

Banquet and Catering

Objectives:

All pictures below will be shown enlarged at the end of the document.

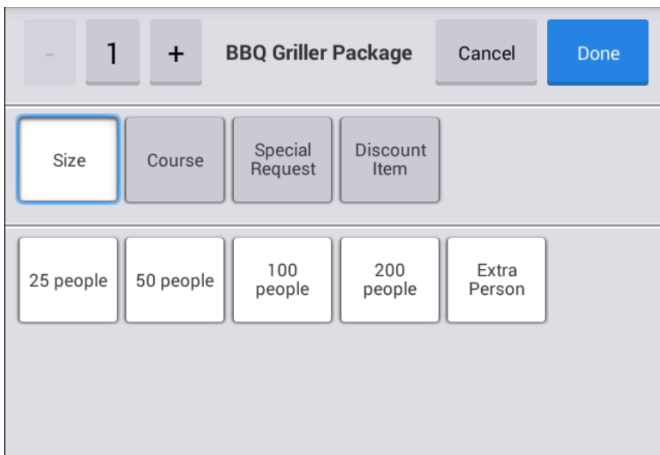
This guide will teach you all you need to know about taking Banquet and Catering orders with Toast.

Please keep in mind this process could change in time as a more streamlines Banquet and Catering process could be added in the future by Toast.

Taking a Banquet/Catering Order:

You can setup catering packages in the POS menu just like regular items. We can add sizing options to reflect the amount of people attending the event. This is great if you offer a per person discord for larger parties.

On top of that you can add an extra “Per Person” option to add extra people to a larger package or set a custom quantity for a party.



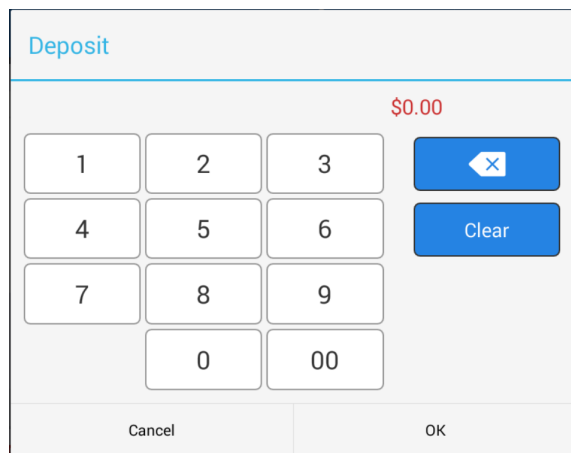
1.1 – Sizing by People

Taking a Deposit:

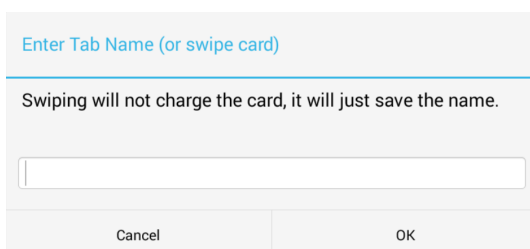
This is usually the first step for most restaurants, a customer calls you on the phone to schedule their event. Depending on your business policies you might require the customer make a deposit before scheduling.

To make sure that the deposit is properly paid, and the order can be found easily on the day of the event follow these steps.

1. Start a new quick order and navigate to Banquet/Catering -> Deposits -> Pay Deposit. Your POS might have it in a different spot depending on your needs.
2. It will prompt you for a price, enter in the amount of the deposit. See 2.1
3. Now press you “Tab” button on screen, and enter in the full name and number of the customer, this will help you find the order on the day of the event. See 2.4
4. Now select your “Dining Menu” and select either Banquet or Catering. See 2.3
 - a. Choosing Banquet will prompt you for a date/time of event.



2.1 Setting Deposit Price



2.2 Entering customer name

Banquet and Catering

- b. Choosing Catering will prompt you for date/time as well as delivery information from the customer.

When you have completed the above steps, you are now ready to have your customer pay for the deposit. It would be best to also inform your customer to hold on to the receipt till the day of the event, so they have their order number incase the order can't be found for any reason. If you are using a dedicated terminal for taking deposits we can also setup the terminal to email a receipt to your customers.

Things to Remember about taking Deposits

When you take a deposit your setting up what we call a "Future Order" and as such the order will remain on your paid orders screen until the day of the event. This is normal behavior and will not affect your closing procedures. This is also why it's important to add a name to the Tab of the order because you can see the customers name on the paid orders screen. See 3.1

If the customer is ONLY making a deposit DO NOT add any other items to the receipt. Only add the actual packages to the receipt when they are ready to pay in full for the event. If you add a deposit and other unpaid items to the receipt it will show up as an unpaid check at the end of the day.

Dining Option	
Dine In	<input type="radio"/>
Take Out	<input type="radio"/>
Delivery	<input type="radio"/>
Banquets	<input type="radio"/>
Catering	<input type="radio"/>

2.3 Choose your Dining Option

2. Add the customer name to tab so the order is easy to find later.

3. Select your dining option.

1. Select Pay Deposit and enter deposit amount.

4. Pay for the deposit.

TEST MODE

2.4 All steps as seen on the main ordering screen.

Opening an Existing Order with a Deposit:

The time has come and your customer is ready to pay for the event in full. Since they previously made a deposit your customer will have an open order on the Paid Orders screen. From any ordering screen you will see an option at the top called "Previous Checks". Select that option and click on the "Paid Orders" tab.

Sort by: Check Number	Check #	Customer Name	Date	Type	Amount
#2	D-IN John Doe, (123)456-7890	@Jan 31	Cash	\$0.00	
	Deposit		Cash	\$500.00	
#3	D-IN Sue Brown, (098)-765-4321	@Jan 31	Cash	\$0.00	
	Deposit		Cash	\$500.00	
#5	D-LIN Andrew D. 503-754-6338	@Feb 2	Cash	\$0.00	
	Deposit		Cash	\$500.00	

3.1 Here are 2 banquet orders, and 1 catering order.

You will see a list of all opened checks, this includes any banquet/catering orders as well as any open tables/bar tabs in your restaurant. Deposit orders can be easily identified because they should say "Deposit" in the bottom left corner, and they will have a customer name and phone number in the order information. See 3.1

To open the order just tab the order you want to open and click the update button that appears at the bottom of the screen.



Banquet and Catering

Paying for a Banquet:

Name	Qty	Each	Total
Deposit	+		VOIDED
Banquet/Catering			
200 people Mexican Package	1	\$1,000.00	\$1,000.00

Tab Split Cancel Hold Send

Balance Due: **\$500.00** TOTAL: **\$1,000.00**

Discnt Banquets Fast Cash Print Pay (\$)

4.1 Applying a deposit to an event.

Now you have resumed an order where a customer has paid a deposit. The customer has informed you they are ready to pay for their event in full. This is the time where you will be adding the rest of the order.

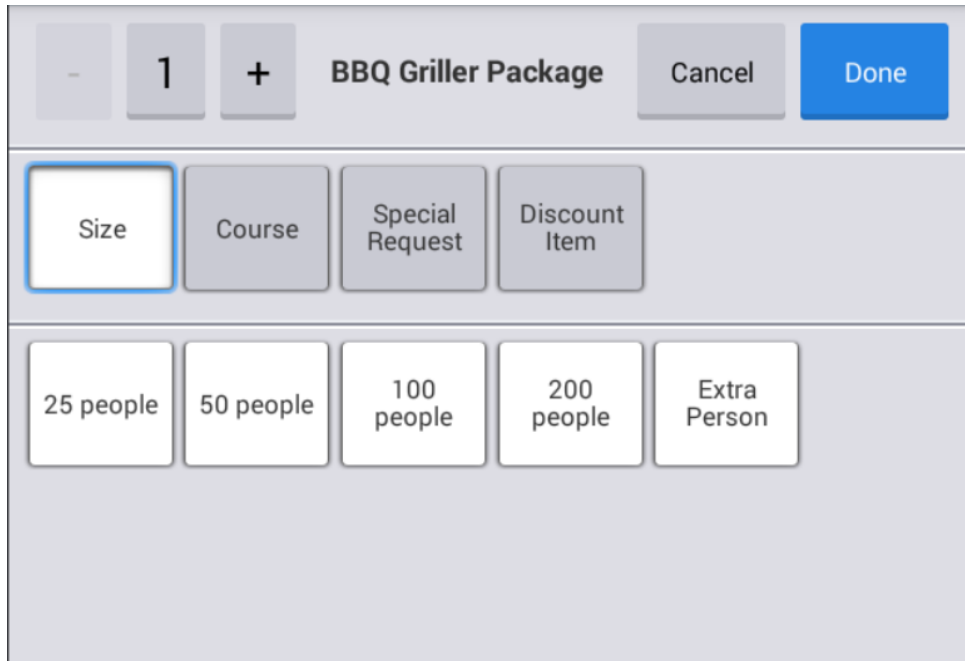
First you want to add your banquet/catering package to the order, then you want to void the deposit item. Voiding the deposit item will credit the amount of the deposit to the order. You can see in image 4.1 that our Total is 1,000 while our balance due is \$500

Charging a Banquet/Catering event to an account.

Alternatively, you also have the option to charge an event to a "House Account". The only difference is that a house account has to be created in the Toast Web Portal, and done by a user with those permissions. This option works well for very large events where you want to invoice your customer at a later date, or work out a payment plan.

Banquet and Catering

Enlarged Pictures

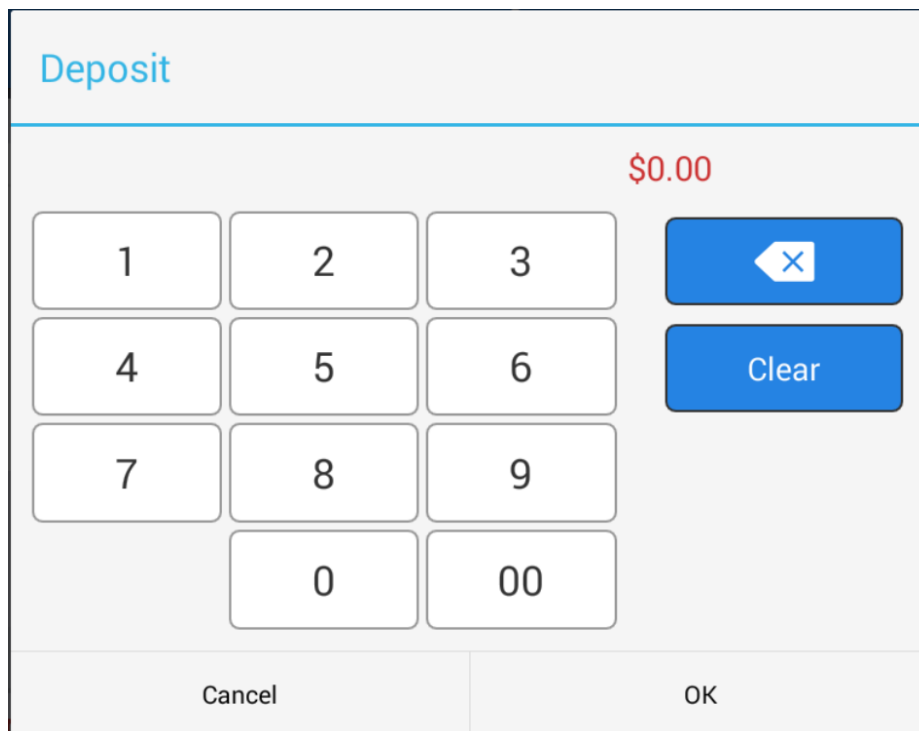


- 1 + BBQ Griller Package Cancel Done

Size Course Special Request Discount Item

25 people 50 people 100 people 200 people Extra Person

1.1 Sizing options by people



Deposit

\$0.00

1 2 3

4 5 6

7 8 9

0 00

← x

Clear

Cancel OK

2.1 Setting Deposit Price



Banquet and Catering

Enter Tab Name (or swipe card)

Swiping will not charge the card, it will just save the name.

Cancel

OK

2.2 Entering customer name

Dining Option

Dine In

Take Out

Delivery

Banquets

Catering

2.3 Choose your Dining Option

Banquet and Catering

TEST MODE - Order #2

PREVIOUS CHECKS LOOKUP SWITCH USER

Name	Qty	Each	Total
Banquet/Catering			
Deposit	1	\$500.00	\$500.00

2. Add the customer name to tab so the order is easy to find later.

3. Select your dining option.

1. Select Pay Deposit and enter deposit amount.

4. Pay for the deposit.

TEST MODE

2.4 All steps as seen on the main ordering screen.

OPEN CHECKS PAID CHECKS CLOSED CHECKS + NEW ORDER LOOKUP SWITCH USER

Sort by: Check Number

Check #	Status	Customer Name	Phone	Date	Amount
#2	D-IN	John Doe	(123)456-7890	@Jan 31	\$0.00
Deposit					Cash \$500.00
#3	D-IN	Sue Brown	(098)-765-4321	@Jan 31	\$0.00
Deposit					Cash \$500.00
#5	DLRY	Andrew D.	503-754-6338	@Feb 2	\$0.00
Deposit					Cash \$500.00

3.1 Here are 2 banquet orders, and 1 catering order.



Banquet and Catering

#2, Tab: John Doe, (123)456-7890, Banquets Andrew Dillon
Serve Wednesday, Jan 31 at 6:00 PM

Name	Qty	Each	Total
Deposit	+		VOIDED
<i>Banquet/Catering</i>			
200 people Mexican Package	1	\$1,000.00	\$1,000.00

Tab Split Cancel Hold **Send**

Balance Due: \$500.00 TOTAL: \$1,000.00

Discnt Banquets **Fast Cash** Print **Pay (\$)**

4.1 Applying a deposit to an event.