atVenu

Food & Beverage

Venue User Guide

atVenu

# F&B User Guide
Add Locations

> ℹ️ *It is important to create locations and items before adding events when using the <u>Venue</u> F&B account type. Locations are saved at the account level so they can be easily enabled for all, or only specific events.*
>
> Be sure to configure all Account and Register Settings prior to your event (Tipping, Offline Mode, Discounts, Manager PIN Codes, etc). For more information, please review the articles below:
>
> - <u>Register Settings overview</u>
> - <u>Account Settings overview</u>

Add Locations

- Click on **Venue** > **Locations**
- Before adding locations, first select a location type at the top of the page *(Bar, Food, Other)*
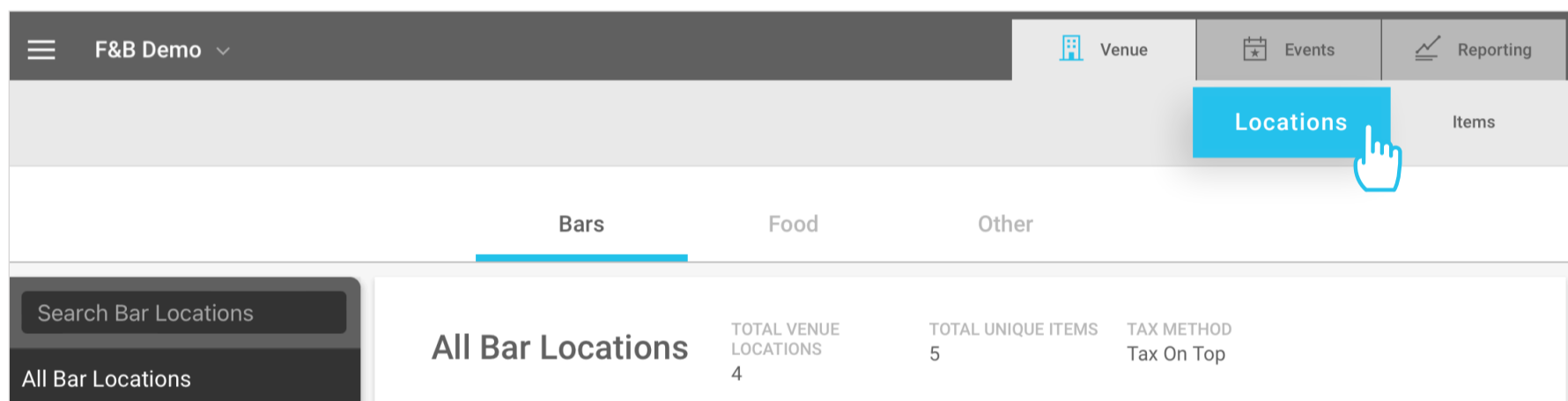
- Click the **Add Bar Location** button from the side bar or from the middle of the screen
- When adding additional locations to an existing event, the **Add Location** button is only available at the bottom of the locations sidebar
- In the slide out panel, enter the location details, including: Location Name (required), Manager Name, Manager Phone, and Manager Email
- Click **Save** or **Save & New** to continue adding locations
- Register log in credentials are automatically generated for each new location
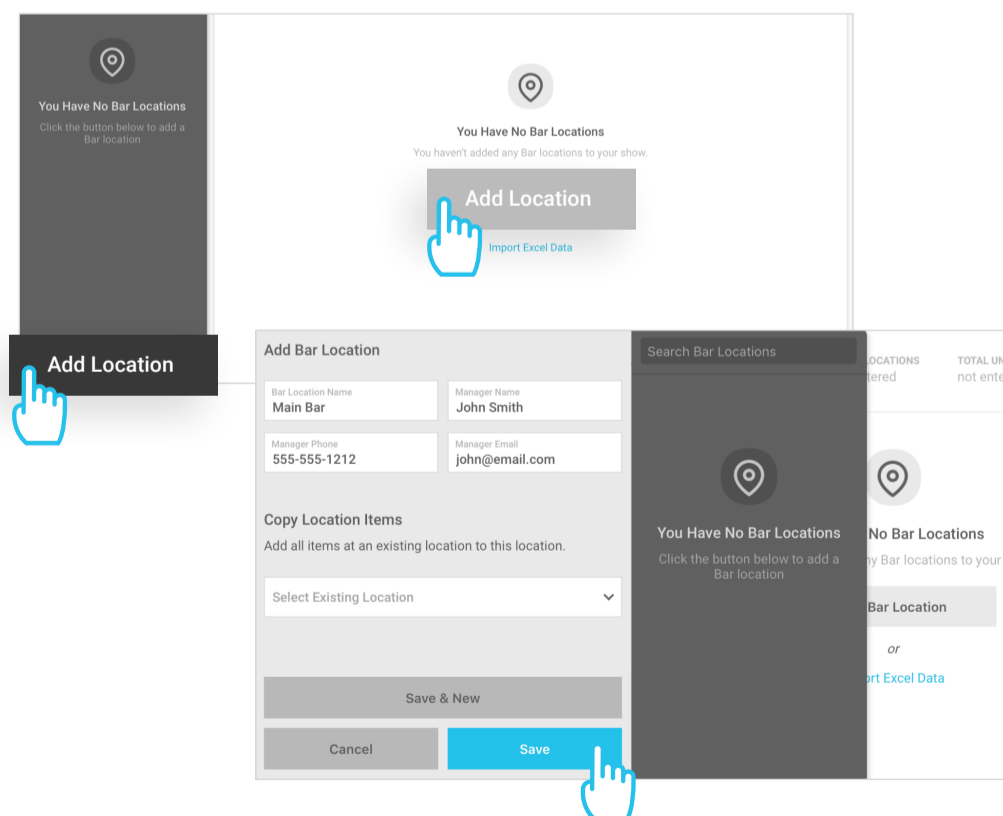
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Add Locations

Quick Tip:

When creating a new location you can easily copy an existing location's item library to your new location for quick menu creation. Select an existing location from the **Copy Location Items** dropdown list to copy all items from that location to the new location.

- Click **All Bar Locations** from the top of the sidebar to view all of your locations
- Click **Tax Method** to change the default tax collection method within Account Settings. You also have the ability to change the tax method at the individual event level
- Edit any location by clicking the **Edit** button in the bottom right of each location tile
- Click the bar name on any location tile or from the sidebar to load the location and its menu items

Please note: *You also have the ability to create event specific locations. See Page 07 of this guide for more information*

ⓘ **Warning: Do not rename or delete any location once you have processed Register sales. This will create issues with Register Report sales data**

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Add Items

Add Items

There are 2 ways to add items. Items can be added at the account level from the **Venue** > **Items** page and then assigned to specific locations, or items can be added directly to locations.

Adding Items from the Items page

- Click **Venue** > **Items**
- Click **Add Item** if no items have been saved, or click **Add Item to Venue** in the bottom right corner of the screen
- When adding items from the **Items** page, locations are not pre-selected

Adding Items from the Locations Page

- Access any location by clicking the bar name on any location tile or from the sidebar
- Click **Add Item** if you have not yet saved any items to the location, or click **Add Item to [Location Name]** in the bottom right corner of the screen
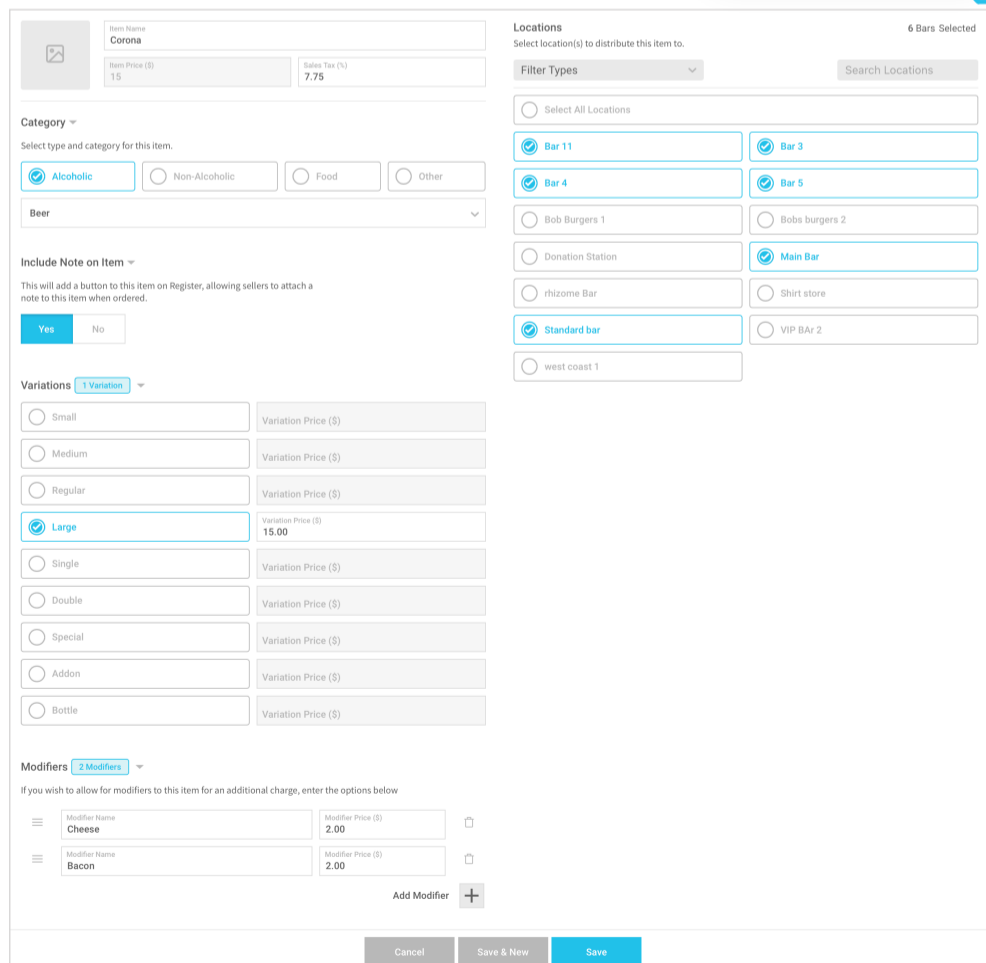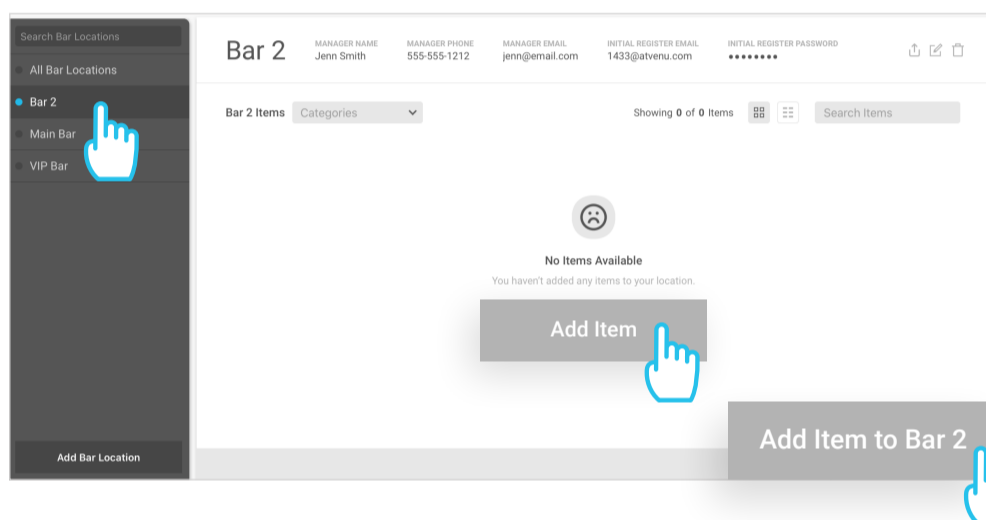
Item Details

- Enter item name and price
- **Categories:** Select item Category (Alcoholic, NA, Food, Other). Then select a sub-Category
- **Tax 2:** If Tax 2 was enabled for specific menu categories, the secondary tax rate field be available and can be edited on a per item basis
- **Item Notes:** Enable Item Notes if you would like the ability to add custom notes to items on the point of sale as you process transactions
- **Variations:** Variations can be used when an item is being sold at multiple price points. Using price variations will override the original item price
- **Modifiers:** Click **+ Add Modifier**, then enter name and price. Use the sort button on the left to change the order in which the modifiers are listed. Click the trashcan to delete
- **Locations:** If the item should be distributed to multiple locations, select additional locations as needed on the right
- Click **Save** or **Save & New** to continue adding items

Add Items at the account level:
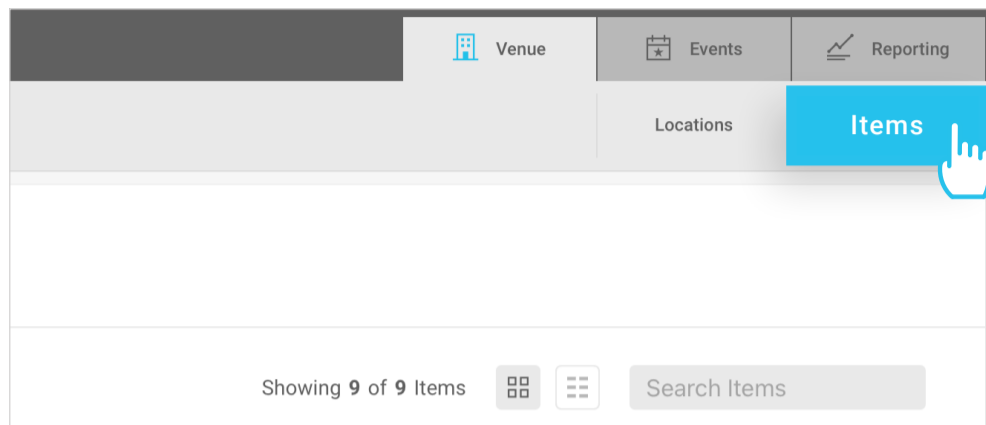
Add Items at the location level:

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Add Items

Add Images

- To add images for your items, click on the image thumbnail to the right of the primary item details

Using Item Notes on atVenu Register

- Select an item that has notes enabled
- Tap **Add Note**
- Enter note, then tap **Done** to save the note
- Tap **Add to Cart**

Using Modifiers on atVenu Register

- Select an item that has modifiers enabled
- Select the modifiers you would like to add to the item
- Tap **Add to Cart**
- To remove a modifier, tap on the item to select it from the cart, then deselect the modifier, then tap **Add to Cart**

Quick Tips:

- Modifiers are listed under the item they apply to on customer receipts and transaction lists
- Modifiers are listed on the **Items** page of the Register Report, nested under the items they apply to
- Modifiers cannot be refunded individually. Only complete items that include modifiers can be refunded

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Edit Items or Sort Items

From a Location Page

- Items can be edited or removed from any location page by hovering over the item
- You can also sort the order of items from any location page by dragging and dropping. This will update the order of the items on atVenu Register for this specific location

From the Items Page

- Items can be edited or deleted from the event by hovering over the item
- Sorting is not available from the Items page. To sort, you need to access the menu from a specific location page

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ⓘ *Do not remove or delete items once you have processed Register sales. This will create issues with Register Report data*

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Add Events

Add Events

- Click on **Events**
- Toggle between list view or calendar view, depending on your preference
- In list view, click the **Add Event** button in the upper right to create a new event
- In calendar view, click on a date, then click **Create New Event**

Event Details

- Select show date, or select date range if the show is a multi-day event
- Enter an **Event Name**
- **Tax Method:** Set Tax Method *(Tax Inclusive or Tax On Top)*
- **Credit Card Descriptor:** The Credit Card Statement Descriptor can be used to change what appears on the Customer's Credit Card Statement, for each individual show. If the descriptor is not set for the show it will default back to the atVenu Account name. Credit Card descriptors are limited to 22 characters
- **Tax 2:** Set a secondary tax rate, and select which categories you would like secondary to apply to, and enter a Tax 2 Description
- **Settlements:** Enable or disable F&B Settlements for the event. Please review our F&B Settlement Guide
- Click **Save Event** or **Save + New** to continue adding new events

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Add Events

Access, Edit, or Copy Events

- To access an event from list view, click on the event tile
- To access an event from calendar view, click on a date, then click on the event
- To edit an event, click **Edit** from either list or calendar view
- Click **Copy** from either list or calendar view to duplicate any event, along with any/all Locations and Items
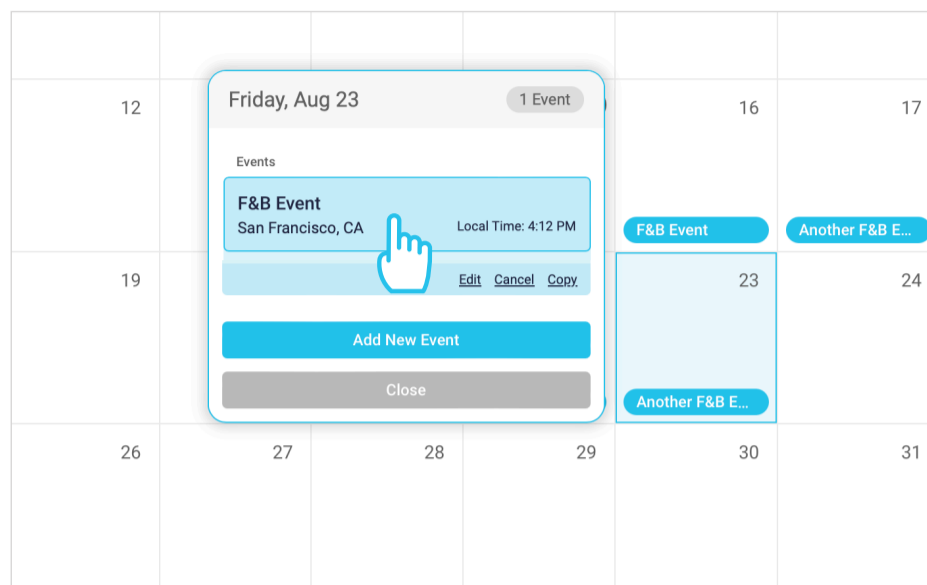
> ℹ️ *Once an event has been created, all locations and items saved at the account level will be enabled, but can be disabled as needed. Event specific locations and items can also be added.*

Event Level Locations or Items

- Once you have accessed, and events, you have the ability to toggle off Locations or Events for that specific event
- You can also add Locations or Events to a specific event
- by clicking **Add Location** or **Add Item to Event**

Add an event specific Location

- When viewing the event, after selecting it from the **Events** page, click **Add Location**. This will create a new location that is available only to this selected event. The tile for the new location will sit under the account level locations

Add an event specific Item

- When viewing the event, after selecting it from the **Events** page, click **Add Item to Event**. This will create a new item that is available only to this selected event. The tile for the new item will sit under the account level items
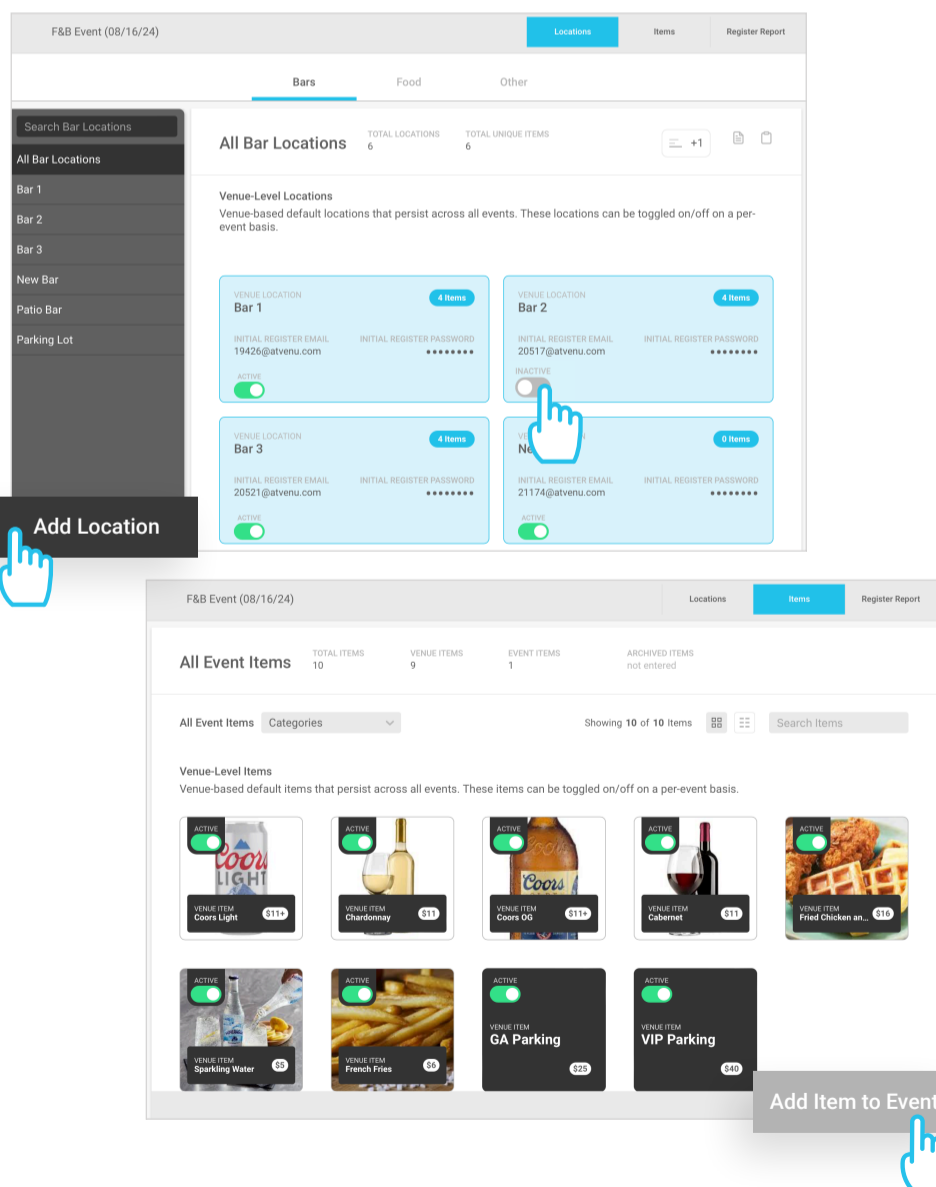

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Share Location Register Report and Login Credentials

### Share <u>Event Specific</u> Location Login Credentials and Register Report Access

atVenu auto-generates a unique POS login for each location. This username and password can be used to log in to the atVenu Register app for that specific location. To share login details for an event specific location:

- Click the **Share** button *(Only available for event specific locations)*
- Select **Sales Report Link** and/or **Register Login Credentials**
- Enter recipient phone, and/or email
- Click **Send**
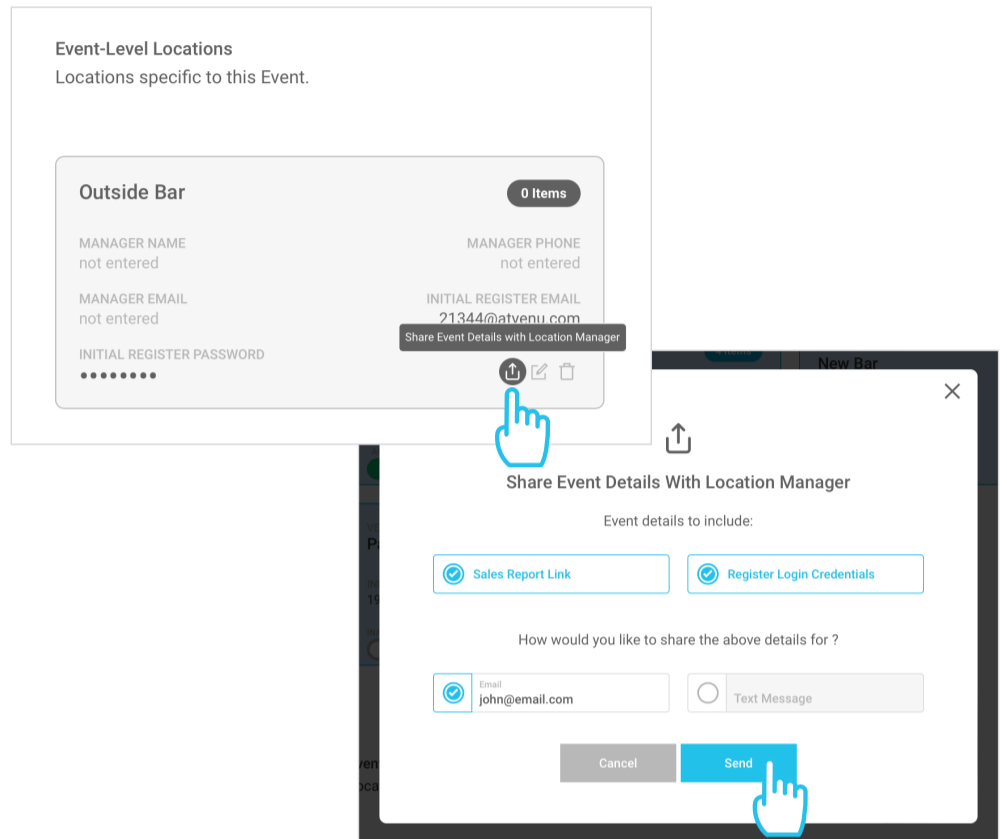
Share <u>All</u> Location Login Credentials

- Click **Events**
- Select an event
- From the **Locations** page, under **Events**, click the **Copy Data to Clipboard** button in the upper right. This allows you to copy all login credentials and then quickly paste them into a shareable Google Sheet, for example
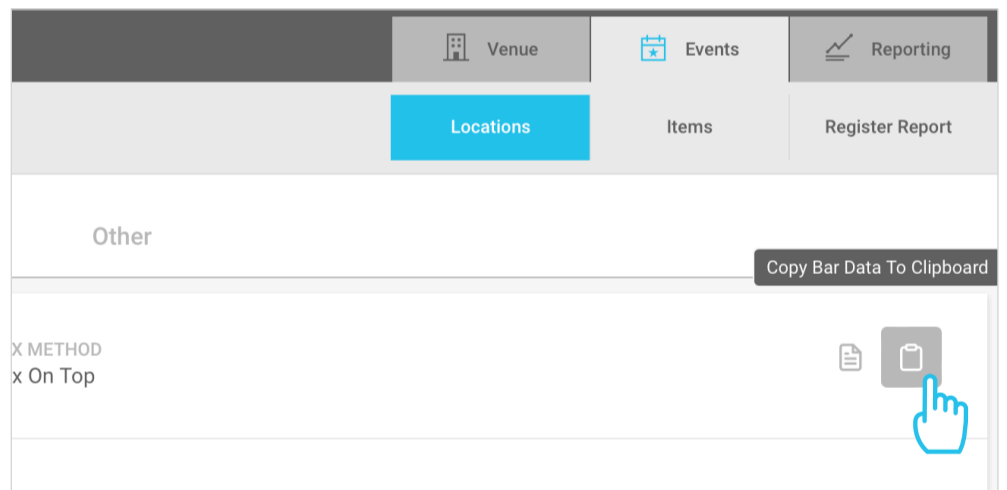
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Location and Menu Import

Location and Menu Import

You also have the ability to import all locations and items to a specific event.

- Once you have accessed an event from the **Events** page select **Locations**
- Click the **Import Excel Data** button in the upper right
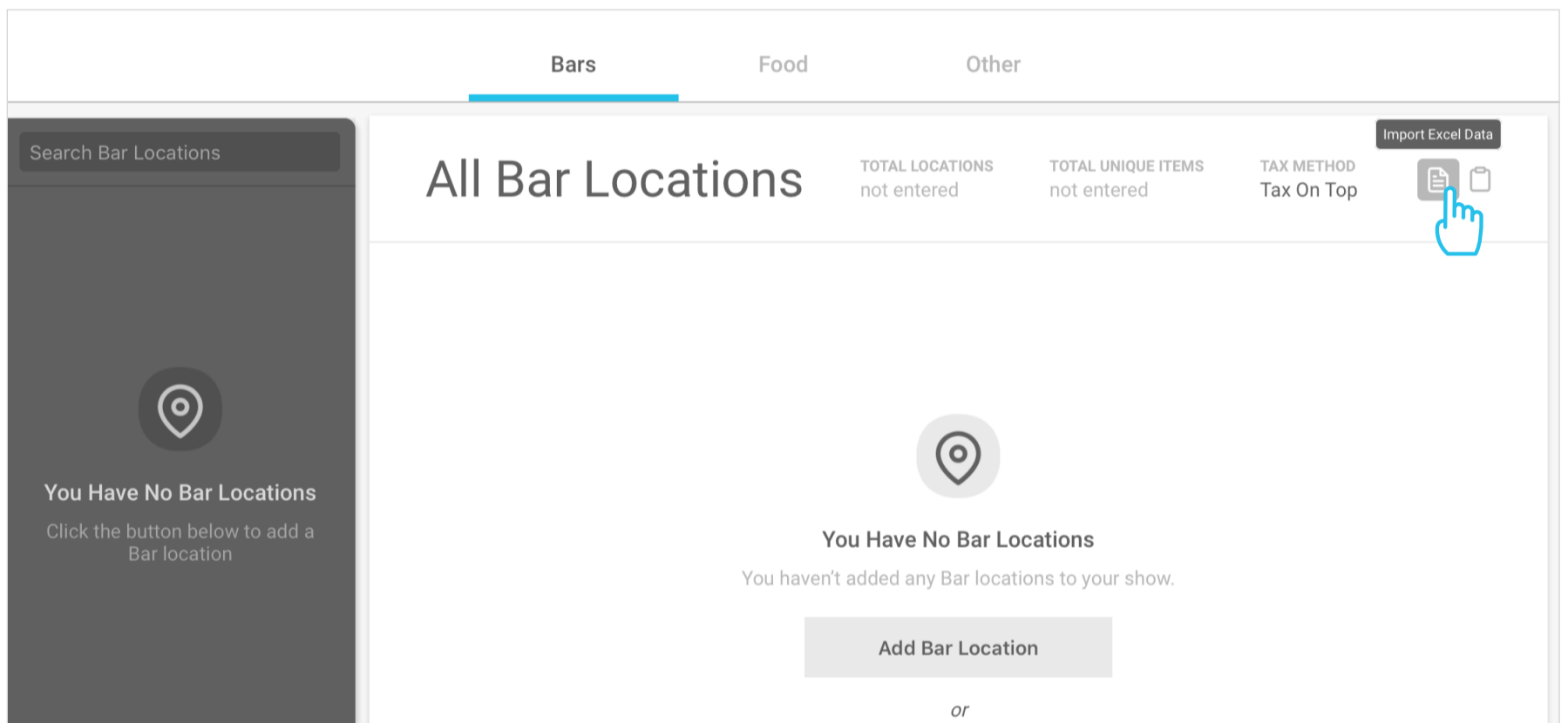
- Download our template file and format your file for import
- When ready to import, click **Upload File**

🟢 *Macros must be enabled in Excel to use the import template. Refer to the first tab of the Excel file for instructions*
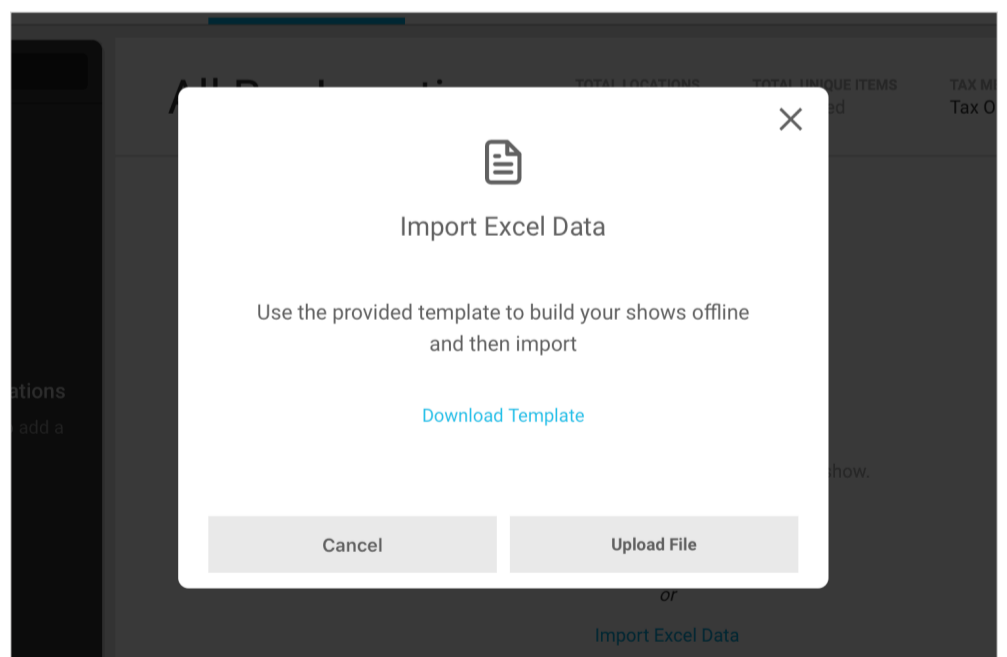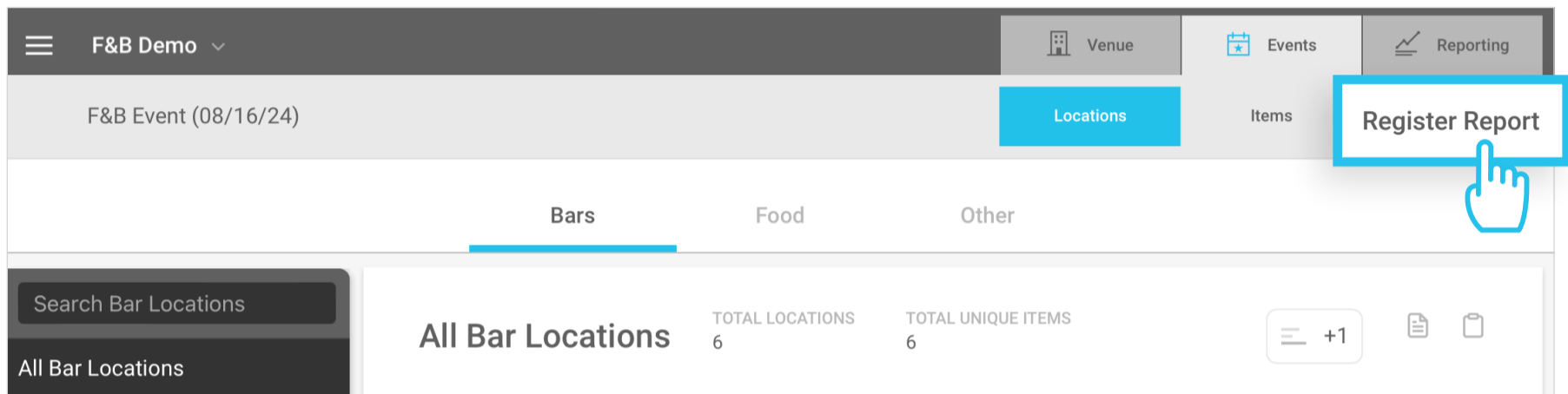
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Register Report

Register Report *(Real-Time Sales Reporting)*

The Register Report is an event specific, real-time sales report. This report includes total tenders, tips (tips by location), total transactions, top selling items, and total items sold across multiple locations. All data is filterable by day, time, and location.

- Access the Register Report for any event by clicking the **Register Report** button from the secondary navigation
- The Register Report can be shared with location managers or food vendors as needed. Share links can be restricted to specific locations

Please Note: The Register Report can also be easily accessed from **Event Reporting**. See next page…

Quick Tips:

For a complete overview of the Register Report, please see: Understanding the atVenu Register Report

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Event Reporting

Event Reporting

Access Event Reporting

- Click **Reporting** in the primary navigation
- The page will default to (or click) **F&B Reports**
- Select an event and report type

Event Overview

- The report will default to **Event Overview** which provides a high level overview of your event:
    - Gross Sales, Net Sales, Tips, and Processing Fees are all displayed in the upper portion of the report
    - Below the graphs, you we provide a more granular breakdown of your event which includes, Refunds, Discounts, Declines, Taxes, Total Collected, Tenders, Fees, Net Total and atVenu Deposit

Location Recap

- The **Location Recap** will provide a detailed breakdown of sales by location with high level graphs up top, and more granular breakouts below for each event location
- Export the report by clicking the **XLS** button

Transactions

- The Transactions report will provide a record of all transactions across the entire event
- Use the filters to configure the report by date, location, tender, etc…
- Search for any transaction using the search field in the upper right
- Export the report by clicking the **XLS** button

- 🟢 *Click the Register Report button in the upper right to load the live POS sales report*

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Thank You!

If you have any further questions or concerns please contact us:

atVenu.com/support   *or*   support@atVenu.com