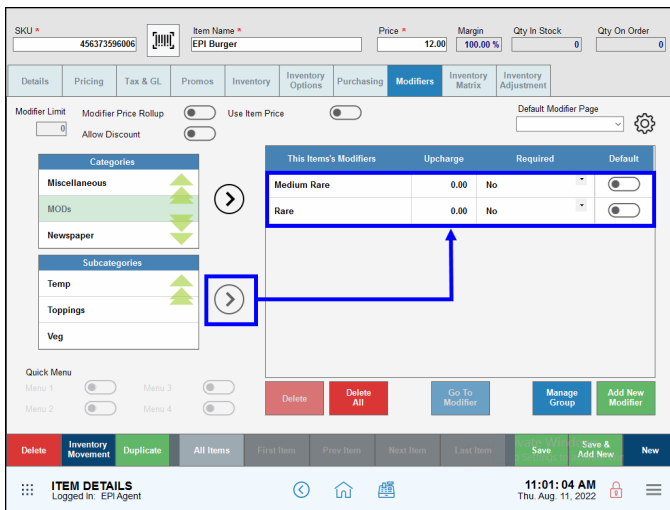
Attach Modifiers by Subcategory

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.

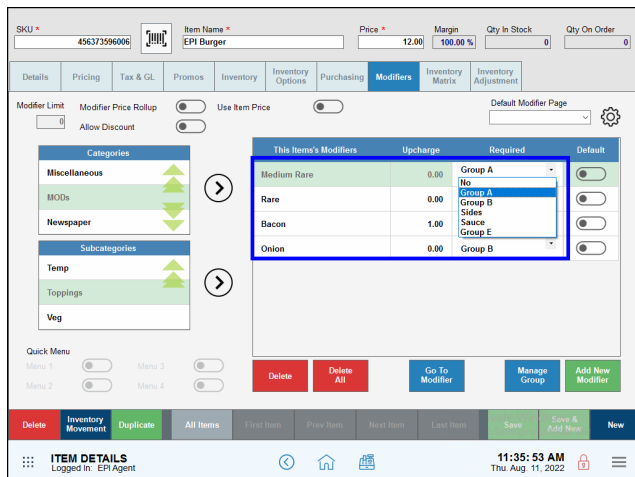


5. Tap **Save**.
6. Repeat as necessary to add more modifiers.

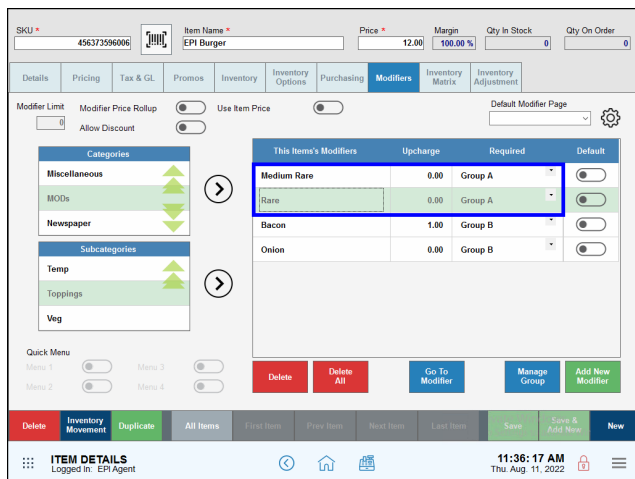
Group Modifiers

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

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.



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



5. Tap **Save**.

Manage 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 new screen 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**.

For assistance, contact our 24/7 Technical Support Team at (800) 966-5520 – Option 3 or support@electronicpayments.com.

