



Toast 3rd Party Integration Caveats

efish receives very limited data from Toasts Data export. These are just the caveats we have run into so far due to Toast's Limitations. Keep in mind, additional caveats may arise depending on how your location uses Toast, how the initial set up was done, Toast updates, etc.

- **STEPS 1-3 on the "Toast Integration Set Up" Document UNDER "Client Instruction" MUST BE COMPLETED BY CLIENT BEFORE DATA WILL BE AVAILABLE FOR EXPORT:** this means we will NOT be able to reimport data for ANY dates BEFORE the date which the client completed each of them CORRECTLY.
 - If you need this document, please send an email requesting the "Toast Integration Set Up" Document to support@pointblanksoftware.com
- **NO REIMPORT ATTEMPTS BEYOND 7 Days:** Toast ONLY KEEPS 7 DAYS worth of data on their S3 system, any attempts to re-import data older than that will result in failure and loss of previous Data.
 - the efish import will check to ensure orderdetails, or timeentries has some data before attempting to wipe and import, if BOTH of those tables are empty, the import will result in a missing data failure.
- **DO NOT CHANGE THE NAME OF ANYTHING IN TOAST** (employees, menus, sales categories, items, jobs, etc.)
 - Any Name Changes in Toast will cause reporting issues in efish.
- **EMPLOYEE IMPORT DELAY:** only employees who have clocked in and out for at least one shift can be imported to efish by the following day.
 - Employees job codes will only show up in efish 24hrs after they have clocked In/out as that job code in Toast
 - efish does not deactivate any jobs or employees due to this limitation.
 - this will be considered a "cumulative" import, meaning as employees are found in the timeentries file they will be added, as well as the jobs they work.
 - NEVER Change an employee's JOB Code in Toast by clearing their current job code from the job field and typing in a New Job Code Name – This will cause reporting issues every time. You must instead create the New Job Code in Toast and then add it to the employee.
- **NO EMPLOYEE ID (Name Match Only):** order details provided by Toast only contain an employee name field, no employee ID.
 - This means when attempting to match the employee that owned that check, we can only use an exact name match to the employees active for that location.
 - If Toast clients have multiple people with the same name, they should ensure there is some uniqueness to the name so that we can properly match the check to employee and ensure tip data is given to the correct person.



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- **NO DISCOUNT TYPE DISTINCTION:** Toast does not provide efish enough discount detail to be able to always apply discounts against a specific item or in a specific category.
 - Due to this limitation, a single type named "Discount" will be used.
 - Discounts are applied proportionately against the items of the check therefore proportionately against categories as well.
 - This will likely conflict with your toast POS sales numbers for Categories and Profit/Revenue Centers breakdowns, resulting in minor differences in the allocations. (A case can actually be made that efish actually provides a more accurate allocation.)
 - Total sales and total discount numbers will NOT be affected.
- **NO SERVICE CHARGES:** Toast Allows users to create "Service Charges" but does not include that data in their data export which means efish will NOT pick up ANY service charges, Locations using them will need to manually account for them when doing AP on a regular basis.
- **NO PAID OUTS:** Toast does not include Paid Outs in their data export which means efish will NOT pick up any Paid Outs, Locations will need to manually account for them when doing AP on a regular basis.
- **NO LABOR DEPARTMENTS:** Toast Does NOT support the use of Labor Departments > (Front of house, Back of House, etc.)
- **NO Dining Options Sales Breakdown:**
 - "Dining options in Toast are not the same as "Revenue Centers" (which will show up as "Profit Centers" in efish.
 - Toast does not send 3rd parties info on "Dining Options" in their Data export. Therefore, if you wish to see these sales broken out you would need to create a "Revenue Center" for this in Toast and use that for all Sales of that type. Toast does not send us the 'Dining Option' breakdown for sales but rather the 'Revenue Center' Breakdown (which efish then displays in the Daily Journal > Profit Centers Tab.
 - See example below that shows that the "Events" sales in Toast falls under the "Dining Room" Revenue Center for those checks which is why efish will display those sales as part of the "Dining Room" Profit Center.

order	Revenue Center (sent to efish from Toast)	Dining Options (NOT sent to efish from Toast)
1	Dining Room	Events
2	Dining Room	Events
3	DoorDash	DoorDash - Delivery

- **ITEMS MUST ONLY BE SET TO 1 SALES CATEGORY:** Toast DOES allow you to set items to multiple categories within Toast (YOU MUST ENSURE YOU DO NOT ALLOW ITEMS TO BE SET TO MULTIPLE SALES CATAGORIES IN TOAST)



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- o efish as well as most POS's DO NOT allow for an item to be assigned to more than 1 Sales Category because this can cause all sorts of reporting issues.
- o efish uses 'Sales' categories for reporting, NOT 'Menu' categories as our focus is not POS but Sales/Accounting

Toast requires that "Hours and Services" which correspond to "Shifts" in efish > administration > Location Settings > Shifts Tab, MUST be set up in Toast using the instructions below:

1. In [Toast Web](#), navigate to *Reports > Settings > Hours/services*.
2. In the Services section, add the name of any service period that applies to your restaurant (e.g. Breakfast, Lunch, Dinner, etc.). You can select + *Add Row* to create as many additional service periods as you want, or the *trash can* icon to delete a service period.
3. Select *Save* at the top of the page to update the schedule options below.
4. In the Day Schedules section, you can set up different schedules for specific days if needed. A common example of this is setting up a "Weekday" and "Weekend" schedule. If your service periods happen on different hours each day of the week, you should create a new schedule for every day. Make sure no shifts overlap each other on any given day.
 - For each schedule you create, check the box in the Available? column for any service period that applies.
 - Select the *Edit* button next to each checked-off service period to adjust the hours for that service type on that schedule. In the example below, you'll see a "Weekdays" schedule with a "Lunch" and "Dinner" service.

Schedule Name		Service	Available?	Hours	
		Breakfast	<input type="checkbox"/>	no hours set	Edit
Weekdays		Lunch	<input checked="" type="checkbox"/>	12:00 PM - 3:30 PM	Edit
		Dinner	<input checked="" type="checkbox"/>	3:30 PM - 9:00 PM	Edit

5. Lastly, select the checkboxes for days that correspond with the schedule you created to indicate when your restaurant is open for business. In this example, we created Weekends and Weekdays schedules, so we've selected each weekday and each weekend day to match their appropriate schedule.

Weekly Schedule							
Schedule	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekdays	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Weekends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



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6. Save and publish your changes.

- *Changes will be reflected in efish the following day after sales are imported.*
- *DO NOT attempt to change or add new "Shifts" in efish directly as they will be overwritten by the POS the following day.*

COMMON SALES CATEGORY DATA MISMATCH ISSUES DUE TO MULTIPLE SALES CATEGORIES SET IN TOAST: (an indication of this issue would be if NET SALES (excluding services charges) & some Sales Category Totals DO NOT match up, or if you see categories in efish that are not in Toast)

- efish as well as most POS's DO NOT allow for an item to be assigned to more than 1 Sales Category because this can cause all sorts of reporting issues.
 - However, Toast DOES allow an item to be set to multiple sales categories at once, because the Sales Categories in TOAST can be set at the Menu Level, Menu Group Level within each Menu and even the Item Level within each Menu Group, which will cause mismatches.
- **For example:** say you have 2 Menus Set up in Toast:
 - Menu Level: Top Level
 - Food: set to the "Food" Sales Category in Toast
 - NA Bev: set to the "NA Bev" Sales Category in Toast
- **MENU GROUP LEVEL FOR the "Food" Menu:** 2nd Level (sub level to Menu in Toast)
 - **APPS:** set to inherit the Sales Category in Toast from the "Food" Menu (aka set to the "Food" Sales Category)
 - **ENTRES:** set to inherit the Sales Category in Toast from the "Food" Menu (aka set to the "Food" Sales Category)
 - **DRINKS:** set to inherit the Sales Category in Toast from the "none" Menu (aka not set to a Sales Category)
 - Most items in the "DRINKS" MENU GROUP are actually Non Alcoholic Beverages (These items are on both the "NA Bev" MENU and the "Food" MENU under the MENU GROUP "DRINKS") **this means that instead of setting the items under the "DRINKS" MENU GROUP to *inherit the "none" SALES CATEGORY, you should instead select the "NO, SPECIFY CATEGORY HERE" option in Toast and chose the correct option, "NA Bev" for most items in this case.**
 - You need to check every menu item in Toast under every Menu Group and ensure they are set up to NOT inherit sales categories but rather use the **"NO, SPECIFY CATEGORY HERE"** option in Toast and chose the correct option,
- **From what we can tell it looks like you would do this in toast by navigating to [Menus](#) > [Edit Menus](#) > Click the Menu Name (ex: Food)**
 - Scroll down to "Groups" and click the Group name.



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- Scroll down to the items section and select the first item in the menu group.
- Scroll down to "Reporting" and ensure that the item's sales category is set correctly.

Click this option and manually select the correct sales category for each item.

Reporting

Inherit Sales Category from Food ☒ Yes ☐ No, specify category here

- **Note:** once you make the change under reporting Toast may require you to enter a price for the item, update the price for the current menu group you are changing only.
- Repeat for remaining items in each menu group, ensuring that the sales category is set correctly for each item.
- ONCE ALL Steps Above have been completed, you must contact support@pointblanksoftware.com to have them remove any applicable categories from efish side that should not be there in order to fix reporting numbers for these items moving forward.