

The screenshot displays the OLO dashboard for Krispy Krunchy Chicken. At the top, it shows 'KRISPY KRUNCHY CHICKEN: 1 ORDERS CLOSED' (Last 30 days), '\$0 SALES' (Last 30 days), and '\$0.00 AVG TICKET' (Last 30 days). Below this, there are tabs for 'Open Orders', 'Offline Stores', 'Disabled Stores', and 'Orders Placed'. The main content area shows '0 Open Orders' and a table with columns: ORDER ID, STORE NAME, HANDOFF, TIME PLACED, CUSTOMER NAME, TOTAL, and TIME WANTED. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A sidebar on the left contains navigation options: Home, Menu, Settings, Rails, Orders, Billing, and Reports.

### Contents:

- Dashboard Introduction
- Interactive Guide
- Order Lookup & Details
- Enable/Disable your Store for Online Ordering
- 86'ing Menu Items

### FAQ:

- Q: How do I log into Olo?
- Q: What if I forget my password?
- Q: How do we 86 items if we run out of product or are unable to serve?
- Q: Who processes the order refund for a Marketplace (aka Rails) order?
- Q: How do I turn off a store if there is an issue with online ordering?

### Having Issues with Olo?

5&5 Help team: [delivery@krispykrunchy.com](mailto:delivery@krispykrunchy.com)

5&5 Emergency Phone Support: 469-945-5505

Olo Help Team: [help@olo.com](mailto:help@olo.com)

## Operational Excellence

### Dashboard Introduction

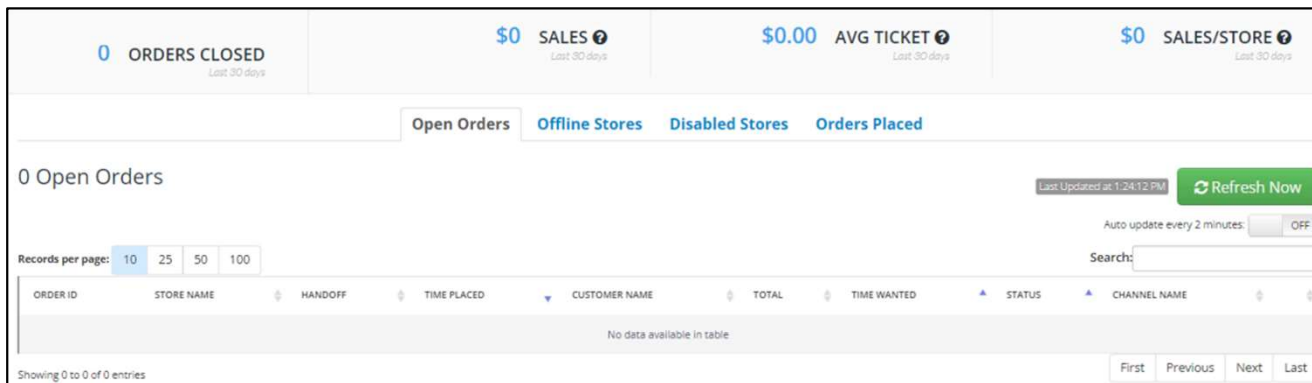
Olo Dashboard is a tool that gives sales insight and supports action required for online transactions. The sections in this guide offer information for each of the navigation tabs, with links to provide additional detail.

Whenever you log into Dashboard, you will be presented with a snapshot of your store(s) performance over the past 30 days. This includes the total number of:

- Orders Closed. Orders place by a customer where the pickup/delivery time is in the past
- Total sales
- Average ticket size
- Average sales per store

The Dashboard home page shows four tabs in the middle of the screen:

- Open Orders
- Offline Orders
- Disables Stores
- Orders Placed



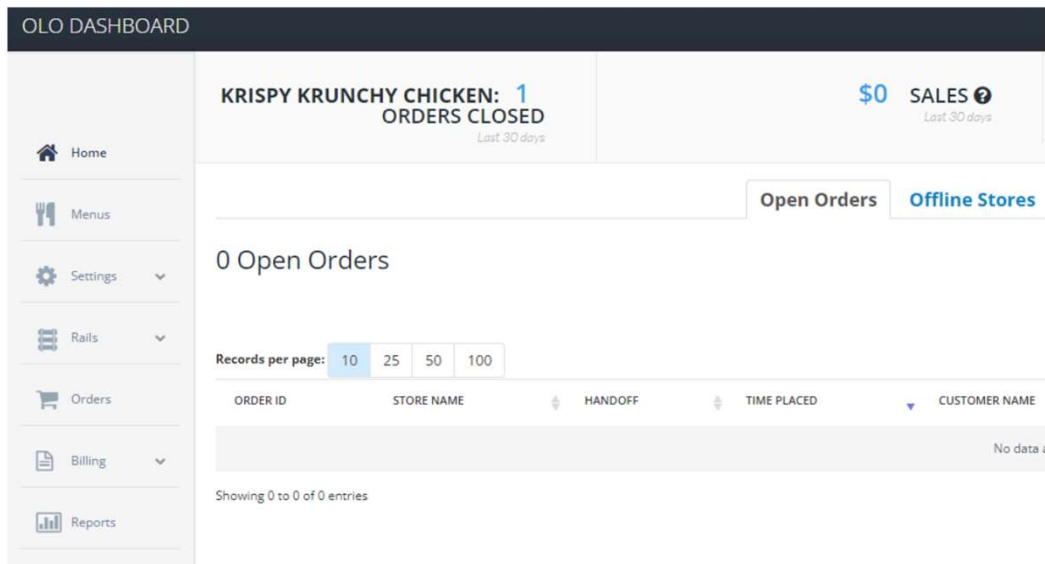
The screenshot shows the OLO Dashboard home page. At the top, there are four summary cards: "0 ORDERS CLOSED Last 30 days", "\$0 SALES Last 30 days", "\$0.00 AVG TICKET Last 30 days", and "\$0 SALES/STORE Last 30 days". Below these are four navigation tabs: "Open Orders", "Offline Stores", "Disabled Stores", and "Orders Placed". The "Open Orders" tab is selected, showing "0 Open Orders". A green "Refresh Now" button is visible, along with a toggle for "Auto update every 2 minutes" set to "OFF". A search bar and "Records per page" dropdown (set to 10) are also present. Below the search bar is a table with columns: ORDER ID, STORE NAME, HANDOFF, TIME PLACED, CUSTOMER NAME, TOTAL, TIME WANTED, STATUS, and CHANNEL NAME. The table is currently empty, displaying "No data available in table". At the bottom left, it says "Showing 0 to 0 of 0 entries". At the bottom right, there are navigation buttons: "First", "Previous", "Next", and "Last".

The toggle "Auto update every 2 minutes" can be found under the green "Refresh Now" button. If toggled to yes, the Open Orders tab will automatically refresh every 2 minutes to show the latest open orders.

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### Dashboard Navigation

The dashboard's navigation bar has several categories. Below you can find details on each tab.



The screenshot shows the OLO Dashboard interface. On the left is a navigation sidebar with tabs: Home, Menus, Settings, Rails, Orders, Billing, and Reports. The main content area displays a summary card for 'KRISPY KRUNCHY CHICKEN: 1 ORDERS CLOSED' (Last 30 days) and '\$0 SALES' (Last 30 days). Below this are buttons for 'Open Orders' and 'Offline Stores'. The 'Open Orders' section shows '0 Open Orders' and a table with columns: ORDER ID, STORE NAME, HANDOFF, TIME PLACED, and CUSTOMER NAME. The table is currently empty, showing 'No data'. Below the table, it says 'Showing 0 to 0 of 0 entries'.

**Menu** - Manage item availability (86ing) on the online menu for your store(s)

**Settings** - Visit the Settings tab to adjust your store settings.

- Disable/Enable Store for Online Ordering (found under Settings) There may be times where you need to disable your online ordering to prevent further online orders from being accepted. You can use this feature to disable and re-enable your store(s).
- Lead Time Extension Settings - Add additional time to prepare orders

**Rails** - View Third Party Delivery Partner sales and errors to help optimize your operations.

**Orders** - Offers a quick snapshot of open orders to provide insight into upcoming scheduled orders. The Orders tab allows you to look up specific past, current or future orders based on a number of criteria, including time frame and order type. Refer to Order Lookup & Details

**Billing** - View invoices and update banking information.

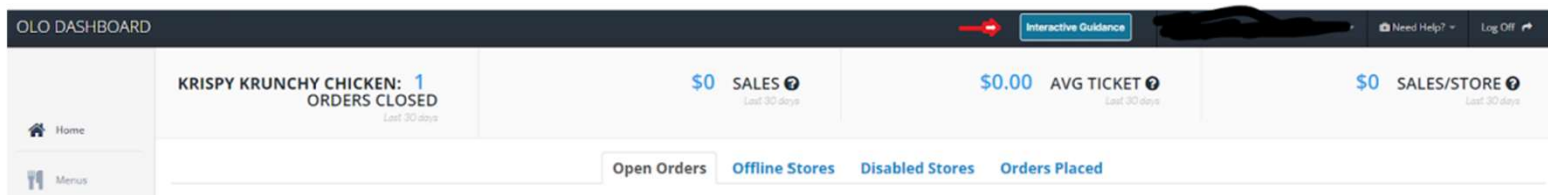
**Reports** - Provides access to a number of reports for your store(s).

## Operational Excellence

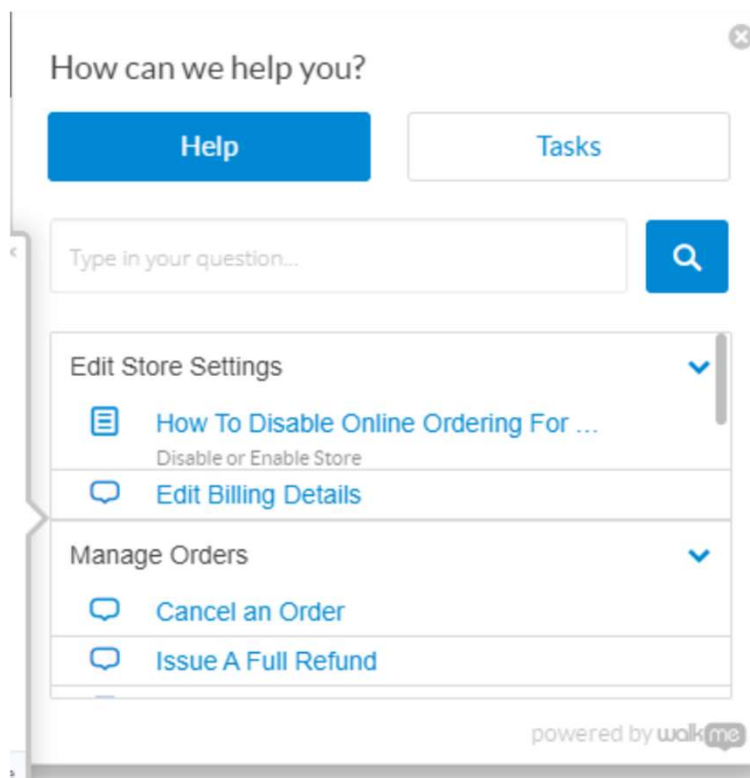
### Interactive Guide

The Olo Dashboard has an Interactive Guide feature, which is a great tool to use if you forget how to complete a dashboard task.

Olo's Interactive Guidance can be found at the very top of the dashboard page:



After clicking on "Interactive Guidance," a popup will present a list of features to choose from:



### Interactive Guide Continued

Once a feature is selected, the dashboard will present step-by-step popups directly on the dashboard with direction for each step. Examples are below:

**Select an order from below**

You can adjust the number of records shown by clicking a number on the left. You can also search for specific orders with the search bar on the right.

When you see your desired order, click its **Order ID**.

It's important to remember, you can only cancel an order when it's status is 'Scheduled'. However, you can still generate a partial or full refund once the order is 'Closed'.

By WalkMe

**Click Orders**

By WalkMe

**Confirm Store**

**Click Expand all**

Next you'll select the stores to include in your report.

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### Order Lookup & Details

Follow the instructions below to view your past, current, and future order details in addition to issuing refunds and adjusting store sales:

1. Log in to the Dashboard at <https://my.olo.com/>
2. Click on the “Orders” tab on the left side of the screen:



3. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right-hand section and click on “Confirm Store Selection”
4. You can look up your orders several different ways. Below is guidance on three of the most popular methods to find an order:

**Method #1- Lookup by Order ID:** use this option if you already know the order number. Type in the Order ID and click “ See Matching Orders”

Orders [Need Guidance?](#)

[Lookup by Order ID](#) [Lookup by Guest Information](#) [Lookup by POS Reference](#) [Lookup by 3rd Party Reference](#) [Search by T](#)

Order ID Search

Enter an order ID number into either of the fields below to search for matching orders. To search for a group order, only use the Full Order ID field.

Full Order ID:

OR

Last 6 Digits:

[See Matching Orders](#)

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### Order Lookup & Details Continued

**Method #2- Search by time frame:** This option allows you to look for your order based on the time it was placed or the time it's wanted, and then set by the date range by order type: Delivery (marketplace), Dispatch (branded delivery), Drive-thru, or Pickup; and order status (in progress, scheduled, closed or cancelled)

The screenshot shows the 'Orders' dashboard with a navigation bar containing: 'Lookup by Order ID', 'Lookup by Guest Information', 'Lookup by POS Reference', 'Lookup by 3rd Party Reference', 'Search by Time Frame', and 'Search by Transaction'. The 'Search by Time Frame' section includes a 'Time Placed' dropdown set to 'Jan 24, 2022 - Jan 24, 2022' and a 'Drilldown Filters' menu with options: 'Today', 'Yesterday', 'Last 7 Days', 'This Month', 'Last Month', and 'Custom Range'. Below this are fields for 'Order Type: All', 'Order Status', and 'Rails Orders Only' with a 'See Orders' button. The 'Search by Transaction' section includes fields for 'Transaction Date' (01/24/2022), 'Last 4 Digits of Card' (Last 4 of Credit Card), and 'Order Total' (\$ 0.00), with a 'See Matching Orders' button. A second inset shows the 'Drilldown Filters' menu for 'Order Type' with options: 'All', 'Curbside Pickup', 'Delivery', 'Dine In', 'Dispatch', 'Drive-thru', and 'Pickup'.

**Method #3-Search by Transaction:** For this option, you will need the exact transaction date, the last 4 digits of the credit card number, and the order total

The screenshot shows the 'Orders' dashboard with the 'Search by Transaction' section active. It features three input fields: 'Transaction Date' (01/24/2022, marked as required), 'Last 4 Digits of Card' (Last 4 of Credit Card), and 'Order Total' (\$ 0.00). A 'See Matching Orders' button is located at the bottom of the form.

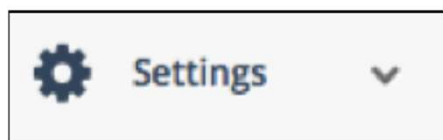


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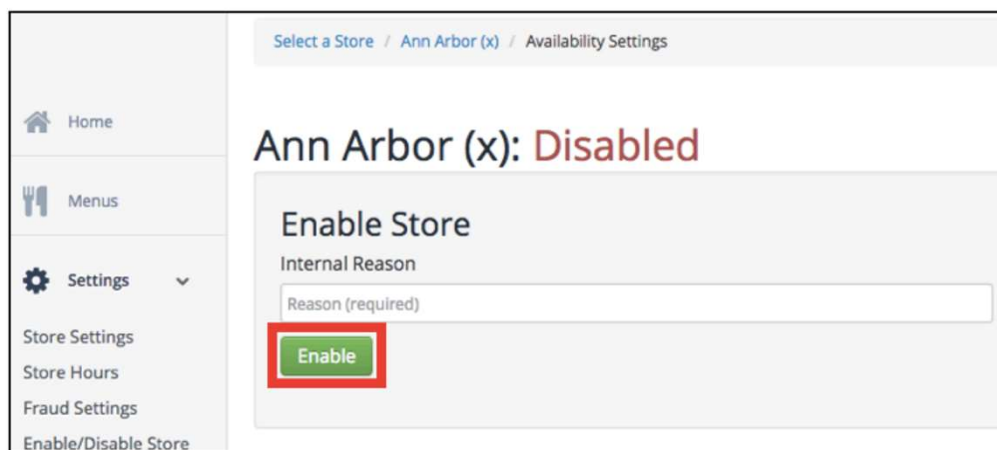
### Enable/ Disable your Store for Online Ordering

There may be times where you need to disable your online ordering to prevent further online orders from being accepted. Use this feature in the event of an unexpected closing. Through the Dashboard, you can easily disable (and re-enable) your location.

1. Login to the Dashboard at <https://my.olo.com/>
2. Click on the “Settings” tab on the left side of the screen:



3. Click on “Enable/Disable Store”
4. Once you click the “Enable/Disable Store” link, you may be prompted to select a store if you have access to more than one location through your dashboard. If so”, choose the store from the right-hand section and click on “Confirm Store Selection” (you can only do this one store at a time)
5. If your store is currently disabled, you will see “Disabled” next to your store name. The system will give you the ability to enable your store at this point. Type in the Internal Reason for enabling your store. This will not be viewable by customers but keeps a log so that you can keep track of who is enabling/disabling your store and why



6. Click “Enable.” Tip: you will be able to track who disabled/enabled the store, the exact time when it happened and the reason why.



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### 86'ing Menu Items

If a store needs to 86 a menu item, follow the steps outlined below:

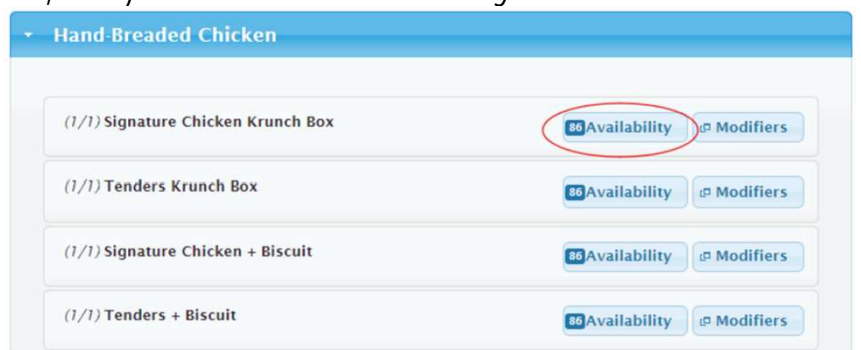
1. Login to the Dashboard at <https://my.olo.com>

2. Click on the “Menus” tab on the left side of the screen:



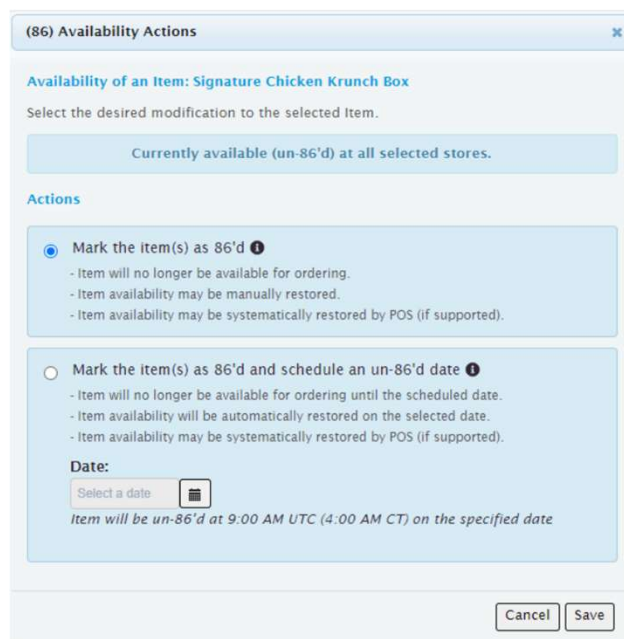
3. Select the Store Menu needing items 86'd

4. Click on the Menu Category (Hand-Breaded Chicken, Wings, Sandwiches & More, etc.) and select the item you would like to 86. Click “86 Availability”



5. Under “Actions”, choose how you want to 86 the item and click “Save”

- Set item to be unavailable (86'd)- select this if you do not know when the product will be back in stock (i.e. the next day or on a specific date)
- Set item to be unavailable (86'd) and schedule a restore (un-86)- This option allows you to not have to go back and restore the item at a later point manually.
  - Select the date the item should be restored. Click “Save.” Note: if you set an item to be unavailable without scheduling a restore date you will need to manually un-86 the item once it's needed



## Operational Excellence

### FAQ

#### Q. How do I log into Olo?

A. Go to <https://my.olo.com>, enter in your Username (email) and password to sign in

#### Q. What if I forget my password?

A. Go to <https://my.olo.com> and click “Forgot Password.” Once an account is created, we do not have a way of resetting your password. It has to be done by Olo for security reasons.

#### Q. How do we 86 items if we run out of a product or are unable to serve?

A. Please 86 the item in the POS as you normally do and for Olo, please go to “Menu” > “Store Menu” > Select Location > Find the Item/Modifier that is unavailable > select the “86 Availability Button”

#### Q. Who process the order refund for a Marketplace (aka Rails) order?

A. The customer needs to process the refund directly through the third-party platform that they ordered from, including Grubhub, DoorDash and Uber Eats. You are not able to refund Marketplace Orders through Olo.

#### Q. How do I turn off a store if there is an issue with online ordering?

A. You can simply disable the store by going to “Store” > “Enable/Disable” and selecting “Disable”. When you select “Disable”, you’ll need to enter an internal reason. Remember that when you do this, your location is effectively and immediately off online ordering. You will need to re-enable your location, by clicking “Enable” when your location is ready to accept online orders again.