what the fork
#whatsfortearex

Everything you need to know about your Partner Area
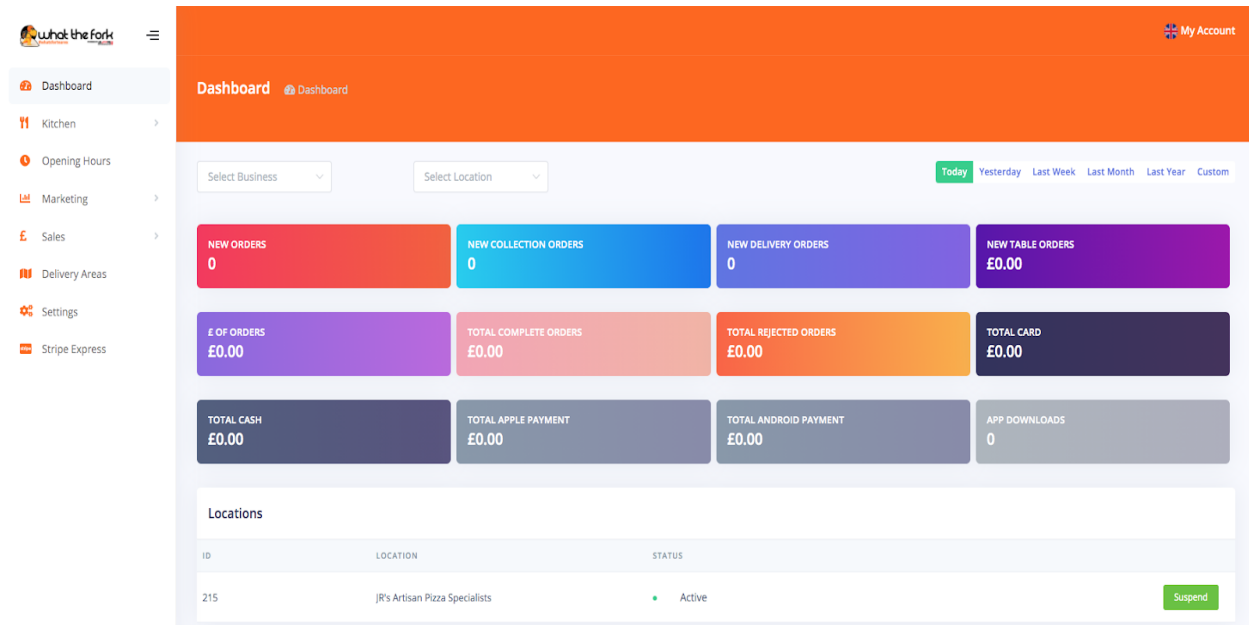
Table of Contents

Partner area overview

The partner area is your basecamp, this is where you can access everything to do with your app, from opening times and menu items to setting delivery zones and creating marketing campaigns. We will initially set up everything you need as you want it but this guide will enable you to make instant changes when you need to.

You are responsible for your own partner area login and will need to access this for a variety of activities. There are 8 options to the left side of the partner area tab.

Dashboard

The dashboard is effectively the homepage for your account and this is where you can see your analytics. Here you get an overview on the amount of sales you have made both in number and price. You can see any new orders that have come in (and at the bottom you can see a breakdown of each order in order of most recent).

You have 8 tabs to the left which all have certain parts to them that you can access.

On the screen you can see your daily sales which you can just see today, yesterday, last week, last month, last year or you can make a custom date to see what your sales were, how many orders, how many people paid by card, cash or even google/apple pay.

You will also see under where it says Location i.e JR's Artisan Pizza Specialists there is a **suspend button.** This button is also seen on your propad. At any time you can press this button and can suspend your app for 15 or 30mins at a time and you can also cancel this. This button can be used when the kitchen is overwhelmed with orders, rather than totally switching off your app and when customers go to order through your app it states the app is currently offline but will return in for example 9 mins so it counts down when you will be back online.

At the very bottom of the screen you will see a section called Latest Orders. This is just a run down of the latest orders that have come through your app, you will get a more detailed run down through the **SALES** tab.

To find out more watch our [Dashboard tutorial](#)

Kitchen

When you press the kitchen tab you will see 3 child categories called **Categories**, **Menu** and **Options.**

1. Categories: This tab is where all your categories will be, i.e Breakfast, Lunch, Drinks. You can edit these at any time, you can add a new category, add any descriptions.
     a. You can always enable or disable a category if you don't want that category to be on your app anymore. If you wish to edit an existing category go to the right hand and click the **green pencil button**. You will now see this screen:
     b. If you ever make any changes to anything in the partner area **always** make sure you press **Save Changes.**
2. Menus: This tab you can search for any menu item, edit and move the item from one category to another. You can disable an item from this dashboard but you can also do this on your machine. You can also change prices for any menu item.

If you click the green pencil edit button, the below screen will appear and you will see more tabs: Menu item, Details, Stock Control, Options, Pricing, Copy/Clone (we do not recommend using this).

Menu Item Tab

1. Name: change the name of the item.
2. Description: add any details about the item here.
3. Is Vatable: we recommend putting every item down as vatable but this can be changed.
4. Category: select or change the category the item will be located in, e.g., Chicken Korma could be placed into Curries.

Details Tab

1. Meal Time: this allows you to edit the time the item is available, e.g., breakfast items could be changed to 7am-11am.
2. Meal Day: similarly to time, an item could be a special for a specific day.
3. Minimum Quantity: this must be at least one, but may vary, for example if you have a deal on or the item must be made for at least two people.
4. Status: either enabled or disabled the item.
5. Priority: this is where you want this item to sit within the category. If the item order is important to you will need to count all the items you have within the category and organise them by numbers eg., 1 to 15.

Stock Control

1. This tab allows you to keep stock, it can subtract the stock from the system so you have an idea how much you have sold and what you have available. This is ideal for items you buy in bulk, for example cans of juice.

Options

1. This tab allows you to add options to your item for example sauces or toppings.
2. If you want to attach a menu option to this item you would need to go to where it says **select option**, a dropdown menu will appear and you can choose what option you want to attach, it will not automatically list all the options however if you select the **auto add option values**, it will automatically list all the options within that option.
3. Select option required, if the customer must choose an option i.e salad or no salad, if you choose for an option to be disabled then the customer does not need to choose one, then click it so it shows as red, i.e Extra Toppings is optional as a customer does not need to pick one.

Pricing

1. Price: the main charge for the item.
2. Allow Delivery/Allow Pick Up/Allow Sit-in: these can be turned on or off.
3. Delivery Price/PickUp Price/SitIn Price: these options allow you to input different prices.
4. Press save after you make any changes.

Copy/Clone

1. This can be used if you have an item that you want to have the exact same settings/price but you are going to change only one section, for example ham and pineapple pizza can be cloned to make a chicken and pineapple pizza.

Options Tab

1. This is where you will create/see options that will be attached to menu items for instance Margherita 9" Pizza needs to have an option for a Base, Sauce and Extra Toppings.
2. To create a new option you would go to the top right and press **New.**

Option Details

1. Name: i.e Salad Options
2. Type: You have to select whether its a radio, checkbox or select box
    a. Radio: select if the customer has to choose one of the two options
    b. Checkbox: select this if there are multiple options available i.e Extra Toppings. This is an optional choice.
    c. Select: select this if the customer must select multiple options, e.g., pick 5 breakfast items in a Munchie Box, the select box can have a long list of items to choose from.
3. Priority: this is where it is placed within the menu item and on the till receipt when printed, so for instance for a pizza you can order it as Base would be 1, sauce 2, extra toppings 3.
4. Status: if you want the option to be live straight away enable this, if you wish to hide the options keep it disabled.

Option Values

1. Option Values: This is where you will input the data as in what items are within that said option i.e The Name will be 9" Extra Toppings, the Option Values will be what extra toppings the client is giving the customer to choose from i.e Bacon, Cheese, Chicken
2. To add an option press the **Green Plus Button.**
3. You can add in an option price. For example £1 per extra topping.

To find out more watch our [Kitchen tutorial](#).

Opening hours

You can individually edit opening hours, delivery hours, pick up hours and table ordering hours.

1. If you wish to change your opening hours, pres on **Edit Opening Hours**
2. Daily: If you are open the same time every single day you could choose this option
3. Flexible: select flexible if you open/close at different times.
4. If you have to close your app for any reason make sure the changes you make are replicated on all options. Make sure to press **save changes** and ensure you go back in and edit the hours the following day/week.

To find out more watch our [Opening Hours tutorial.](#)

Marketing

When you click the marketing tab you will see a further two options: Coupons & Notifications (in apps).

Coupons

Coupons allow you to provide discounts to individuals or everyone on the app, this can be for a percentage or set amount.

Go Cheesy On Me	gocheesyonme	Percentage	20.00	•	✎ 🗑
Halloween 20% OFF	slicestreet20	Percentage	20.00	•	✎ 🗑
25% off and Free Doughnuts! Code: DOH26	DOH26	Percentage	25.00	•	✎ 🗑
Alex 35% Apology	Sorry35	Percentage	35.00	•	✎ 🗑

1. Name: provide a name for the discount, e.g., 10% off First Order, (this is shown on the the app so just summarise what the coupon is for).
2. Code: Keep the code simple e.g., WTF10 - 10% off through What The Fork
3. Type: You can either choose a fixed amount or percentage, percentages tend to be a lot easier.
4. Discount: this will be exactly how much you are wishing to give off the orders
5. Redemptions: this allows you to control how many people redeem the code, it can be used when you promote limited offers, for example 30% off the next 30 orders
6. Customer Redemptions: this controls how many times an individual customer can redeem a code, so for example if the offer is for 10% off customers first order, you would set this to 1.

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7. Minimum Total: this can be used if you have a minimum spend on the offer, for example 20% off orders over £40
8. Validity: You can either choose from: Forever, Fixed, Period, Recurring.
   a. Forever: until it is disabled.
   b. Fixed : for a single day, for example a Black Friday offer.
   c. Period: offer with a start and end date, for example a weekend, week or month.
   d. Recurring: an offer which recurs on a specific day each week.
9. Fixed Time: this allows you to add specific time restrictions, for example happy hour.
10. Order Restriction: this allows you to restrict the discount code to the type of order, i.e., delivery, collection or sit in.
11. Exclude Menu Categories/Menu Items: these options allow you to exclude any menu items or categories from being included in the discount offer, e.g., specials or drinks.
12. Description: the coupon needs a description so when it is shown on the app the customer knows what the offer is, for example Get 10% off your first order through our app or What The Fork
13. Status: this allows you to turn the coupon on and off.
14. Coupon Automatic: if switched on this will apply the coupon automatically at the checkout, however this only works with unlimited redemptions.
15. Private Coupon: if selected this option will allow you to hide the discount code. This can be used for complaints, employee discounts, family and friends discounts etc.
16. Attach to Location: this is only relevant if you have multiple locations integrated into the same app, as it allows you to select which stores the coupon is valid at.

Notifications

Notifications allow you to send messages to every single customer that has downloaded your app and opt-ed in to receive notifications. This means that you can prompt previous customers to order from your app.

1. To create a new notification go to the top right corner and press **New**. The page will then show three options:
   a. Subject: i.e Tuesday Night Treats with Pentland Sweets
   b. Body: Order your after dinner treats from Pentlands Sweets via our app and use discount code: sweetiepie00

c. In Draft: If you would like to put your in app notification into draft for future days or wish to edit them another time then keep this as yes. If you want to send immediately then change this to no and the top right button will change from save changes to send!

Example notifications
1. Treat yourself this Black Friday🖤 and get 20% off today with code BLACKFRIDAY2🍕🍔
2. Avoid the cold weather🌨, get your food delivered right to your door!🥙🌮
3. No Monday Blues here😜, get 25% off your order with code MONDAY25🧁🍫

To find out more watch our Marketing tutorial.

Sales (Orders)

This screen will list every single sale you will have had through the app since you first joined us.

If you want to view any order you just go to the right of the order you wish to view and press the eye symbol. This page will show you everything from the end customers details, any commission (if any) taken from the order, to what menu items were ordered.

To find out more watch our Sales tutorial.

Delivery Areas

The delivery areas are a vital part of your app. For delivery areas you have information you must fill in:
1. Delivery zones: You can create as many delivery zones as you want., which are either circles or shapes.
2. Cost: This will be the cost of the delivery per order, for example £3.
3. Condition: will always say on top of order total above.
4. Order Total: this allows you to set a minimum spend for delivery to be available, for example £10, this would be entered as 10.00, if you do not wish to have a minimum spend you must input this as 1 pence, which would be entered as 0.01.
5. Add New Area: If you have multiple areas that need to be put onto the app you just click the blue button that says **Add New Area.** It will then add another circle so you will just need to input the data.

To find out more watch our Delivery Areas tutorial.

Settings

When you click settings you will see three tabs at the very top: Settings Details, Location Table (you only use this for table ordering) and Service Charges.

Update Order Setting

1. Last Order Time: This is when the app will stop taking orders. So if you wish to close at 10pm, you would input when you will accept your last order, for example 9.30pm. However, this is entirely up to you and you can accept orders until closing.

Delivery

1. Offer Delivery: If you offer delivery, make sure this button is turned on to say yes.
2. Today's Delivery Time (in minutes): this is usually between 40 and 60 minutes, but you can make changes at any time if you are busier than usual.

Collection

1. Offer Collection: If you offer collection, make sure this button is turned on to say yes.
2. Today's Collection Time: this is usually between 20-40 minutes, but you can make changes at any time if you are busier than usual.

Table Ordering

1. Offer Table Ordering: If you offer table ordering, make sure this button is turned on to say yes.
2. Today's Table Ordering Time: set this to the number of minutes you require, changes can be made when required.

Future Orders

3. When a client signs up you can decide whether you will accept future orders, if yes this should be switched on..
4. If you wish to have future ordering turned on then you can decide how far in advance customers can order for example 1 hour to 168 hours in advance (7 days) .
5. You can also change how far in advance customers can order depending on the type of order, i.e., collection or delivery.

Service Charges Tab

1. Service Charge: This is an optional choice for you. Service charges can be set to different amounts for different services, for example 50p for collect, £1 for delivery, £3 for table services. You will keep 100% of the service charge.

To find out more watch our [Settings tutorial.](#)