



A Guide to Menu Optimization for Mobile Ordering

(Integration via Square Merchant Account)

Crafted by WTF!?! Where's The Foodtruck?

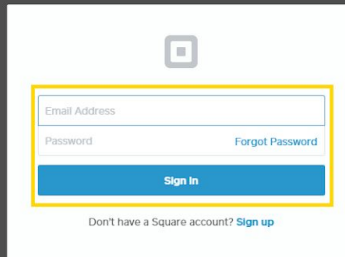
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(Logging in and Accessing Menu Items)

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Logging in and Accessing Menu Items

First, let's get logged into your Square Merchant account.

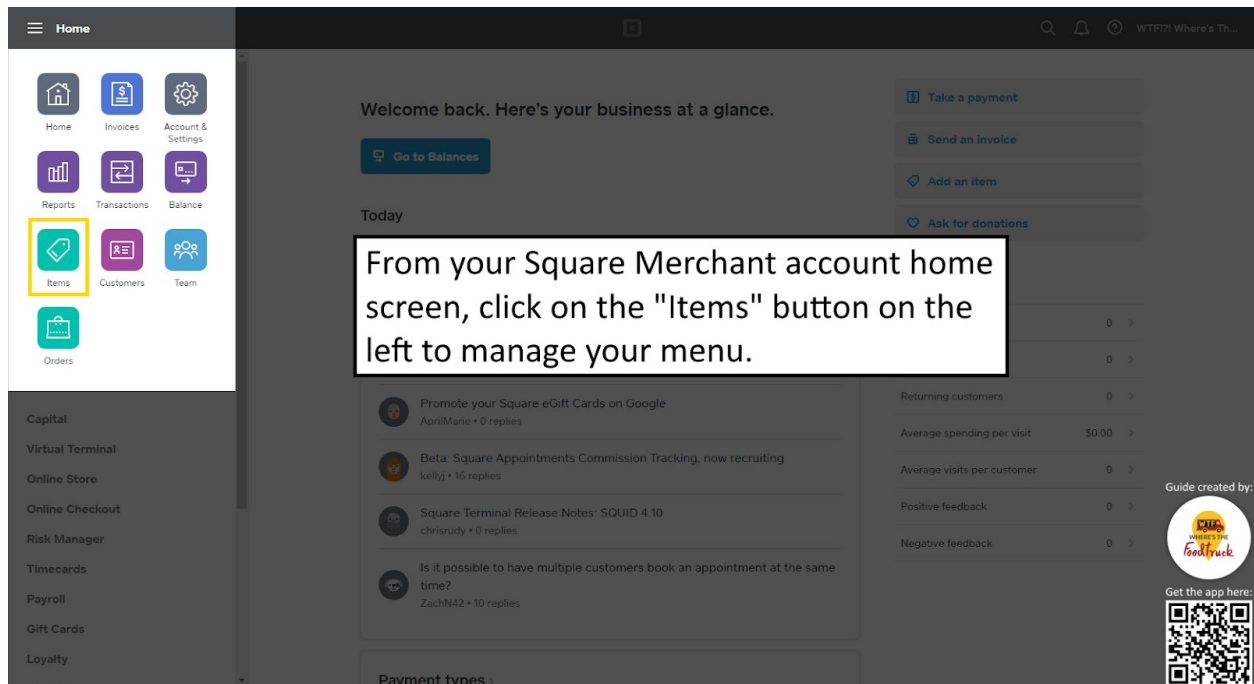


The login form is centered on a white background. At the top is the Square logo. Below it is a yellow rectangular box containing the login fields. Inside the box, there is an 'Email Address' input field, a 'Password' input field, and a 'Forgot Password' link. Below these fields is a blue 'Sign In' button. Below the yellow box, there is a link that says 'Don't have a Square account? Sign up'.

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The screenshot shows the Square Merchant home screen. On the left is a sidebar with a 'Home' header and a menu of icons. The 'Items' icon, which shows a notepad and pencil, is highlighted with a yellow box. The main area of the screen displays a welcome message, a 'Go to Balances' button, and a 'Today' section with various business metrics and news items. A text box is overlaid on the 'Today' section.

Welcome back. Here's your business at a glance.

[Go to Balances](#)

Today

From your Square Merchant account home screen, click on the "Items" button on the left to manage your menu.

Take a payment
Send an invoice
Add an item
Ask for donations

Returning customers: 0
Average spending per visit: \$0.00
Average visits per customer: 0
Positive feedback: 0
Negative feedback: 0

Payment types

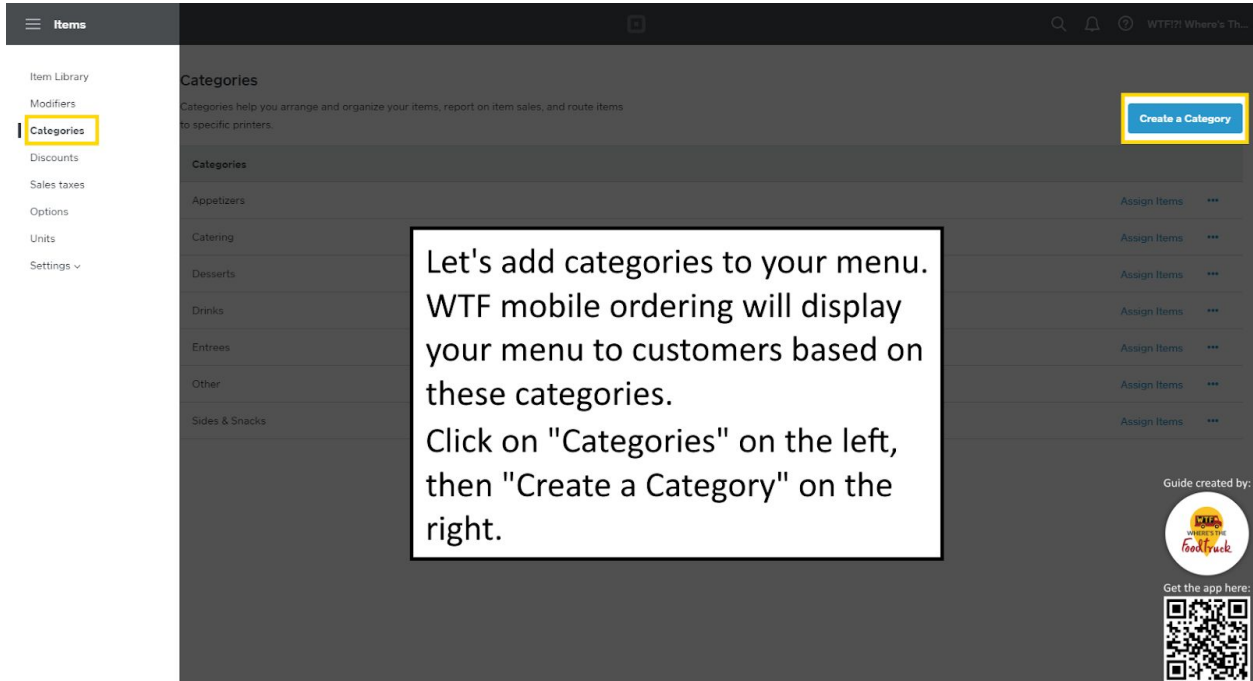
Adding Modifiers for your Menu Items

If you're already using Square, you likely have items created in your library. If not, this screen prompts you to create new items. We'll get to that soon.

Let's start with Modifiers first. Click "Modifiers" on the left.

Now click on "Create a Modifier Set" and this side panel displays. Name your modifier set, then add possible modifiers. For our pizzas, we add a "Pizza Toppings" modifier set, then add ways our pizzas can be modified. These can be with or without an additional charge to the customer. When you're done, click "Save".

Adding Categories for your Menu Items



Items

Item Library
Modifiers
Categories
Discounts
Sales taxes
Options
Units
Settings

Categories

Categories help you arrange and organize your items, report on item sales, and route items to specific printers.

Create a Category

Categories

Appetizers Assign Items

Catering Assign Items

Desserts Assign Items

Drinks Assign Items

Entrees Assign Items

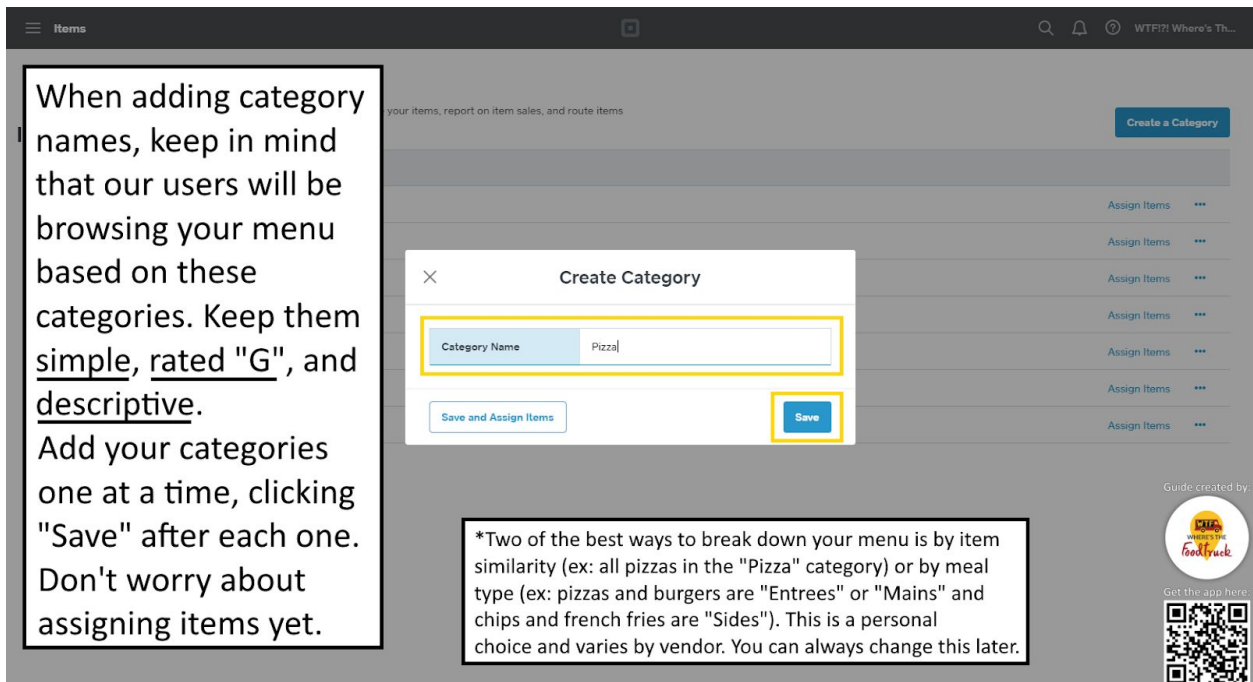
Other Assign Items

Sides & Snacks Assign Items

Let's add categories to your menu. WTF mobile ordering will display your menu to customers based on these categories. Click on "Categories" on the left, then "Create a Category" on the right.

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Items

Categories help you arrange and organize your items, report on item sales, and route items to specific printers.

Create a Category

Create Category

Category Name Pizza

Save and Assign Items Save

Assign Items

Assign Items

Assign Items

Assign Items

Assign Items

Assign Items

Assign Items

When adding category names, keep in mind that our users will be browsing your menu based on these categories. Keep them simple, rated "G", and descriptive. Add your categories one at a time, clicking "Save" after each one. Don't worry about assigning items yet.

*Two of the best ways to break down your menu is by item similarity (ex: all pizzas in the "Pizza" category) or by meal type (ex: pizzas and burgers are "Entrees" or "Mains" and chips and french fries are "Sides"). This is a personal choice and varies by vendor. You can always change this later.

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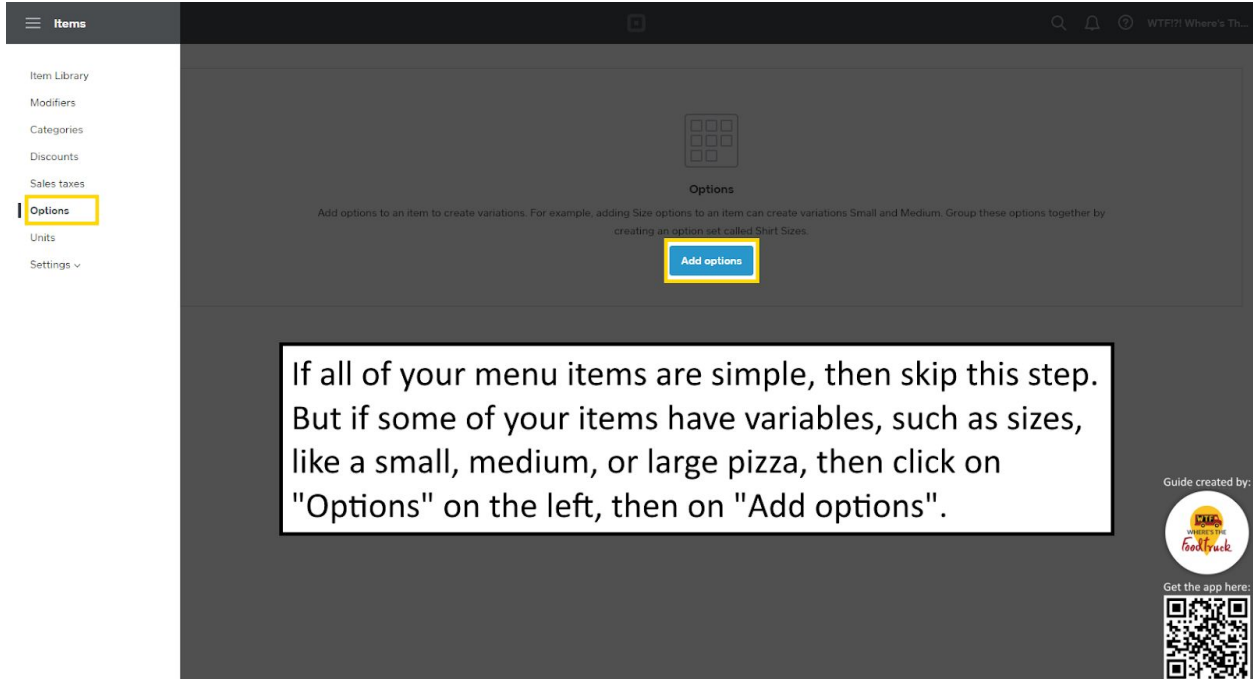
Adding Sales Tax Settings for your Menu

When a customer places an order through the WTF Platform, our platform will automatically calculate the sales tax to collect upon checkout. Note: You are responsible for paying all sales taxes for sales through our platform. We do not monitor the sales tax rates settings in vendor accounts. It is important for you to set and update your sales tax to account for this. If you *include* sales tax in your pricing, this is still a good idea to set and update for your own internal accounting purposes.

The screenshot displays the WTF! Where's The Foodtruck! web application. On the left, a sidebar menu under the 'items' header includes 'Item Library', 'Modifiers', 'Categories', 'Discounts', 'Sales taxes' (highlighted with a yellow box), 'Options', 'Units', and 'Settings'. The main content area is titled 'Taxes' and features a 'New Tax' button. A text overlay box in the center reads: 'Now let's take care of collecting taxes on your sales. Click on "Sales taxes" on the left, then on the right enter a description and tax rate. Most vendors will add the sales tax to each sale. If you include taxes in your pricing, then use the dropdown box to make the change. Now Save it. *We recommend leaving all locations checked.' To the right, the 'Create Tax' modal is open, showing a form with the following fields: 'TAX INFORMATION' with a text input for 'LA County tax' and a percentage input for '9.35%', a dropdown for 'Add Tax to Item Price', an 'Enable Tax' toggle switch, and 'LOCATIONS' with checkboxes for 'WTF!?! Where's The Foodtruck?' and 'Available at all future locations'. A 'Save' button is at the bottom right of the modal. At the bottom of the main content area, there is a QR code and a note: 'Guide created by: WTF! Where's The Foodtruck!'.

Adding Options to your Menu Items

Adding an Option Set is a good idea if you offer sizes or other variants on your menu items. For example, you can set small, medium, and large, each at a unique price.



The screenshot shows the 'Items' management interface. On the left sidebar, the 'Options' menu item is highlighted. The main content area displays a grid icon and the heading 'Options'. Below the heading, there is a text box explaining that options can be added to items to create variations, such as sizes. A blue 'Add options' button is visible. A large text box provides instructions: 'If all of your menu items are simple, then skip this step. But if some of your items have variables, such as sizes, like a small, medium, or large pizza, then click on "Options" on the left, then on "Add options".' The bottom right corner includes a logo for 'WTF?!? Where's The Foodtruck?' and a QR code.

Items

Item Library
Modifiers
Categories
Discounts
Sales taxes
Options
Units
Settings v

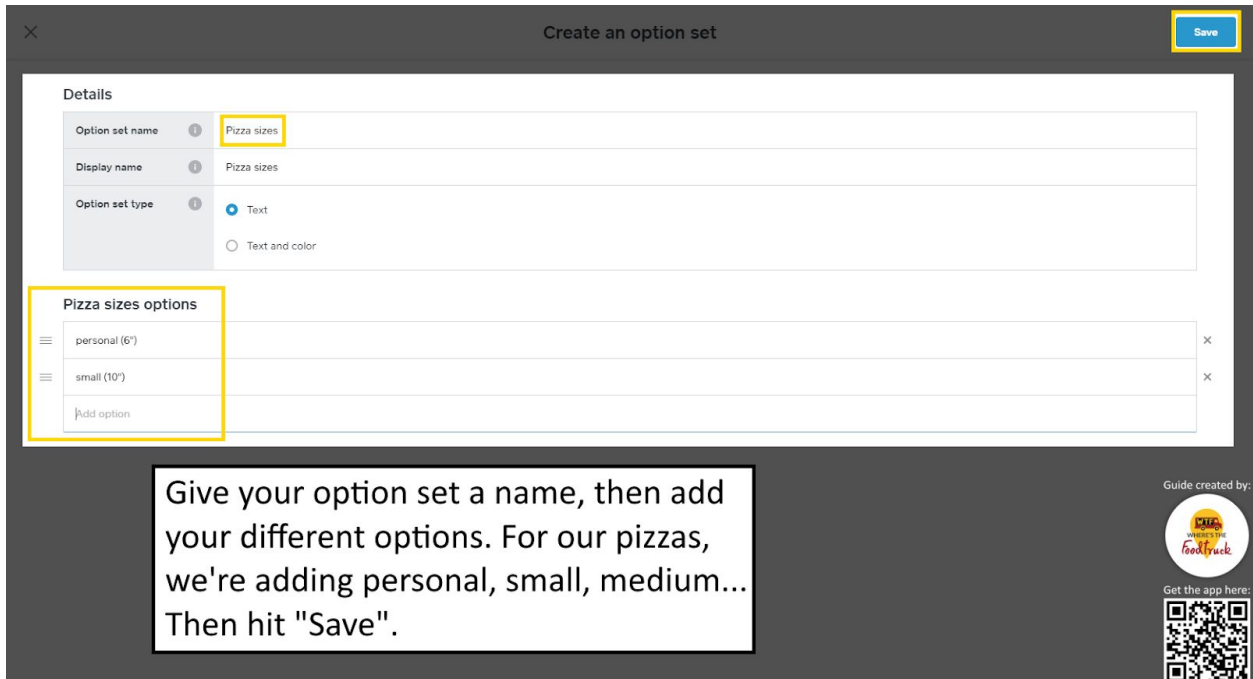
Options

Add options to an item to create variations. For example, adding Size options to an item can create variations Small and Medium. Group these options together by creating an option set called Shirt Sizes.

Add options

If all of your menu items are simple, then skip this step. But if some of your items have variables, such as sizes, like a small, medium, or large pizza, then click on "Options" on the left, then on "Add options".

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The screenshot shows the 'Create an option set' form. The 'Details' section includes fields for 'Option set name' (filled with 'Pizza sizes'), 'Display name' (filled with 'Pizza sizes'), and 'Option set type' (with 'Text' selected). Below this, the 'Pizza sizes options' section shows a list of options: 'personal (6")', 'small (10")', and an 'Add option' button. A blue 'Save' button is in the top right corner. A large text box provides instructions: 'Give your option set a name, then add your different options. For our pizzas, we're adding personal, small, medium... Then hit "Save".' The bottom right corner includes a logo for 'WTF?!? Where's The Foodtruck?' and a QR code.

Create an option set

Save

Details

Option set name: Pizza sizes

Display name: Pizza sizes

Option set type: ☒ Text ☐ Text and color

Pizza sizes options

personal (6")

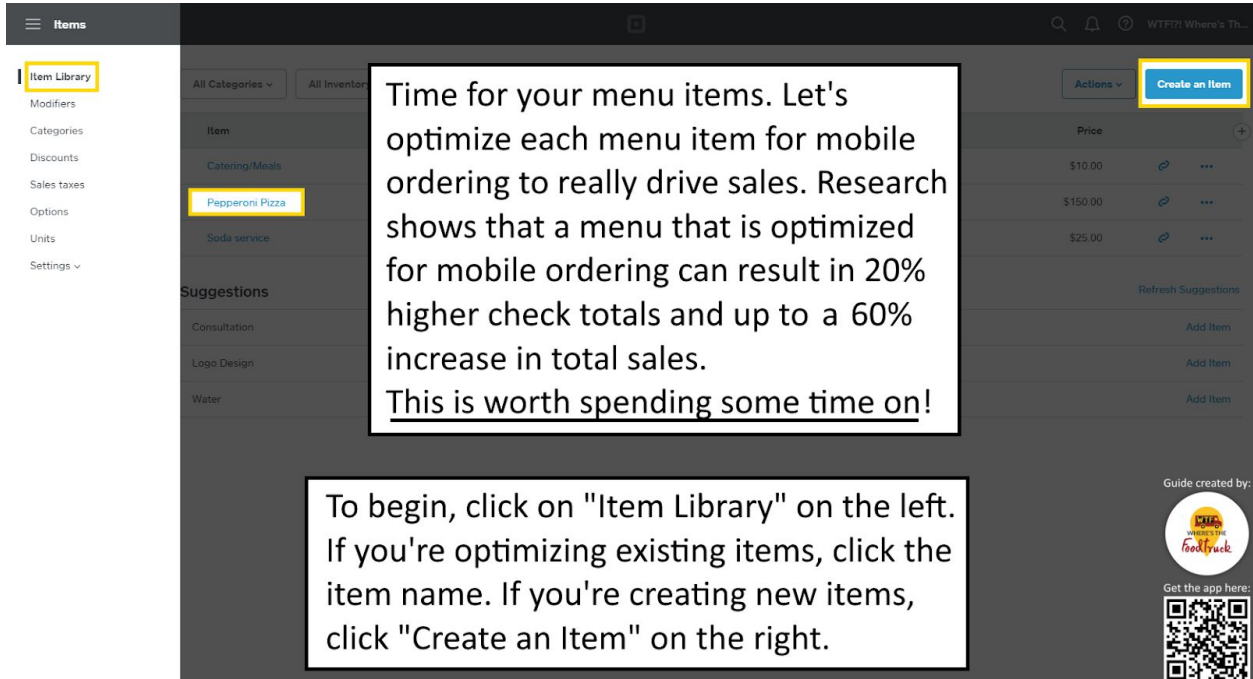
small (10")

Add option

Give your option set a name, then add your different options. For our pizzas, we're adding personal, small, medium... Then hit "Save".

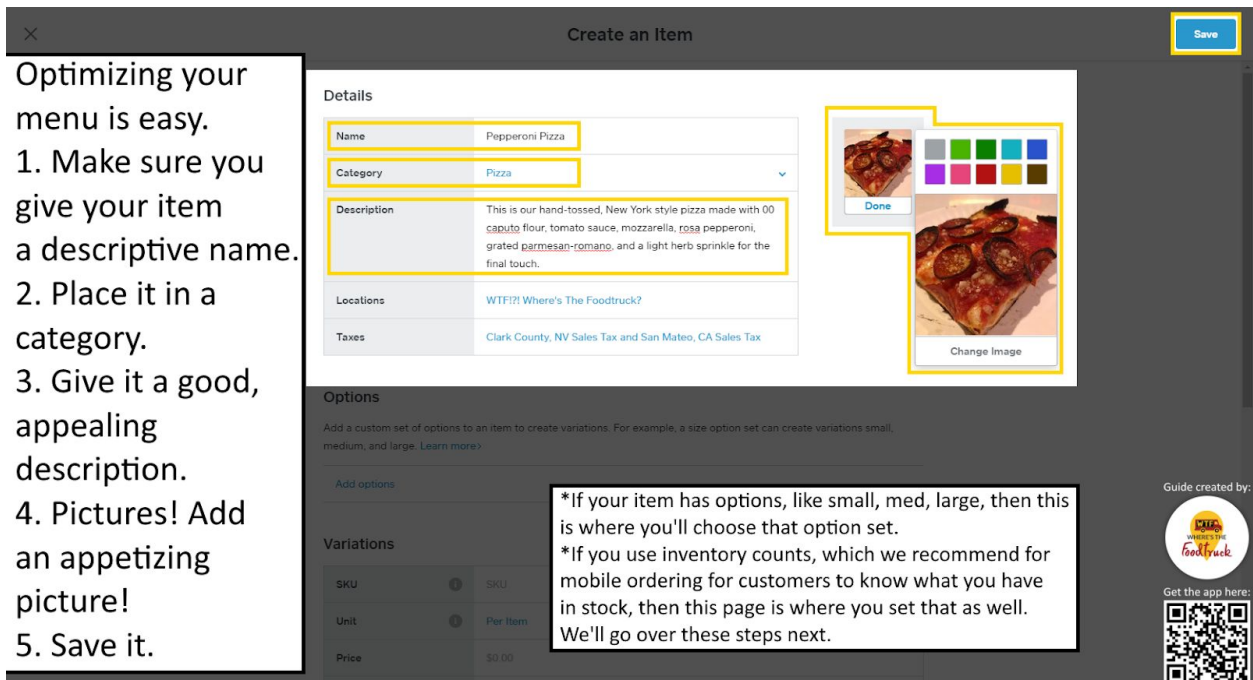
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Item Optimization: a short journey to increased sales



Time for your menu items. Let's optimize each menu item for mobile ordering to really drive sales. Research shows that a menu that is optimized for mobile ordering can result in 20% higher check totals and up to a 60% increase in total sales. This is worth spending some time on!

To begin, click on "Item Library" on the left. If you're optimizing existing items, click the item name. If you're creating new items, click "Create an Item" on the right.



Optimizing your menu is easy.

1. Make sure you give your item a descriptive name.
2. Place it in a category.
3. Give it a good, appealing description.
4. Pictures! Add an appetizing picture!
5. Save it.

*If your item has options, like small, med, large, then this is where you'll choose that option set.
*If you use inventory counts, which we recommend for mobile ordering for customers to know what you have in stock, then this page is where you set that as well. We'll go over these steps next.

Selecting Options (Variants) and Modifiers for Menu Items

To add an option set to a menu item, click "Add options" on the "Create an Item" menu and you'll see this pop-up. Select the option set that we created, or add a new option set. Then click "Next".

Create an Item [Save]

Details

Name: Pepperoni Pizza

Category: Pizza

Description:

Locations:

Taxes:

Options

Add a custom set, medium, and large

[Add options]

Options

Create option sets to group options. For example, a set called "Primary Color" may contain Black and White options.

Option set name: Search

Pizza sizes

Options

Add option

[Next]

Variations

SKU: SKU

Unit: Per item

Price: \$0.00

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Now confirm the options for your item that you set in the option set previously. If you need to add more options, you can do it here. Click "Next."

Create an Item [Save]

Options

Create option sets to group options. For example, a set called "Primary Color" may contain Black and White options.

Option set name: Pizza sizes

Display name: Pizza sizes

Pizza sizes options

personal (6")

small (10")

medium (12")

large (14")

Add option

Add option set

[Next]

Variations

SKU: SKU

Unit: Per item

Price: \$0.00

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For your menu item, select which options you offer from the option set you're adding to the item. To finalize, click on "Create X variations"

Create an Item

Save

Pepperoni Pizza

Create variations

The Pepperoni Pizza variations below will be created from your options.

- ☒ All variations
- ☒ personal (6")
- ☒ small (10")
- ☒ medium (12")
- ☒ large (14")

Create 4 variations

Options

Add a custom set of medium, and large

Add options

SKU

Unit

Price

SKU

Per Item

\$0.00

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You now have variations set for your menu item. If you are using inventory counts, click "Adjust Inventory" to add inventory for each variant.

Here you should also select your modifier set for this menu item, if applicable.

Create an Item

Save

Add option

Variations

☐ 4 variations

Variation	SKU	Price	In Stock
<input type="checkbox"/> personal (6")	SKU	\$8.00	None
<input type="checkbox"/> small (10")	SKU	\$10.00	None
<input type="checkbox"/> medium (12")	SKU	\$12.00	None
<input type="checkbox"/> large (14")	SKU	\$0.00	None

Add variation Adjust Inventory Edit Stock Tracking

Modifier Sets

Pizza Toppings ☐ Enable Customize

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Setting up Inventory Tracking for an Item with Variants

Setting up inventory tracking: by default, Square does not track inventory so shows "None". To track inventory with multiple item variants, click "Adjust Inventory".

Variation	SKU	Price	In Stock
<input type="checkbox"/> personal (6")	SKU	\$8.00	None
<input type="checkbox"/> small (10")	SKU	\$10.00	None
<input type="checkbox"/> medium (12")	SKU	\$12.00	None
<input type="checkbox"/> large (14")	SKU	\$0.00	None

Buttons: Add variation, Adjust Inventory, Edit Stock Tracking

When enabling or adding inventory, you will first select a reason, then add your inventory adjustment. Click "Done".

Variation	SKU	In Stock	Reason	Adjustment	New Stock
personal (6")		0	Stock received	20	20
small (10")		0	Inventory re-count		15
medium (12")		0	Damage	0	0
large (14")		0	Theft	0	0

Buttons: Cancel, Done

*When adding inventory, the most common reason is "Stock received". Sometimes there are miscounts, resulting in "Inventory recount". And unfortunately we all suffer losses, which is "Loss" or "Damage".

Setting up Inventory Tracking for a Simple Item (no variants)

Setting up inventory tracking:
by default, Square does not track inventory so shows "None". To track inventory with only one variant, click on "None" in the Variations section of the item.

Create an Item

Name: Green Burger

Category: Burgers

Description: Starting with 6 oz. of organic angus beef, we grill this bad boy to your preferred temperature, top it with an arugula spring mix, feta cheese, and a light drizzle of greek dressing and place it on a fresh-baked broche bun.

Locations: WTF!?! Where's The Foodtruck?

Taxes: Clark County, NV Sales Tax and San Mateo, CA Sales Tax

Variations

SKU	Unit	Price	Stock
	Per Item	\$0.00	None

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When enabling or adding inventory, you will first select a reason, then add your inventory adjustment. Click "Done".

*Here, you can also set low stock alerts. This will not impact WTF mobile ordering.

*When adding inventory, the most common reason is "Stock received". Sometimes there are miscounts, resulting in "Inventory recount". And unfortunately we all suffer losses, which is "Loss" or "Damage".

Edit variation

Details Manage stock

Locations and stock

☒ Available at 1 of 1 locations

☒ Available at WTF!?! Where's The Foodtruck?

☒ Tracking

Stock action: Stock received

Add stock: 10

☒ Low stock alerts

Low stock alert: 5

Done

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Enabling/Disabling Inventory Tracking and Low Stock Alerts

We highly encourage you to use inventory tracking. There are many reasons to do so. Focusing on mobile ordering, if you use inventory tracking, when the inventory count on one of your menu items reaches “0” during a shift, our platform will know this and will no longer allow a user to order the item through mobile ordering.

If you’re having trouble with inventory tracking, like Square shows you low stock alerts but you’ve got 20 portions left, you can adjust your inventory counts here in a matter of seconds, or you can disable tracking and our platform will not limit customer’s orders.

If this is a recurring problem, we suggest looking into the cause of the problem. There’s likely a calculation error or setting causing this. You’ll be a better operator by solving the issue and improving your systems. (We offer consulting services if you want some help.)

To enable/disable inventory tracking, flip this top toggle. To enable/disable low stock alerts, flip the bottom toggle.

*We encourage the use of inventory tracking for many reasons. With our mobile ordering, when one of your menu item's inventory hits "0" during a shift, we'll automatically disable future orders through our system, minimizing the effort you spend on tracking and providing a better experience for the customer.

Create an Item

Save

Locations WTF!?! Where's The Foodtruck?

Edit variation

Details Manage stock

Locations and stock

☒ Available at 1 of 1 locations

☒ Available at WTF!?! Where's The Foodtruck?

☐ Tracking

Add stock 10

☒ Low stock alerts

Low stock alert 5

Done

Pizza Toppings ☐ Enable Customize

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Menu Optimization Final Checklist

After setting your menu item's:


- Name
- Category
- Description
- Picture
- Options (if applicable)
- Modifiers (if applicable)
- Inventory (if applicable)

You're all done.

Click "Save" and go on to add/edit all of your items for mobile ordering optimization!

Edit Item Actions Save

Details

Name	Pepperoni Pizza	 Edit
Category	Pizza	
Description	This is our hand-tossed, New York style pizza made with 00 caputo flour, tomato sauce, mozzarella, rosa pepperoni, grated parmesan-romano , and a light herb sprinkle for the final touch	
Locations	WTF!!! Where's The Foodtruck?	
Taxes	Clark County, NV Sales Tax and San Mateo, CA Sales Tax	

Options 1


Pizza sizes: personal (6"), small (10"), medium (12"), large (14") Edit ...


[Add option](#)

Variations View stock history

☐ 4 variations

Variation	SKU	Price	In Stock	
<input type="checkbox"/> personal (6")	SKU	\$8.00	20	...
<input type="checkbox"/> small (10")	SKU	\$10.00	10	...

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Final Thoughts:

Take a moment to consider your menu when optimizing the information in your Square account. Restaurants spend thousands of dollars on photographers, content writers, graphic designers, and layout specialists to ensure their menus are optimized to increase sales. You don't need to spend that money, but with the same amount of effort and enthusiasm that you started this venture with, we *know* that you can combine great pictures, names, and descriptions to each of your menu items!

Mobile ordering is shown to increase an individual's average ticket spend by about 20%! And it's shown to increase total outlet sales by up to 60%! These are numbers that will positively impact your sales in a very BIG WAY!

The process of connecting your Square account with WTF is just as simple as marking yourself open. In the settings tab, you'll click "In-app ordering", then click "Connect" after checking the Terms & Conditions box. We'll sync all your menu data with our platform. When an order is placed through WTF, you'll get a push notification through our app and you'll receive the details in your Square Merchant account for you to update the status of each order. As you update the order status, we'll send push notifications to the customer so they're up-to-date. Processing, deposits, and everything still gets routed through your Square Merchant account. It doesn't get easier than that.

*One final note: while we think Square is a great system, we do not recommend the Square Register, shown below. As a closed system using Square's software, you cannot install our app onto it. Going with a tablet, you can keep our app on your system to easily mark your location, enable mobile ordering, view incoming orders, post deals & daily specials, promote upcoming events, and use our job posting board...all in one place. And we're constantly adding more features, so you'll want to keep us close!

Square Register

\$799.00
or as low as \$399mo* 

Add to cart

