fimble

Guide

Last update: 21 June 2024

Table of contents

Intro

For those who are using our fimble software, we welcome you to our “world”. We hope that fimble is adding great value to running your business. Online consumer channels are driving sales, attracting new clients, creating a loyal base and above all giving your clients the best experience online in association with your brand.

Yes, this tutorial is long and detailed, we know it! What would one expect from a robust online ordering system like ours! It is designed though to help you navigate to what you need to review or better understand. If you do not find what you are looking for, or have any recommendation on how to improve it, then please reach out to us by sending an email to support@fimble.io and share your thoughts.

Getting Started with Fimble

With Fimble you can start selling food online through your own restaurant website in just few minutes. Use the steps below so that your customers can easily order online, and you can easily manage your orders.

Log into Fimble Administration Platform

Admin account url -> https://www.yourdomain.com/admin/

Initial username / password to log into system is provided by Fimble to the system admin. Thereafter the system admin will create and provide credentials to team members. Fill in the respective fields, press enter and / or click on the Arrow to log in.

Login in Window

When the fimble account is set up, the designated “Super Admin” will receive the sign-in credentials. This user holds the “keys” to the system will create the user levels and provide the log in credentials for those that will have access to the admin as well as the fimble portal.

Thereafter, the super admin and / or assigned users will need to perform some basic set up tasks to prepare the system accordingly. In the following section are the key set up tasks that need to be implemented.

Once you have logged in, user will notice 2 static elements:

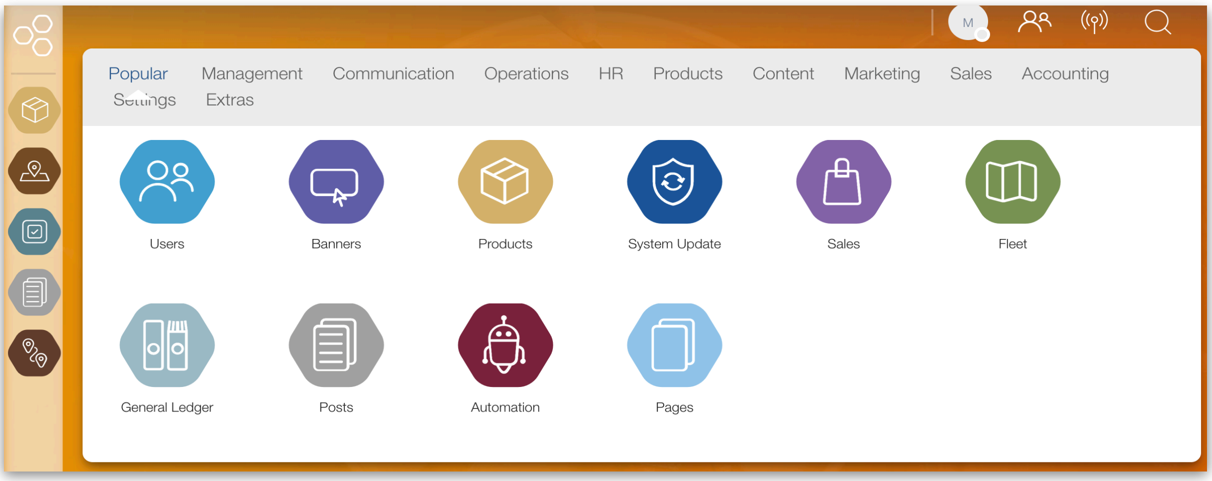
The Application bar on the left.

The Tool bar top right.

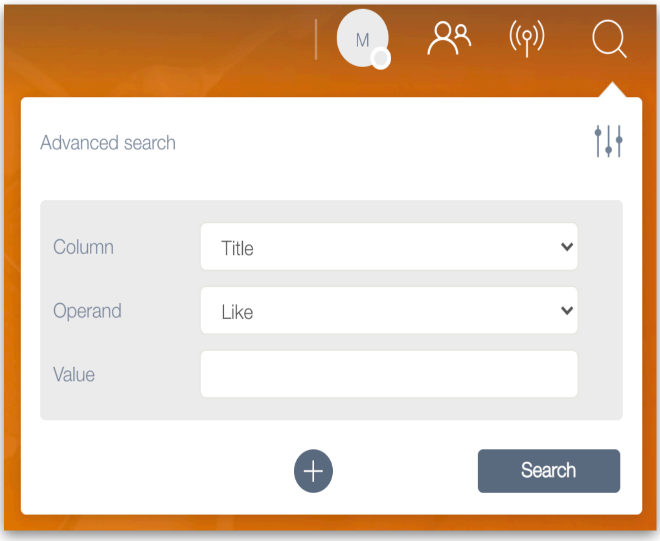
Application bar

From the application bar, user can launch the dashboard. Clicking on this icon, all the apps that they have been given access to will populate.

Once you open the dashboard, you have the respective user level access to applications broken down by most popular and / or by major categories. User can also "dock" specific apps to the application bar by dragging them from the application launch bar to the application bar.



Tool bar



This tool bar contains your profile and search function with advanced search option capability.

Search and launch apps ability.

When an app is opened you can search within the the app in greater depth.

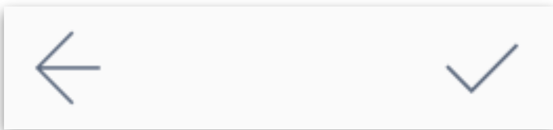
Creating a New Record & Basic Apps functionality

Most apps share a common structure and logic. Once you open an app, user can a) create a new record and b) carry out certain actions for the record. These actions can be found in the upper right section of the opened app.

Tags: The first icon is tags. Tags are set up in the tags app. You can create tags, assign them to apps and records. Tags are searchable within the system.

Gear: Gear opens and gives user options like Delete, Print, and Export among others.

New Record: "+" opens a new form to create a new record.



After creating a new record, to **SAVE** the record click the **CHECK** mark. To close without saving, click the Arrow.

Edit a Record

For all the records you have created, you also have the ability to Edit them as well as conduct a number of other actions through the Gear and Media button as described above.

- **Edit a Record** – To edit a record, open the record, edit the content and then click the check mark to save.

Other Actions that can take place while Creating and/or Editing a Record

For further actions within the record go the the Gear. Click on the gear and you have the following options:

- **Save & New** – By clicking on this option, you save the current record you are working on and a new record with no content is opened for you to continue to create a new record.

- **Save & Copy** – By clicking on this option, you save the current record and open a new copy of the current record you are working on to continue with this as a template.

- **Apply Changes** – By clicking on this option, saves the record, without closing it.

- **Share Link** – By clicking on this option, you generate a link of the record in order to share it with someone.

- **Print** – By clicking on this option, you open the print function in order to print the content of that record.

- **Versioning** – By clicking on this option, you have the ability to see all the saved versions of the record and you can revert back to an older one.

You also have the ability to go to the **Media** tab next to the **Gear**, then click on the Media file button which will open the **File Manager** and from there you can select to drag the media into the record.

Create your Restaurant's Online Menu

Add your menu which consists of product categories, products, sizes, specs, raw materials, and special price lists.

See how to create you online menu

Manage your Website's Content

Discover how to manage the content you publish on your restaurant website.

See how to manage the content for your restaurant's website

Set up Restaurant Address and Contact Data

Complete the basic information about the restaurant, such as the address, phone number, email address, etc. Thanks to this, customers will have easier contact with your restaurant.

See how to set up your restaurant's address & contact data

Set up Working and Delivery Hours

Define restaurant working and delivery hours per day, taking into account the types of order fulfillment.

See how to configure working & delivery hours

Start Receiving Orders

You can receive online orders using any web browser or the fimble exclusive mobile app.

See how to receive online orders

Set up more elements

- **Set up users & give permissions**

  See how to set up users & give permissions

- **Draw your specific delivery zones**

  See how to add your delivery zones

- **Configure order types**

  See how to configure order types

- **Set up kitchen display**

  See how to set up kitchen display

- **Set up printing options**

  See how to set up printing options

- **Set up tags**

  See how to set up tags in products / See how to set up tags in banners (gallery page)

Remember about the marketing of your restaurant

- **Set up offers & coupons**

  See how to set up offers & coupons

- **Set up loyalty program**

  See how to set up a loyalty program

- **Set up gifts**

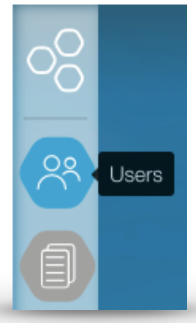
  See how to set up gifts

Users & Permissions

User Account Management (Users app)

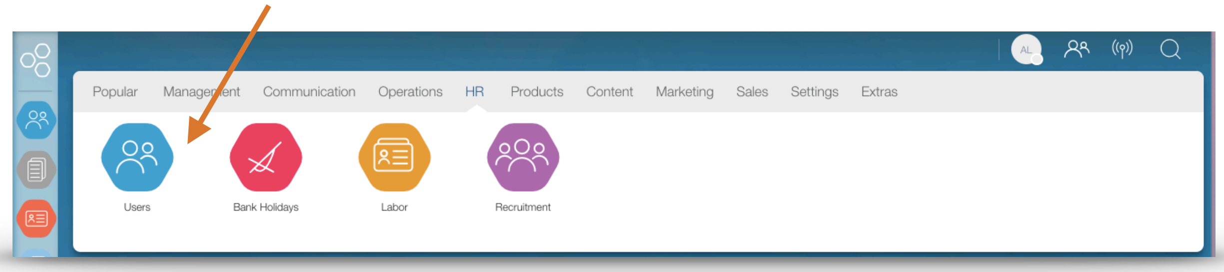
In Fimble, you can create any number of user accounts with different permissions to efficiently handle the online ordering system. As an account administrator, you can add another user at any time, granting them selected permissions adjusted to the function performed.

Creating / Editing User Access Levels

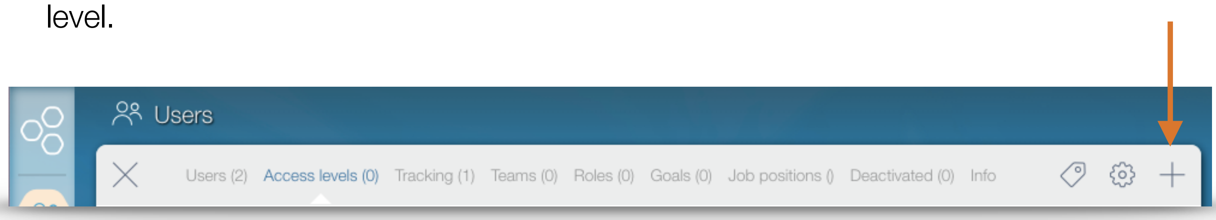


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Users app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **HR Category** where you will find the **Users app** inside.



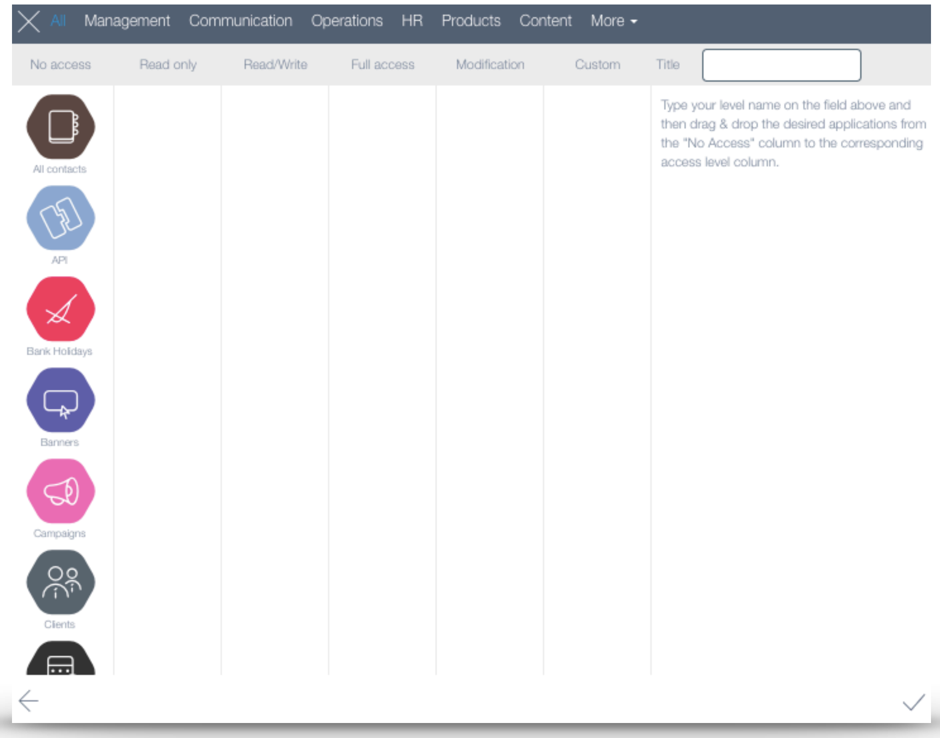
3. Launch the **Users app,** select the **Access Levels tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the new access level.



4. You should fill in, among others the following sections:

You should define **Title** of the access level (eg. Cashiers, Waiters, Drivers, etc.) so that you are able to distinguish them. Each category consists of all the applications of the management platform that your administrator account has been granted access to and of 5 columns that reflect a series of "user rights" that each user may be assigned. To move an application into a column, simply drag it to the desired column.

<u>Access Levels</u>



- **No Access** – In this column you find all the applications which the user who possesses the specific access level has absolutely, no access at all.

- **Read Only** – In this column you find all the applications which the user who possesses the specific access level can only open a record, eg. a product or a sale, see all the information they need and do a series of actions (such as exporting to some file types) without being able to a) edit it, b) add a new log, c) delete a log.

- **Read / Write** – In this column you find all the applications which the user who possesses the specific access level can edit or create a log (eg. a product or a sale) and perform a series of actions (such as exporting to a file type, adding a tag, etc.) without however being able to delete it.

- **Full Access** – In this column you find all the applications which the user who has the specific access level has the ability to perform all the actions given by the system.

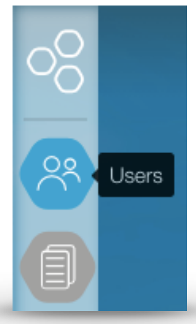
- **Custom** – In this column we move the applications to give the user who holds the specific access level, specific rights - all these rights mentioned above - (No Access, Read Only, Registration, Full Rights, Modification, Custom) per specific tabs in each application and not universally within the application. For example we can give a user in the application Products Full Permissions in the Categories tab but Only Read in sizes for example, and so forth.

5. After creating a new access level, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner. Once you have created the Access Levels, you are ready to create your users.

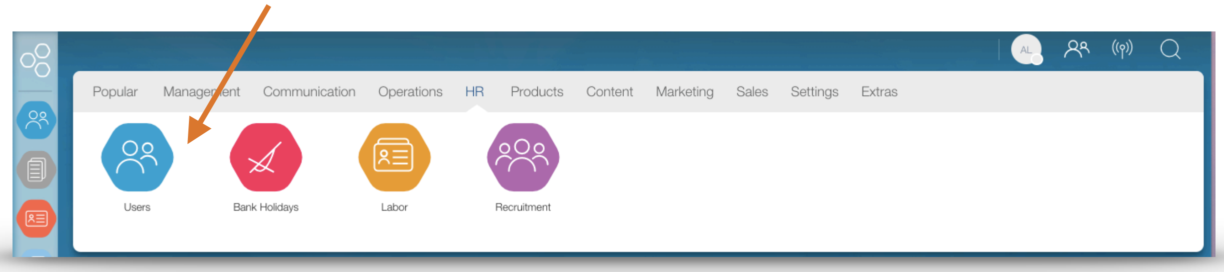
Creating / Editing Users

See below the steps to easily create users that will be able to manage the areas of the system they have been granted access to.

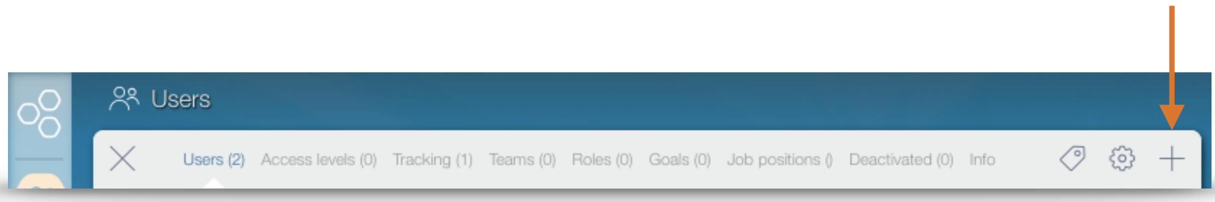
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Users app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **HR Category** where you will find the **Users app** inside.



3. Launch the **Users app,** select the **Users tab** and press the “+” icon or just press a user's name to see their details. You can even search from the top right search icon the name of the user or other respective user details. In case you add a new user, it will open a new form where you are able to fill in the required fields for the new user.

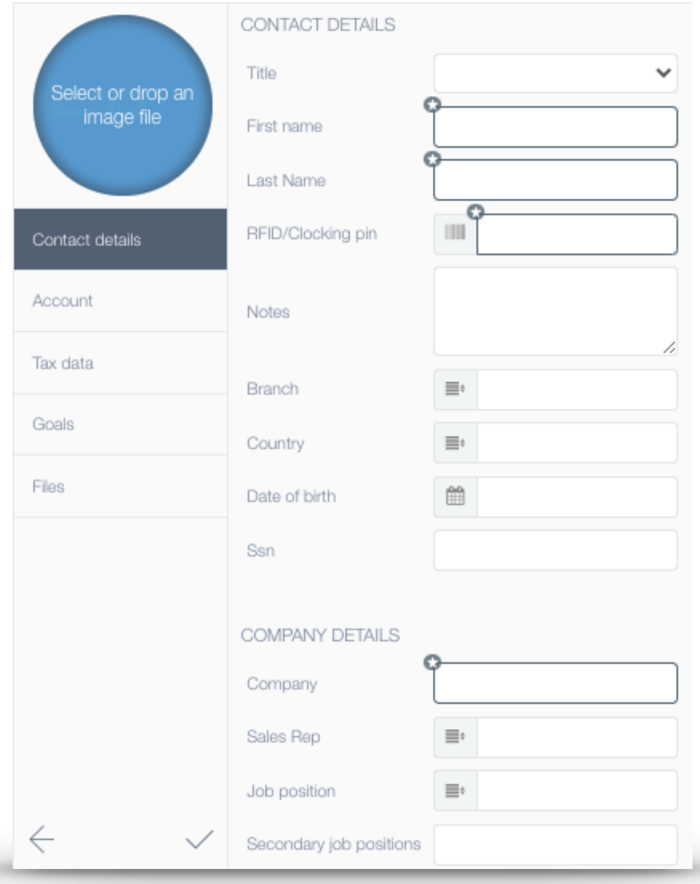


4. You should fill in, among others the following sections:

Either you create a new user (+) or you edit an existing user by selecting them and clicking on the pencil that appears at the bottom left of Users tab.

Select or drag an image file: Here you can set an image for the user if you wish, either by selecting from a File Manager or by dragging & dropping from a folder in the File Manager.

Sub Tab: Contact Details



- **Title** – Select the user title if desired, from the options Mr, Mrs, Ms, Dr, Prof.

- **First Name & Last Name** – Add the First & Last name of the user.

- **RFID Clocking Pin** – Define a numeric code in case the customer has the driver routing application and the specific user is a driver. This code is used instead of the QR (alternative connection method of the QR) to connect the driver to the Dispatch and start their shift.

- **Notes** – Add notes concerning the user that they cannot see when logged in their own user account in the system, only if you give them full permissions in the application Users.

- **Branch** – Select the Branch which the specific user is linked to (in case we are talking about a store staff or an executive).

- **Country** – Select Country if desired.

- **Date of Birth** – Select Date of Birth if desired.

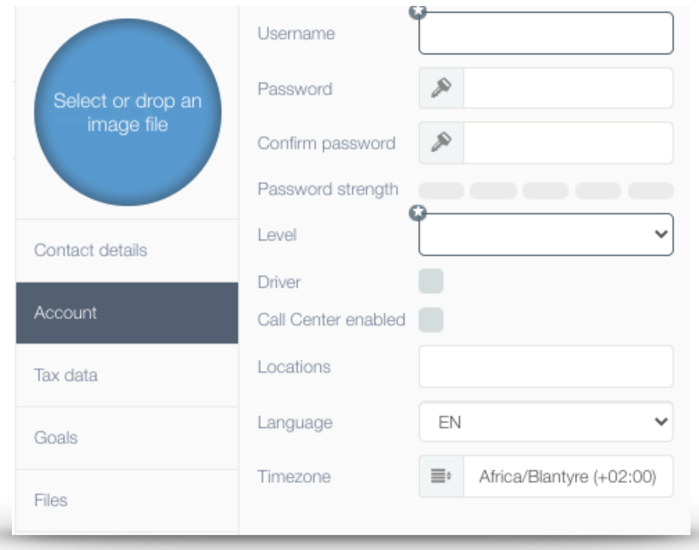
- **SSN** – Add their social security number, if needed.

- **Company - Sales Rep - Job Position** – Write the name of the Company in which they work as well as the manager of their company and the position in which they work.

In the communication details you can add a wealth of information regarding the user such as personal and corporate email, home or work address, landline or mobile phone, social media links and more.

- **Communication Details - Auto Inform** – Choose how the user prefers to be communicated by the company. Also, select if they prefer to be auto-informed via email, sms, call or never for example. Also add to this section all their preferable contact details as well.

Changing User Password (Users app)



Sub Tab: Account

- **Username & Password** – Define the username and password with which the user will be able to log in to the system. Note, the password after saving the log cannot be seen for reasons of encryption and security of the system, so you can only change it. Therefore, the moment you define it, you note it in an external file or password manager to give it to the user.

- **Confirm Password** – Type again the password for match confirmation.

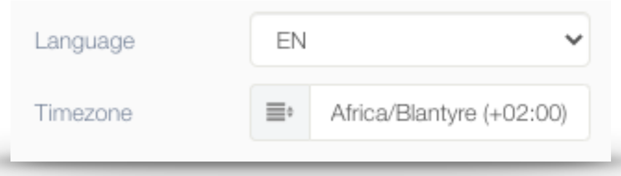
- **Access Level** – Select the Access Level which will be assigned by the specific user, and which you have created first through the process that we described above in Access Levels section.
See how to manage access levels

- **Is Driver** – Select the specific checkbox if this user is a driver. Otherwise they will never appear in the list of drivers on the Orders Monitor, they will never be able to connect to the Dispatch, nor to the Driver Assist application.

- **Call Center** – In case your fimble account we have been set up to support a call center (eg. Avaya but also Caller ID), then by selecting this checkbox, this user will be able to see the incoming calls directly in the fimble platform and allow a series of actions such as open a customer's tab and get information but also to see the Contact Information of the specific account.

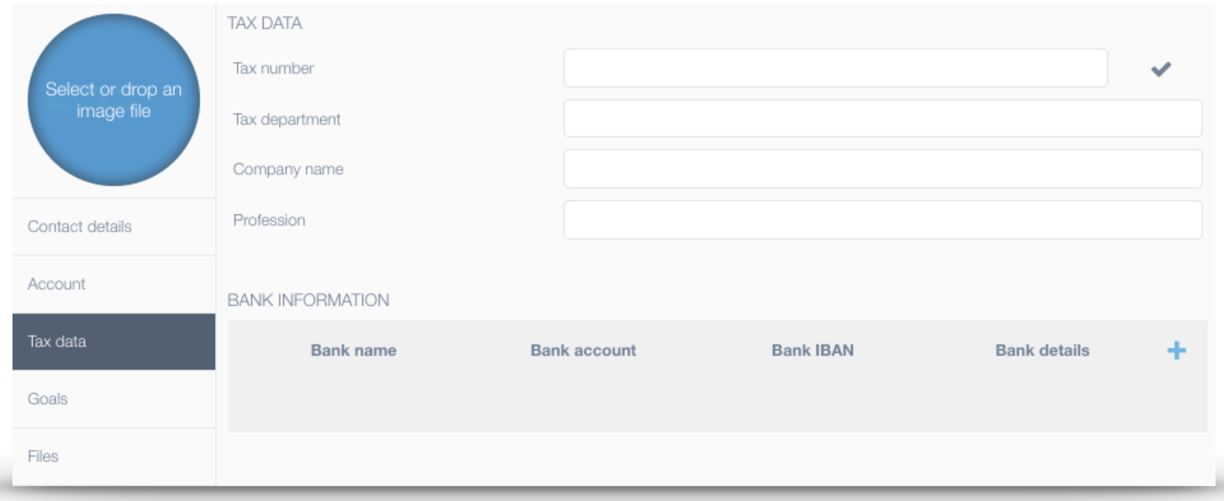
- **Location** – Select the locations which the specific user will be able to see information within the management platform (indicatively Orders and Sales, to use the POS system etc.). It is not necessary to be selected at all user access levels but mainly to users who are cashiers, managers, etc.
See how to manage locations

Changing the Language of Fimble Admin (Users app)



- **Language - Timezone** – Define the language you want the user to have. To change a language (and time zone if necessary), select language, log out and log back in to see the new selected system language. The language of the Admin can only be changed by those users who have Full Permissions in the Users application. (The Super Admin account can only be changed from the database, so you will need to contact us in order to change the language for the Super Admin).

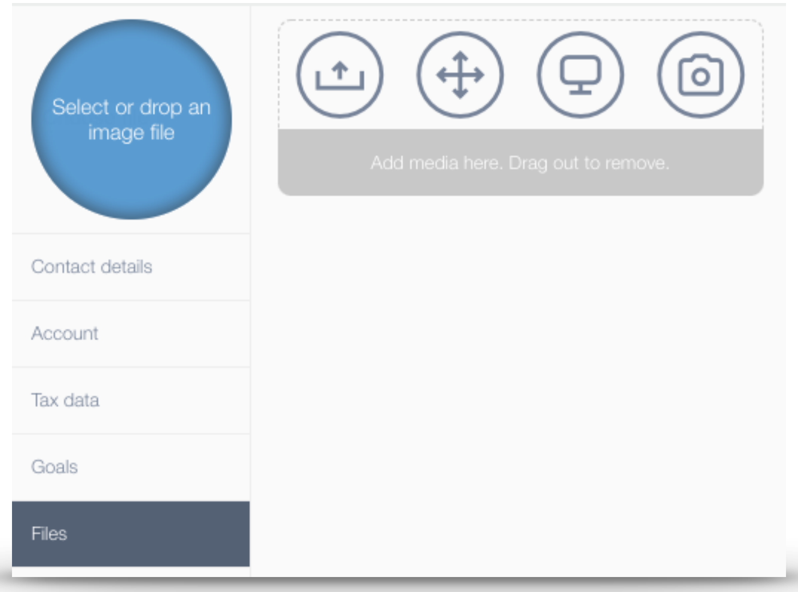
Sub Tab: Tax Data



Here you can fill in the user's tax information if necessary. This is required for invoicing. In case you add a corporate VAT number in the corresponding field, then the rest of the form is filled in automatically by the system. Also, the user can add here the contact's bank details for bank transfers reference.

Sub Tab: Files

Here you add files that relate to the specific user, such as their CV, their Clearance, their monthly Receipt of Salary, etc.).



5. After creating / editing a user, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Menu

Getting Started with the Menu

What the Menu consist of:

Product Categories

You can group your products by categories in the menu e.g. Pizza, Burgers, Drinks.

See how to add product categories

Sizes

Sizes allow you to sell a product in different kinds and sizes e.g. size of a pizza, pasta type, drink capacity.

See how to add sizes

Products

The products in the Fimble system will be dishes that reside in the categories e.g. Margherita, Cheeseburger, Lemonade.

See how to add products

Specs

With the help of specs, you are able to add additional information about the product such as VAT, product code, size, price, availability, as well as to choose if the product will be offered as an up-selling option on the checkout or not.

See how to add product specs

Raw Materials

With the help of raw materials, you can dynamically manage the raw materials that are used for supplier orders, product compositions and recipes. Supports material types, default storage points, unit types and default buy and sell prices. You can also specify the minimum stock required in the warehouse.

See how to add raw materials

Special Pricelist

The special pricelist functionality helps you create different pricelists per order type (Delivery, Takeaway, etc.).

See how to create special pricelists

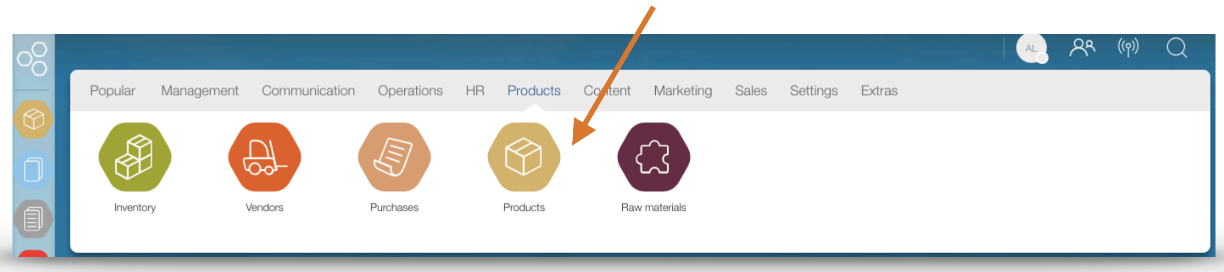
Product Categories Management (Products app)

In the Fimble system you can create product categories to better structure the products in your restaurant online menu. Categories and subcategories help you define in which category each product belongs to and help customers navigate and find easily what they are looking for.

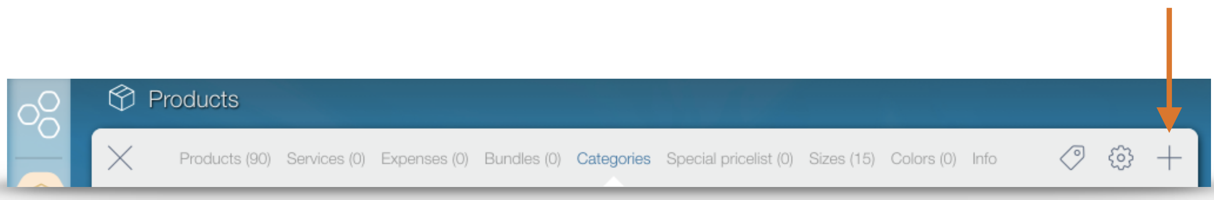
Creating Category

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Products app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

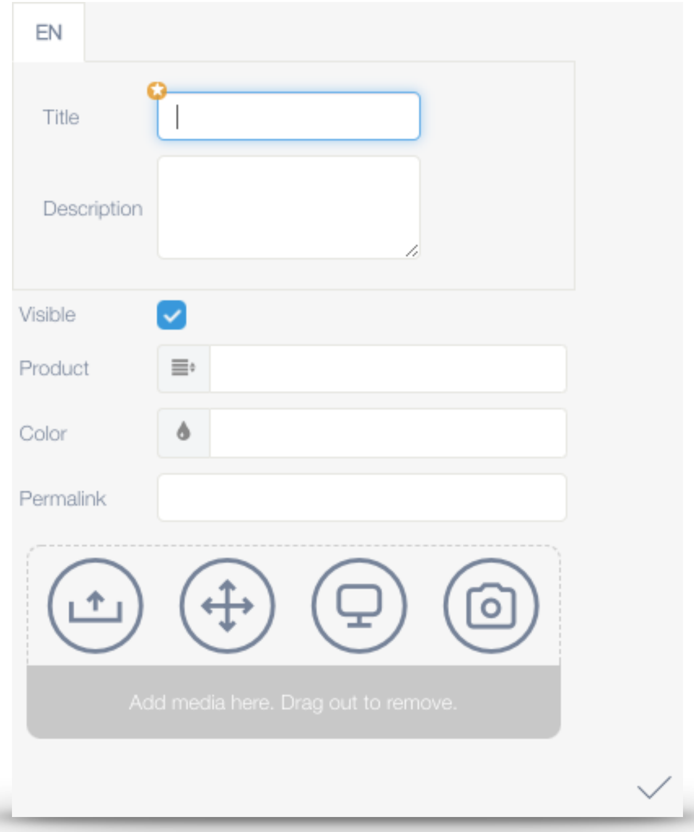
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Products app** inside.



3. Launch the **Products app,** select the **Categories tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the category, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in the following sections:



- **Title** – Add the category title for each language you have in the website (eg. EN: Greek / EL: Ελληνική, etc.).

- **Description (Optional)** – Add the category description, **if applicable**, for each language you have in the website (eg. EN: Upgrade your burger to 250gr with extra 1.50 € / EL: Μεγάλωσε το burger σου στα 250gr με 1,50 €).

Managing Product Category Visibility (Products app)

- **Visible** – Select the visible checkbox when you are ready to make the new category published on the website.

- **Color** – If you are using the POS, here you can set a specific color in which this category will be displayed.

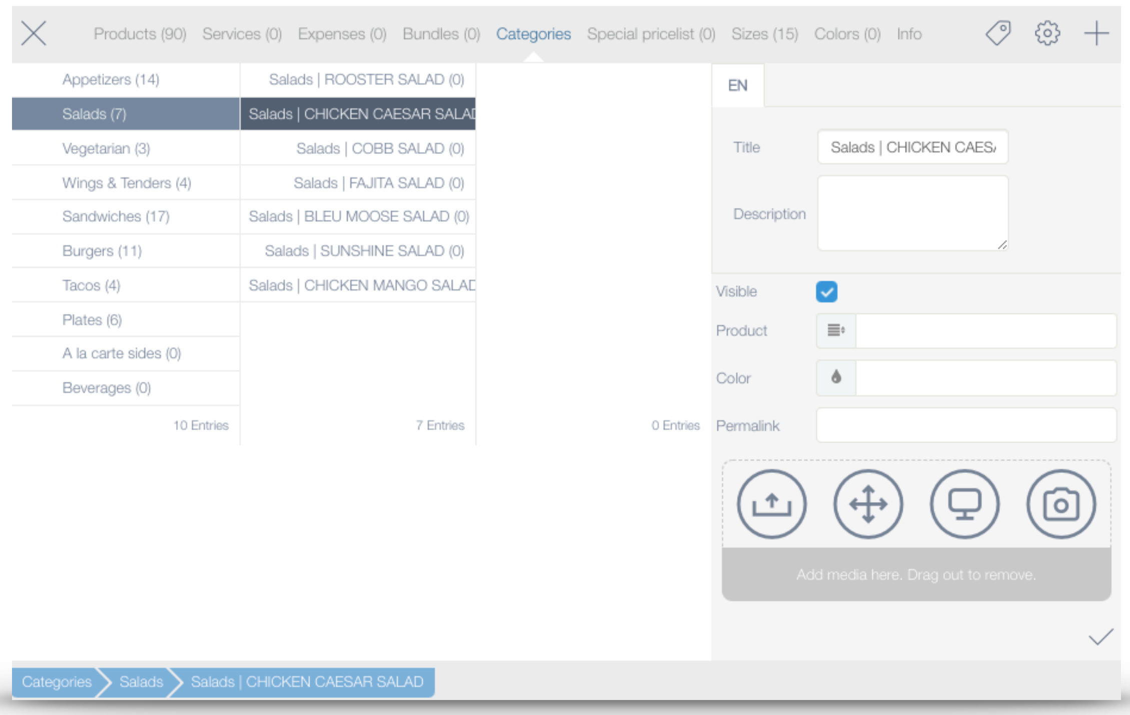
- **Permalink** – Add a permalink that will show in the url. Always write the name of the category in small English letters (eg. beef). In case you want to put 2 words or more, you should separate the words with a hyphen without spaces (eg. beef-burgers). You should never use capital letters and a space between words.

- **Media** – Add a category icon by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photo you uploaded, will be displayed in the respective channels (eg. Website, mobile apps, etc.).

5. After creating a new category, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Creating Sub-Category

After creating the categories, you need to create sub-categories within the categories, which do not appear in the website but relate exclusively to the product "building" in the Fimble admin platform.



The sub-categories have the form: “Salads | Choriatiki, Salads | Caesar’s, Salads | Boiled vegetables”, etc. Essentially within the categories, you create sub-categories, one for each product.

1. You should fill in the following sections:

   - **Title** – Add the sub-category title for each language you have in the website (eg. EN: Salads | Caesar’s / EL: Σαλάτες | Caesar’s, etc.).

   - **Description (Optional)** – Add the sub-category description, **if applicable**, for each language you have in the website.

   - **Color** – If you are using the POS, here you can set a specific color in which this sub-category will be displayed.

   - **Permalink** – Add a permalink that will show in the url. Always write the name of the category in small English letters (eg. beef). In case you want to put 2 words or more, you should separate the words with a hyphen without spaces (eg. beef-burgers). You should never use capital letters and a space between words.

2. After creating a new subcategory, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

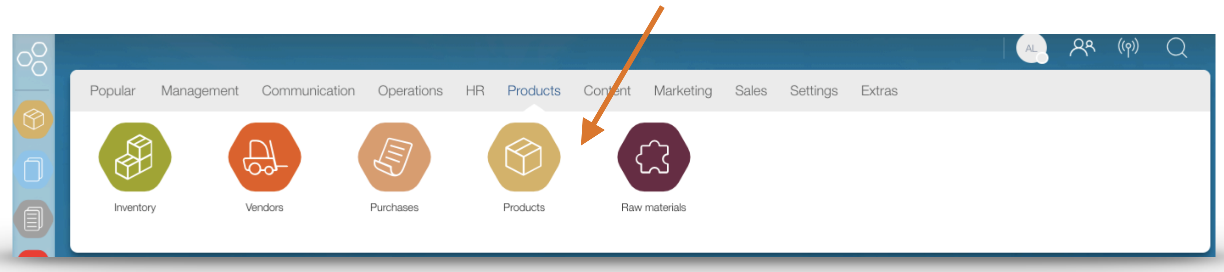
Sizes Management (Products app)

You should create the sizes that correspond to products.

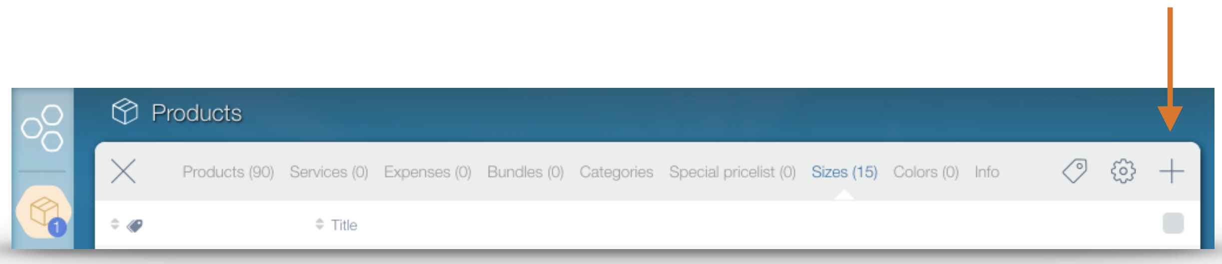
Creating Size

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Products app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

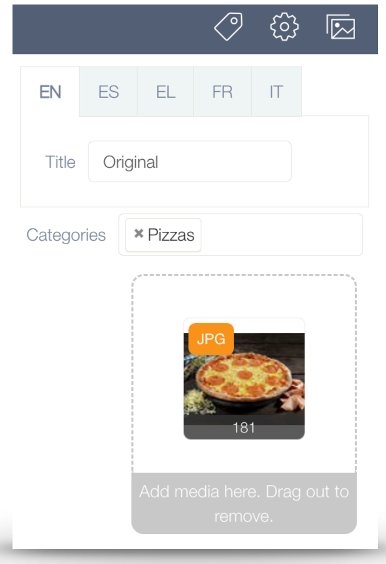
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Products app** inside.



3. Launch the **Products app,** select the **Sizes tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the size, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in the following sections:



- **Title** – Add the size title (e.g. Half portion, Whole portion, 350ml, 500ml and so on).

- **Categories** – Select the sub-categories that correspond to the size (eg. for the size Large (10 Slices), select the sub-category Pizza | BBQ Pizza).
  See how to manage product categories

- **Image** — Select the image that you want to be displayed per size (on size selection field within a product)

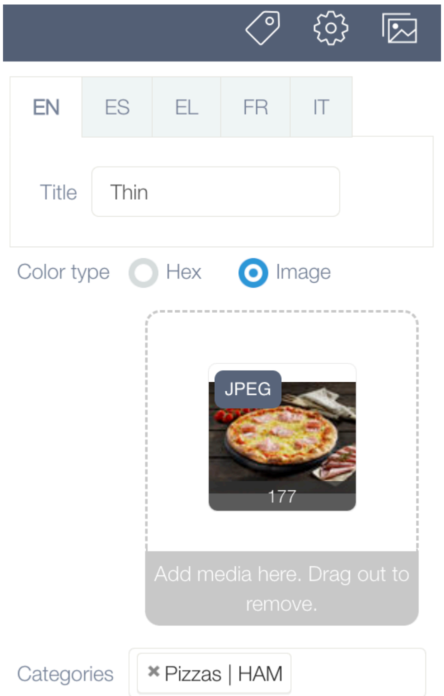
5. After creating a new size, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Color Management (Products app)

Colors provides you the ability to give different specifications on products sizes. For example, let's say that we have a pizza with three different sizes such as 6 pieces, 8 pieces and 12 pieces and we also have different crusts for each size. Then you can match a size with a color (crust) such as, 6 pieces -> thin curst, 8 pieces -> fluffy and 12 pieces -> philadelphia. The same would be if instead of a pizza was a burger, with different breads (colors).

1. Once you open the **Products app** go to the **Colors tab** and create a new one.

2. You should fill in, among others the following sections:



- **Title** – Add the color title.
- **Color type** — Select & add an image (optional)
- **Categories** – Add the sub-categories that correspond to the products.

Products Management (Products app)

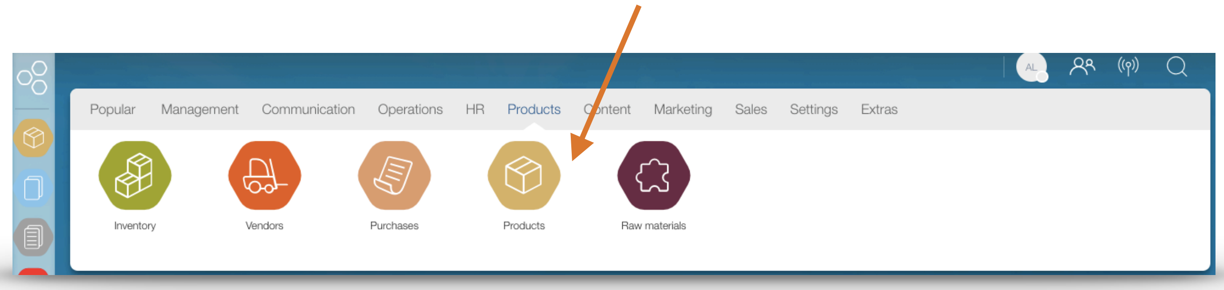
In Fimble admin you can easily manage products on your menu. See how to add products, how to manage them, and how to upload their photos. With these options you will make your website more attractive and increase online sales in your restaurant.

Adding Product

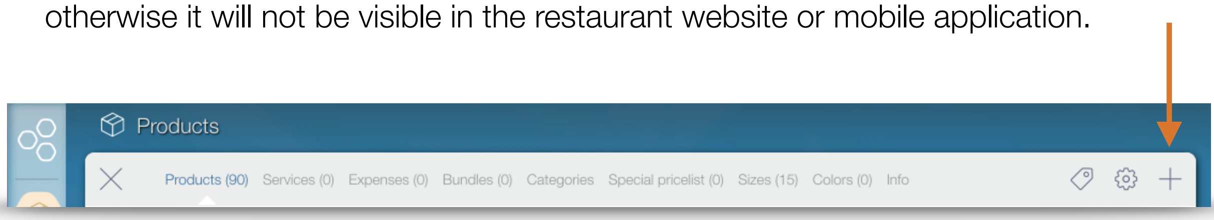
See below the steps to easily add products to the menu that you want to offer to your restaurant customers.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Products app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Products app** inside.

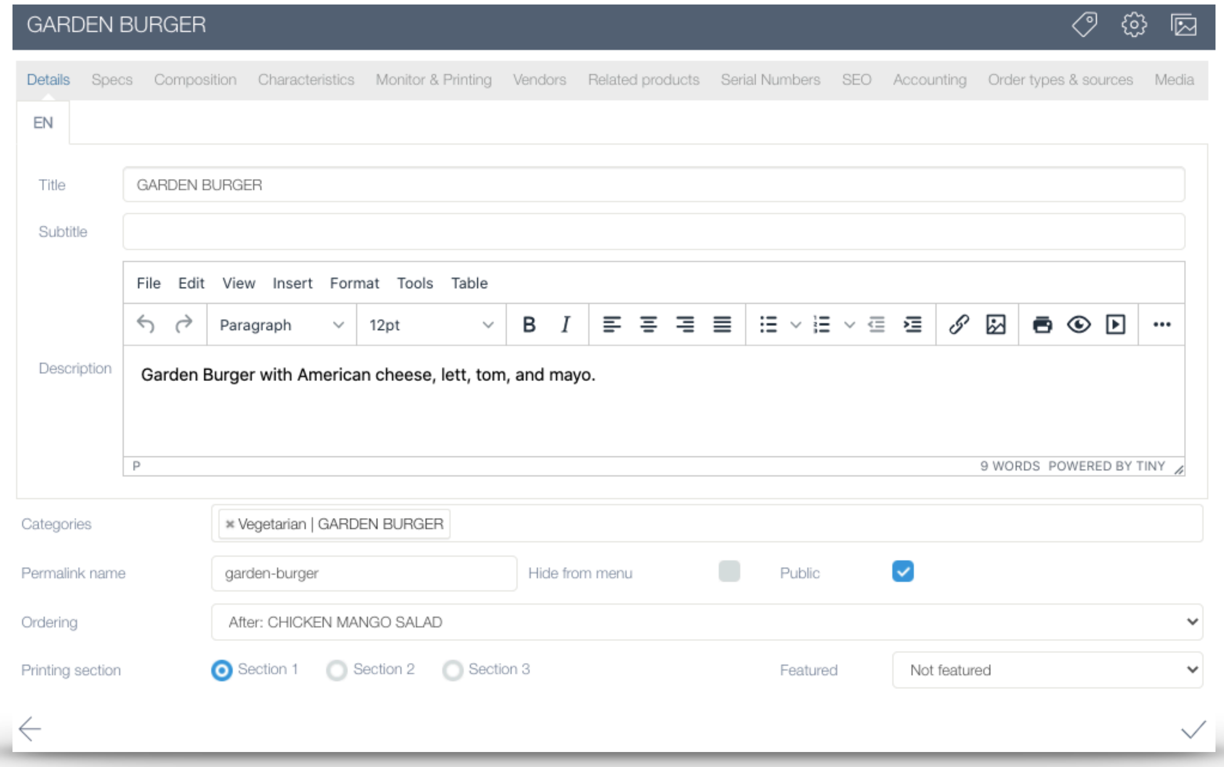


3. Launch the **Products app,** select the **Products tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the product, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in, among others the following sections:

Sub Tab: Details



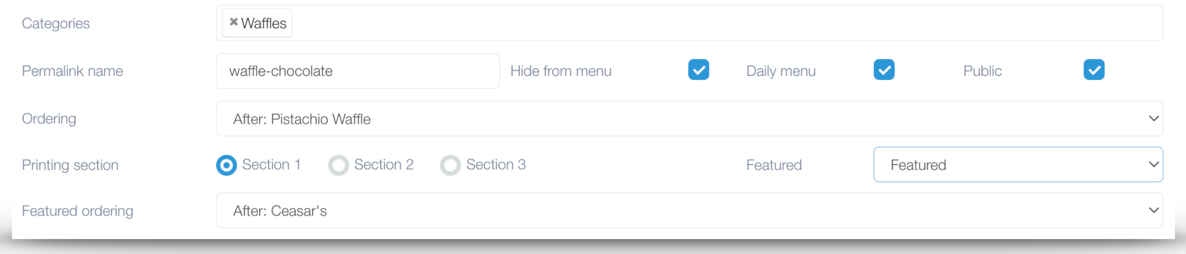
- **Title** – Add the product title (eg. EN: Greek Salad / EL: Χωριάτικη).

- **Description** – Add the product description (eg. EN: tomato, cucumber, olives, feta cheese, onion, olive oil / EL: tomato, cucumber, olives, feta, onion, olive oil).

- **Categories** – Select the sub-category that corresponds to the product (eg. for the product BBQ Burger, select the subcategory Burger | BBQ Burger). See how to manage product categories

- **Permalink Name** – Add a permalink that will show in the url. Always write the name of the product in small English letters (eg. greek). In case you want to put 2 words or more, you should separate the words with a hyphen without spaces (eg. greek-salad). You should never use capital letters and a space between words.

Managing Product Availability (Products app)



- **Hide from menu** – Check this if you want this product to be purchased but not from inside the menu. For example, you might sell a product only through a combo offer, in this case you will set this product as public but also as hidden from the menu. Also, the kitchen utensils like spoons, forks, knives, and plastic bags might need to be marked as hidden if you do not want them to be visible inside the menu but only visible at the checkout page.

- **Daily menu** — Select this option to create different menus for each day of the week with specific products, in different locations and for a specific period of time.
  See how to create a Daily menu

- **Public** – Once a product is fully created you check Public so it appears in the predefined distribution channels.

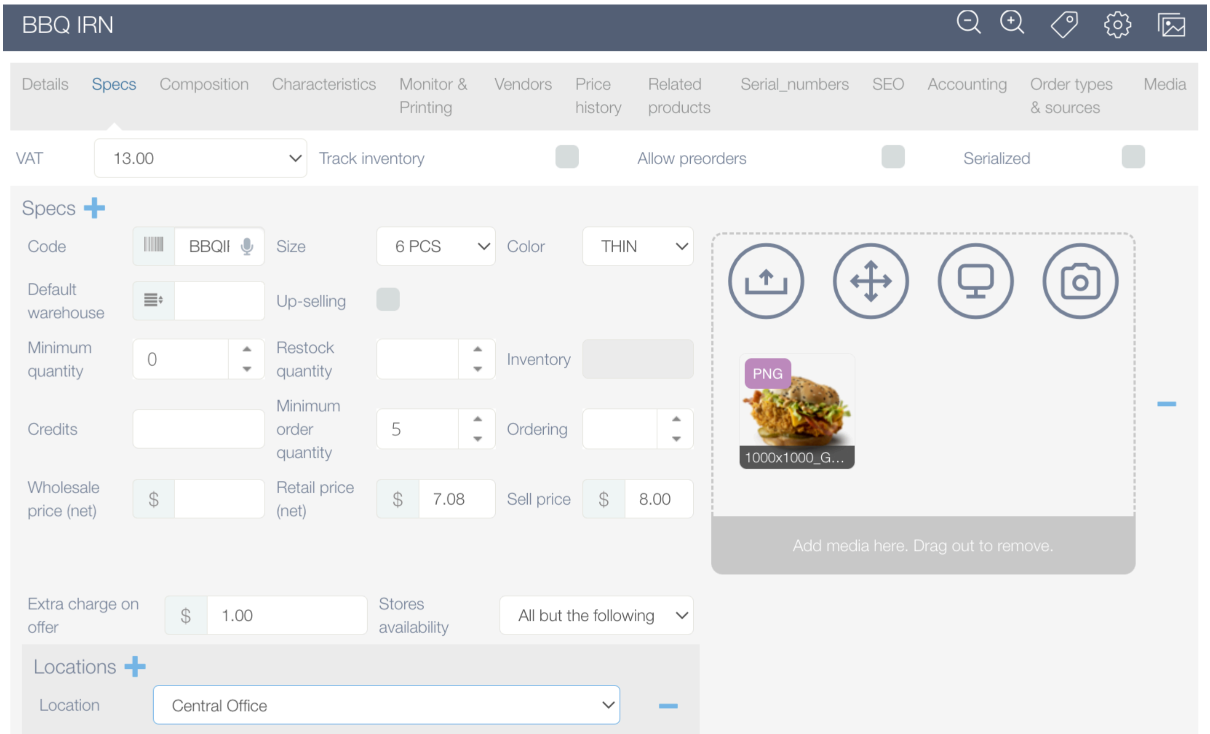
- **Ordering** – Optional: Define after which product, the product you are creating will be displayed. The default is as you create the products, in this order they will appear in the menu.

- **Featured** – Choose if the product you are creating will be displayed in the featured products / dishes. In case you select Featured, a corresponding sorting field will appear below (Featured Ordering) where you define the point at which it will be displayed among the other featured products.

Specs Management (Products app)

<u>Sub Tab: Specs</u>

You can add more than one spec to the product by pressing the “+” key, and you are able to set different attributes (eg. different code, size or even sell price). In case you would like to revert what you did, use the corresponding “-” key which subtracts what you added.



- **VAT / TAX** – Select the Value Added Tax that corresponds to the product.

- **Code** – Define a product / dish code. In case you do not already have dish codes, an indicative way of creating a code is the following: Capital Latin characters (2 to 5), preferably, according to the product name (eg Greek Salad -> GRSLD).

- **Size** – Select the size that corresponds to the product.
  See how to manage sizes

- **Image per spec/size** — Here you can select different images per spec. That means when a customer selects different sizes within a product the main image (in customizer) will be changed based on the corresponding one. Keep in mind that this is a different image form the one that corresponds in Size selection field.

- **Color (per size's spec)** — Select the color you want to match with the size you have already chosen (e.g. Size: 6 pieces, Color: Thin crust). If you select a color without selecting a size, the color will not appear within the product.

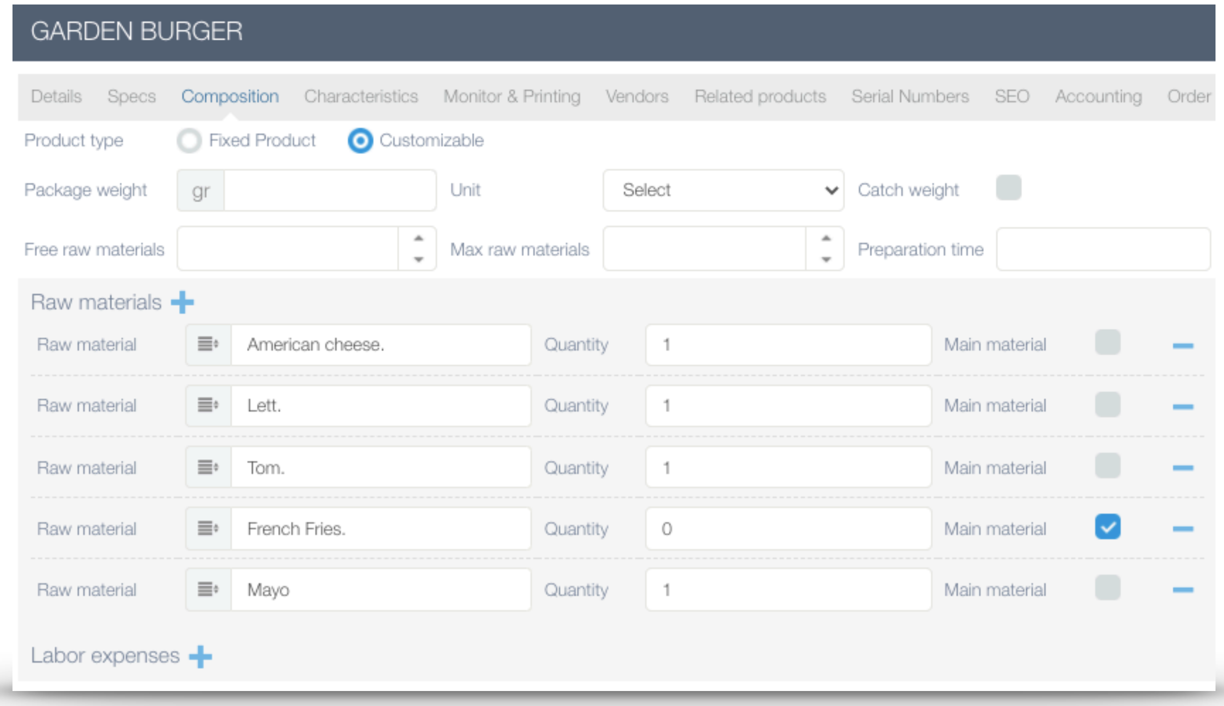
- **Minimum order quantity** — Select the minimum amount of a product/spec that a customer can order (applies only in Catering method).

- **Sell Price** – Set the price that will appear on the website, depending on the specified VAT, while the price before tax is automatically set in the corresponding field (Retail Price).

- **Store Availability** – In case you own more than one store and the specific product is not available in the menu of all stores, from this field you define in which stores it will NOT be included in the menu by choosing the respective locations.

  See how to manage locations

Composition Management (Products app)



<u>Sub Tab: Composition</u>

- **Product Type**
  - Select: Fixed > If you do not want the customer to be able to add or remove any ingredients from the recipe, rather than just add a comment.
  - Select: Customizable > If you would like the customer to be able to add or remove some ingredients from the recipe.

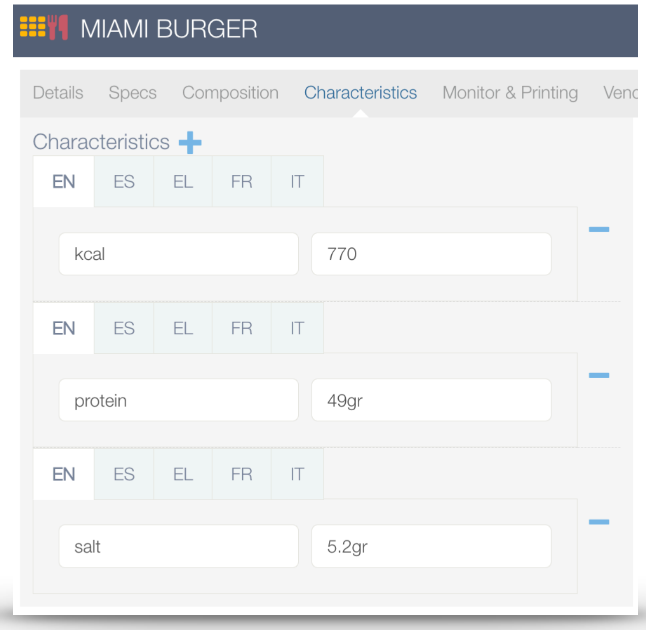
- **Raw Materials** – By pressing the "+" key you select the raw materials included in the recipe. By choosing a raw material as the main material, this means that the customer, even if he removes it from the recipe, will have to add at least one material from this category in order to complete their order. If for example in a wrapper they remove the pie from the recipe and in the same category as the pie there is the double pie, the Cypriot, the Arabic and the bread, when they press Add to Cart, the system sends a message forcing them to choose at least one ingredient (eg. in the place of the pie to choose the Arabic pie) from this specific category. (from the corresponding key "-" subtract what you added).

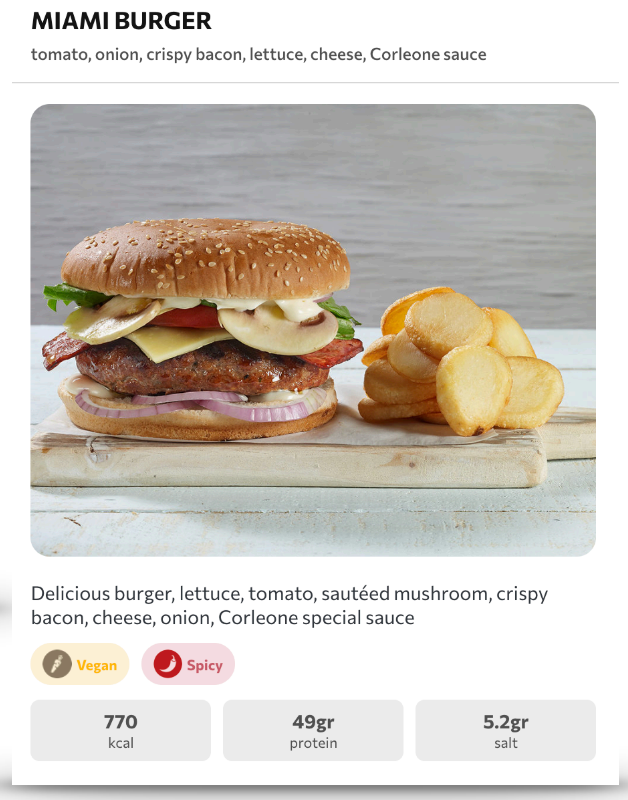
  See how to manage raw materials

Characteristics Management (Products app)

<u>Sub Tab: Characteristics</u>

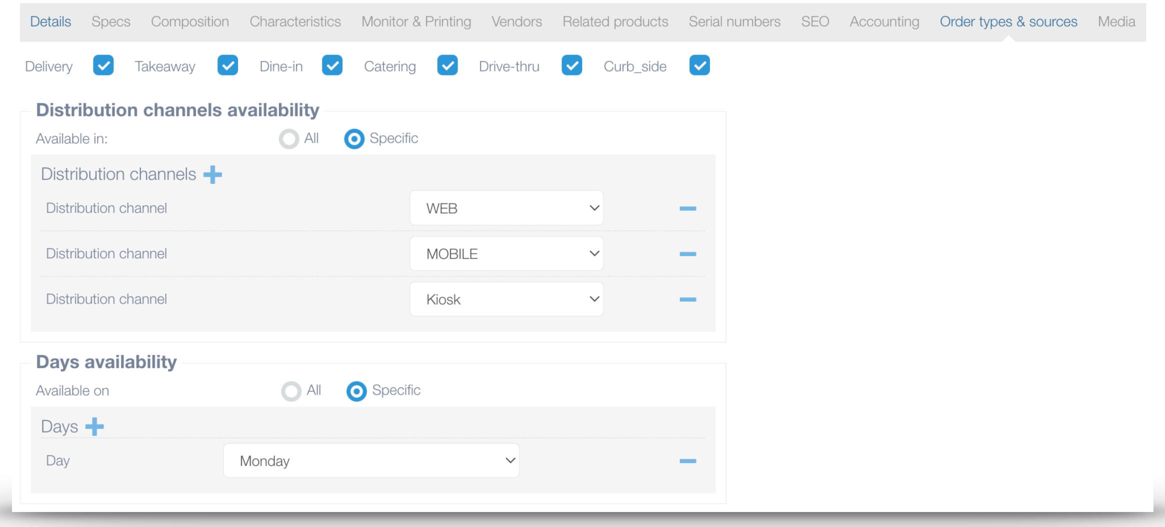
In Fimble you can add the nutritional information of products and be shown on your website within the product's customizer. The first field is the "subtile" and the second one is the “Title" meaning that the second field will be shown with bold and above the first one.





Managing Order types & sources (Products app)

Sub Tab: Order Types & Sources

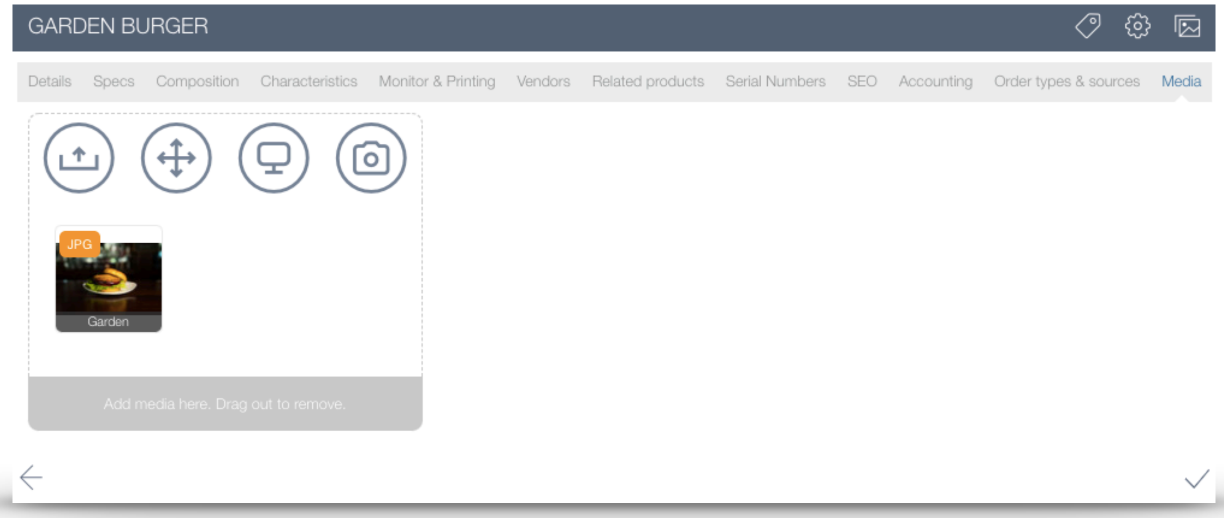


- **Order Types & Sources** – Select which types of the order, the product will be available [Delivery, Takeaway, Dine-in, Drive through, Curbside (if applicable), etc.
  See how to manage order types & sources

- **Distribution Channels Availability** – Select the availability per distribution channel, if for example you want the product to be displayed only on the website, only in the application for Android or iOS and so on.

- **Days Availability** – Select availability per day.

Sub Tab: Media



- **Media** – Add photos of your products by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photos you uploaded, will be displayed on the respective channels (eg. Website, mobile apps, etc.).

5. After adding a new product, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

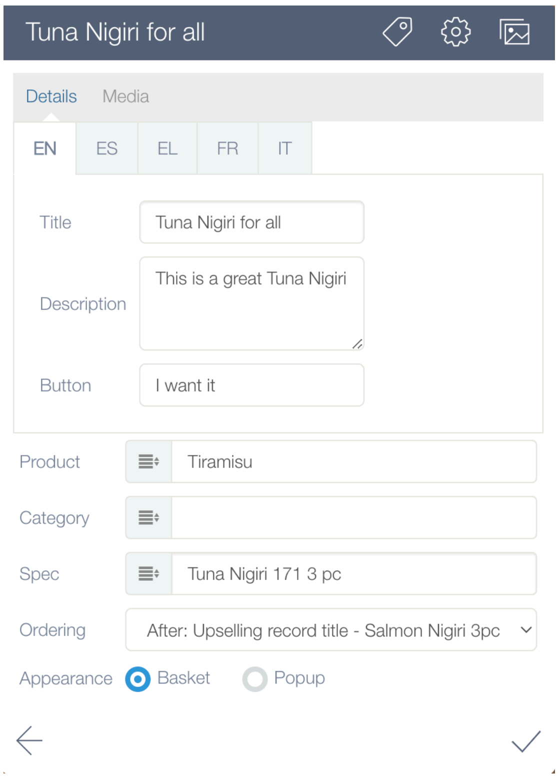
Managing Cross-selling products (Upselling app)

Select the products that you want to be displayed as a suggestion in the shopping cart when a customer adds a specific product to their cart.

1. Search **Upselling app** by clicking the magnify glass (top-right) and type its name.

2. Launch the **Upselling** app, select the **Upselling** tab and press the "+" icon.

3. You should fill in, among others the following sections:



- **Title** – Add the title that will be displayed at the basket, for the cross-selling product. If null, then the title will be the default name of the product

- **Description** - Add a description for the cross-selling product

- **Button** - Add a button title for the cross-selling product (e.g. I WANT IT). If null, then the button will be a basket icon.

- **Product** - Select the product that will display the cross-sell product (spec) in the basket

- **Category** - Select a product category if you want a specific product (spec) to be displayed in the basket as a cross-sell when a customer selects any of the products included in that category

- **Spec** - Select the cross-selling product to be displayed in the basket (e.g. When a customer selects a burger you'd like to cross-sell a coca-cola as well. In this case the **product** is the **burger** and the **spec** is the **coca-cola)**

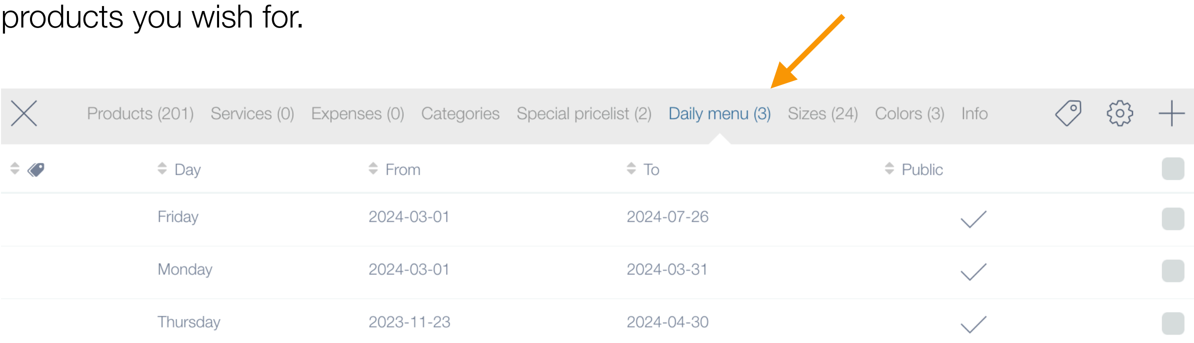
- **Ordering** - The order in which cross-selling products will be displayed in the basket

- **Appearance** - Select the **Basket** option to display your product in the basket.

4. After adding a new cross-selling product, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Daily menu management (Products app)

Fimble provides you the ability to create different menus for each day of the week with specific products, in different locations and for a specific period of time. Once you open the **Products app** go to the **Daily menu tab** and create your daily menu with the products you wish for.



In order to setup a daily menu you need to select:

- **Day** — Select the day you want your daily menu to be available.
- **Period (From - To)** — Select the period of time you want your daily menu to be valid (e.g. every Monday From 01/03/24 To 31/03/24).
- **Locations** — Select the location(s) you want your daily menu to be applied.
- **Overwrite menu** — Select this option if you want the website/apps to display only the products on the daily menu (each day you set) and not the whole menu.
- **Products** — Select the products that are going to be applied in the daily menu.
- **Public** — Make your daily menu active.

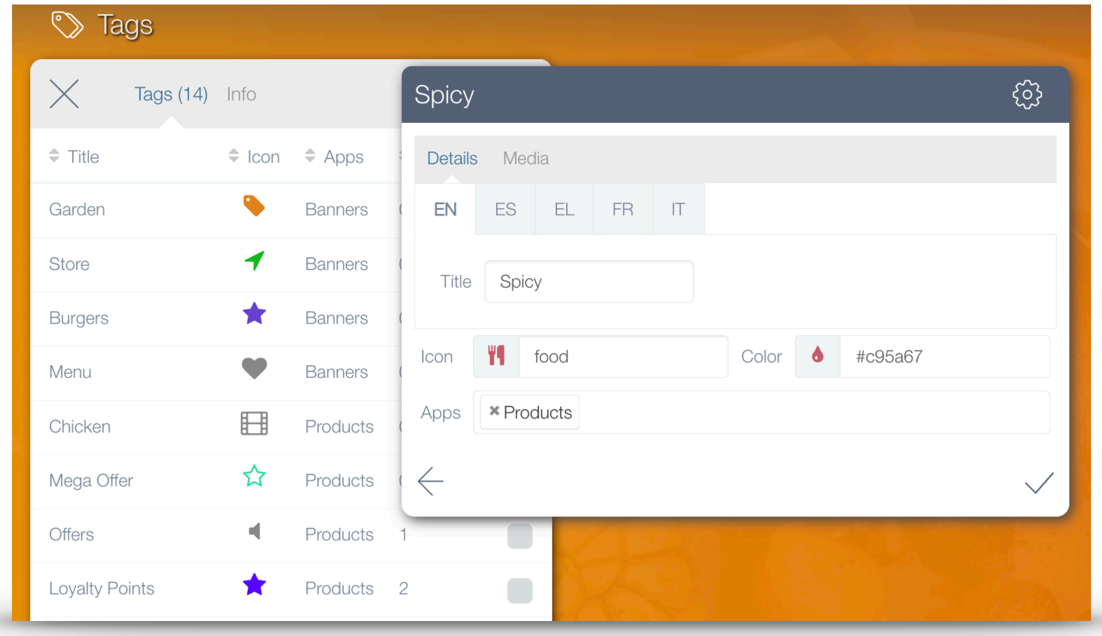
Once you have set this up, go to the Products application > Products tab and select the Daily Menu checkbox for each product you have included in a Daily Menu. Products selected as both Daily Menu and Public will only appear on the site/app on the day you have set the Daily Menu to contain these products.

Products selected as Public only will always be displayed on the site/app regardless of which products are in the Daily Menu that day.

Tags in products

In Fimble you can create a variety of different filters (tags) for your products such as, Vegetarian, Gluten-free, On-offer, Loyalty points, etc.

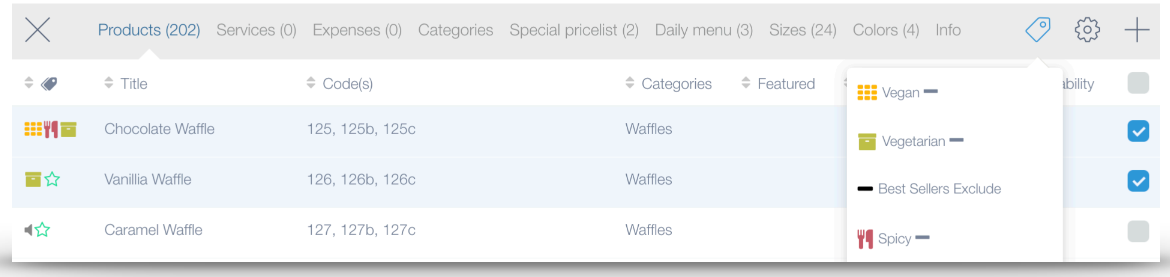
1. Open the **Tags app** and click the '**+**' to create a new record.
2. You should fill in the following sections:



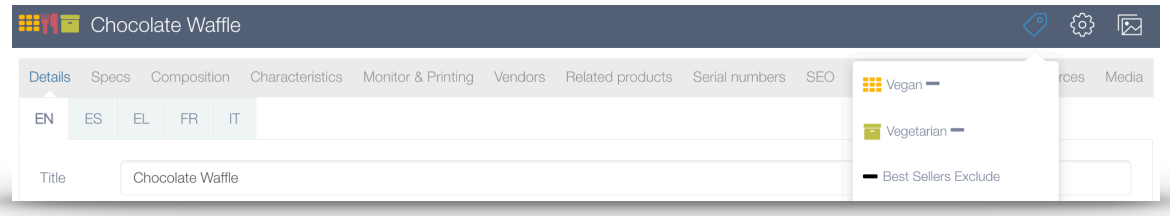
- **Title** — Add the title you wish to be displayed on the website (one for each language that is available on your website).
- **Icon** — Select one of the available icons that suites in each case.
- **Color** — Select the color of the filter.
- **Apps** — Match this tag with the Products app.

3. Once you create the tags you need to return to the Products app and match the products with the respective tags. Keep in mind that you can match a product with more than one tag (e.g. Vegetarian, Spicy, On-offer).

  - **Mass selection** — Select the products you want by clicking the checkboxes , go to the tag button and assign the tag(s).



  - **Single selection** — Open a product and go to the tag button and assign the tag(s).



  - **Remove tag** — To remove a tag, follow the above steps and just click the tag you want to be removed from a product or a plethora of products.

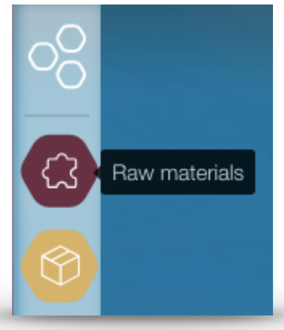
4. After completing your setup go to the website and check if everything is as you wanted to be. Filters (tags) should look like this.

Raw Materials Categories Management (Raw Materials app)

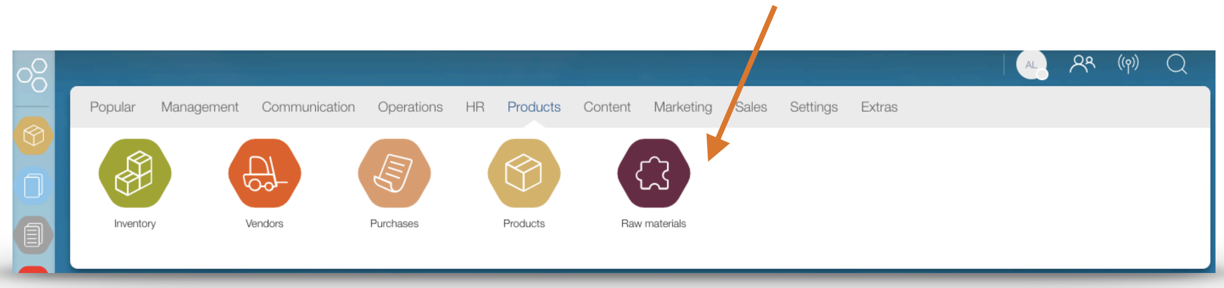
In Fimble you can easily manage the raw materials categories of your products in your menu. See how to add raw materials categories, and how to manage them.

Creating Category

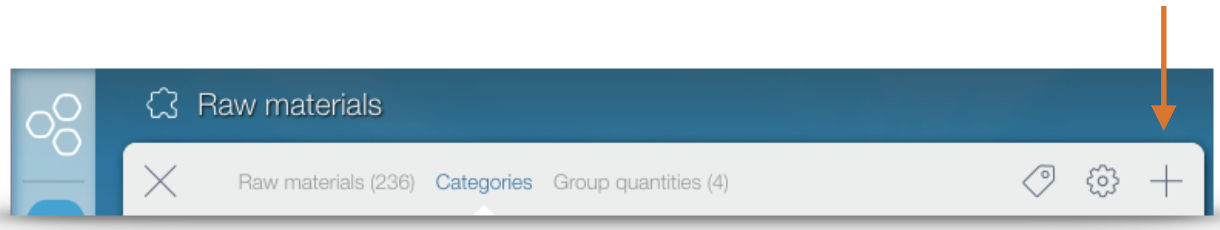
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Raw Materials app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



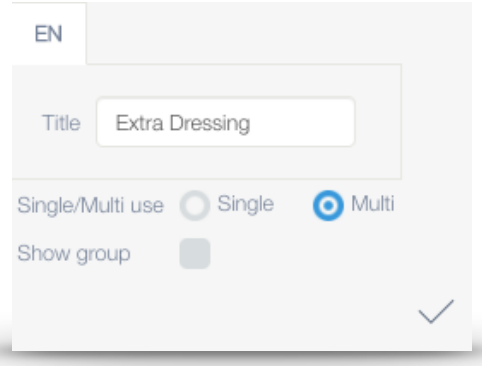
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Raw Materials app** inside.



3. Launch the **Raw Materials app,** select the **Categories tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the raw materials category, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in the following sections:



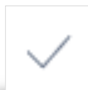
- **Title** – Add the category title for each language you have in the website (eg. EN: Vegetables / EL: Λαχανικά, etc.).

- **Single / Multi Use** – Select whether the customer can select only 1 or multiple raw materials of this category on a single product.

- **Show Group** – Check this if you want to relate this category to a specific Group quantity.

- **Quantities in Categories** – Check this if you want to relate this category to a specific Group quantity. Select the group quantity that you want to relate to this category.

5. After creating a new category, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

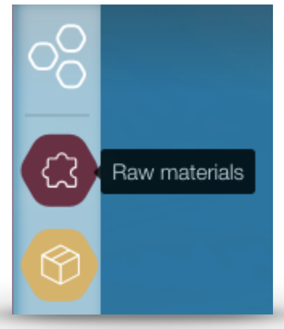


Group Quantities Management (Raw Materials app)

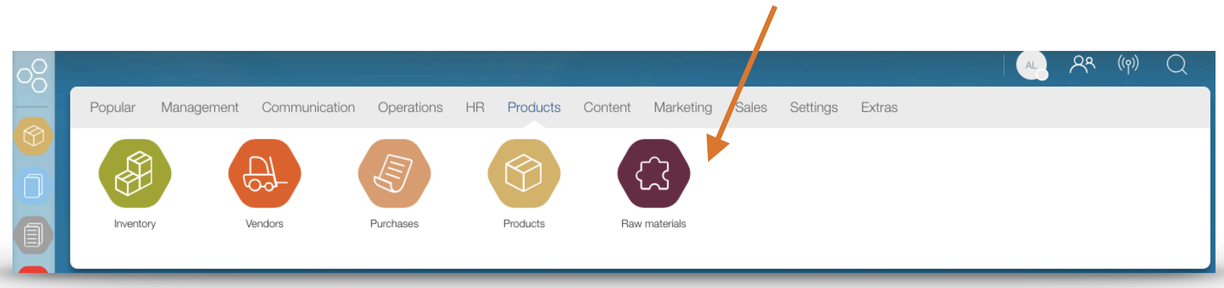
In Fimble admin you can easily manage the group quantities of the raw materials for your products in your menu. See how to create group quantities, and how to manage them.

Creating Group Quantity

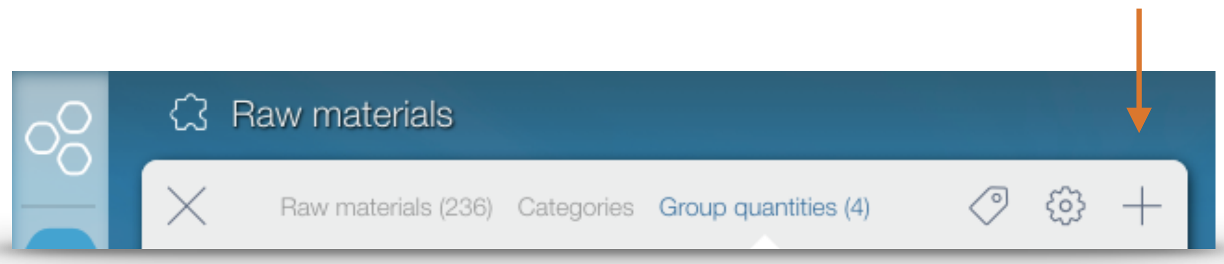
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Raw Materials app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



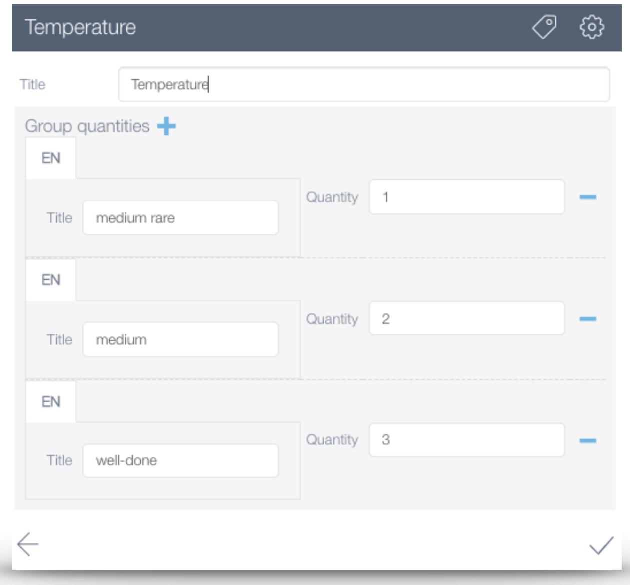
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Raw Materials app** inside.



3. Launch the **Raw Materials app,** select the **Group Quantities tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the group quantity, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in the following sections:



- **Title** – Set a title for internal use. (This is not displayed on the website or mobile application)

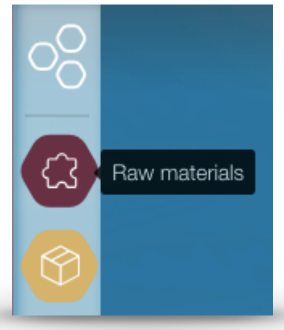
- **Group Quantities -** Define the different quantity options that the customer can select when adding this specific raw material eg. if the customer selects Americano Coffee and adds sugar (raw material) they are able to select the quantity of sugar that they want but not as 1/2 etc, since this is not user friendly and the customer is not used to selecting the quantity of spoons, but as Medium/Sweet. So, you can set a title for internal use eg "Sweeteners for coffee" and then add all the rest of the options by defining the title that the customer will see eg Medium and the multiplier based on the raw material portion eg if the standard portion of a spoon of sugar is 50g and the Medium option needs 2 spoons of sugar then the multiplier would be 2. Once you have set up all your available Group quantities, you will need to relate them to the respective Raw Material Categories that use those Group quantities. For example, the Sweeteners group quantity will need to be related to the "Sweeteners" category which is the category of White Sugar, Brown Sugar and Stevia. Based on this example, when the customer wants to add White Sugar they will also see the options Medium & Sweet. In addition, you can set the different quantity rules between the different product categories.

5. After creating a new group quantity, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Raw Materials Management (Raw Materials app)

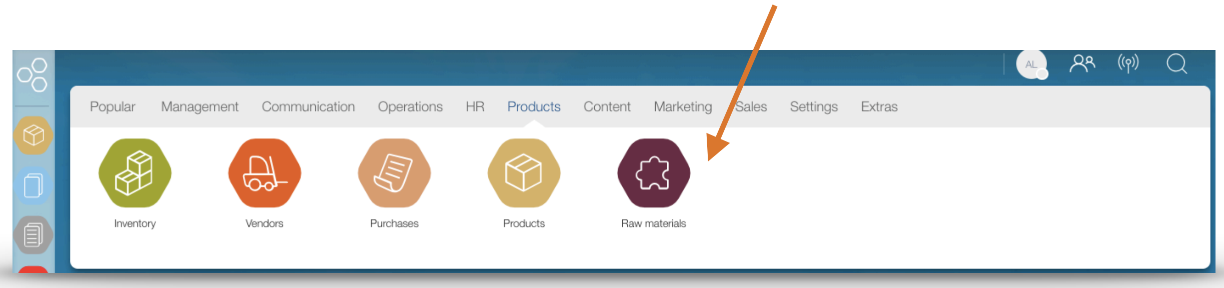
See below the steps to easily add raw materials to products that you want to offer to your restaurant customers.

Adding Raw Material

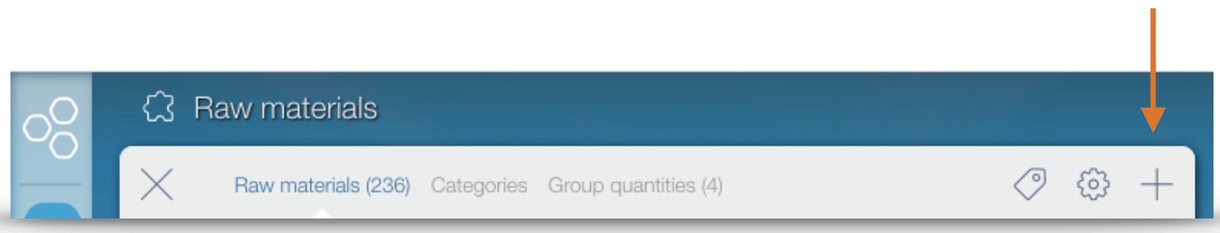


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Raw Materials app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Raw Materials app** inside.

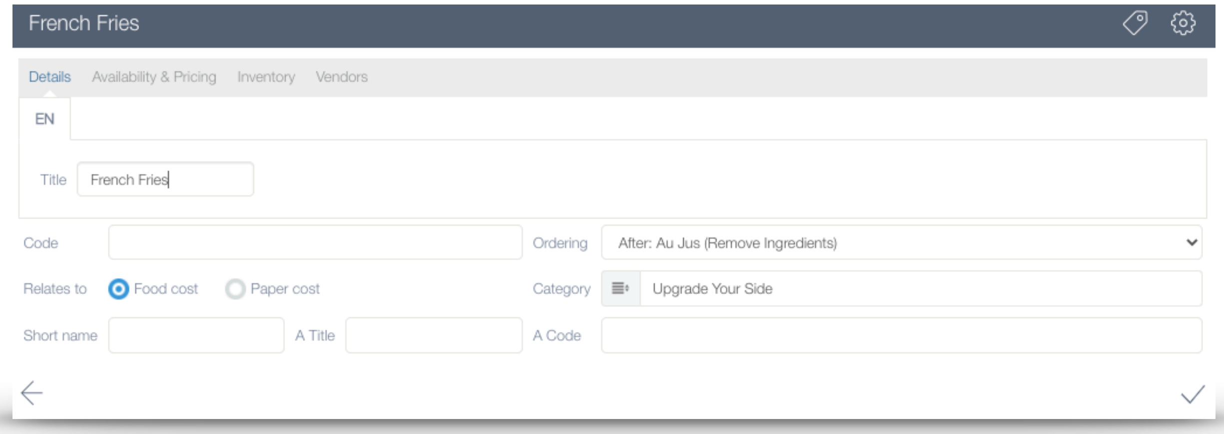


3. Launch the **Products app,** select the **Raw Materials tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the raw material, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in, among others the following sections:

Sub Tab: Details



- **Title** – Add the title of the material (shown on the website).

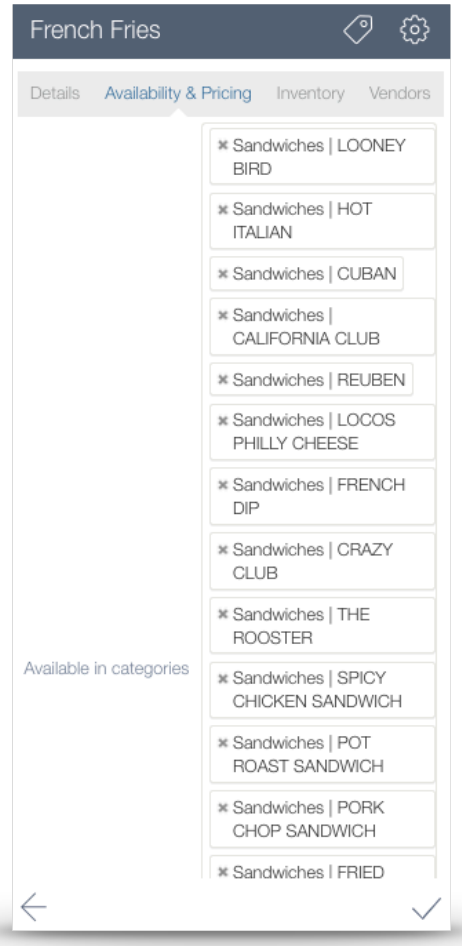
- **Code** – Set the unique internal code.

- **Ordering** – Define in which order this raw material will be displayed inside the product customiser.

- **Relates to** – Select whether this raw material is calculated in Food cost or Paper cost.

- **Category** – Select the category of this raw material as displayed inside the product customiser.
  See how to manage raw materials categories

Sub Tab: Availability & Pricing



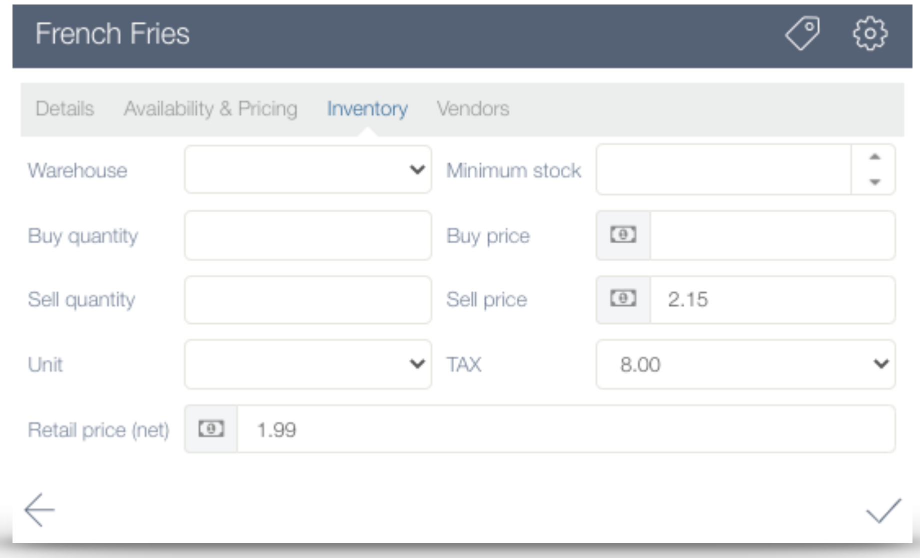
- **Available in categories** – Select the sub-category / sub-categories of products where the specific material is available.
  See how to manage product categories

- **Show Group** – By selecting the checkbox you can define the quantity group that will appear as an option in the specific material. If, for example, you make the raw material Sugar and you have created the group of quantities Sweeteners with options Simple, Medium, Sweet, then you select the Sweeteners in the specific field and respectively in the product customizer, by clicking on the sugar material, it will display the options Simple, Medium, Dessert.
  See how to manage group quantities

- **Prices per product sizes** – Choose the price that the material will have per product size. For example, the ham material has a different cost in an 8-piece pizza than in a 12-piece and another with 24. So you should first select the size of the product (eg. 12 pieces) and the price of the ham for this product size. You have the option to add a new row and follow the same flow for the other sizes as well.
  See how to manage sizes

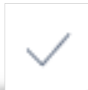
- **Store Availability** – In case you own more than one store and the specific raw material is not available in the menu of all stores, from this field you define in which stores it will NOT be included in the menu by choosing the respective locations.
  See how to manage locations

Sub Tab: Inventory



- Set VAT and Sell Price. In case the material is weighing, then you should select the Unit of Measurement per Kilo and in the Sell Price field you fill in the price per kilo.

5. After adding a new raw material, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



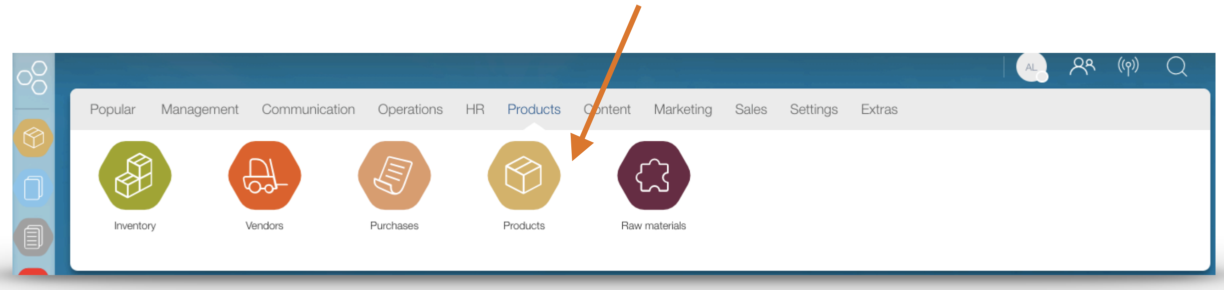
Special Pricelist Management (Products app)

In case there are different Pricelists per type of order (Delivery, Takeaway, etc.), then you can create a new special Pricelist through Fimble admin.

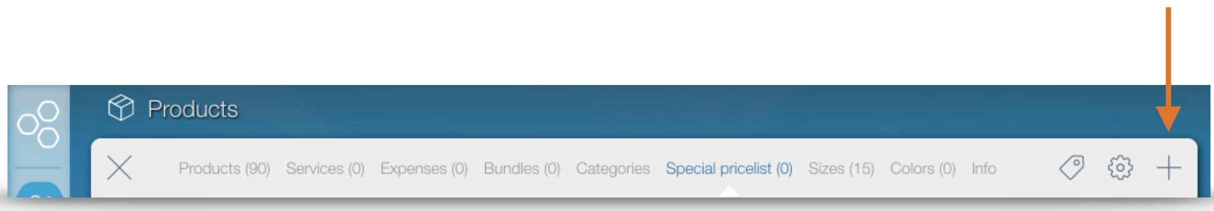
Creating Special Pricelist

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Products app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

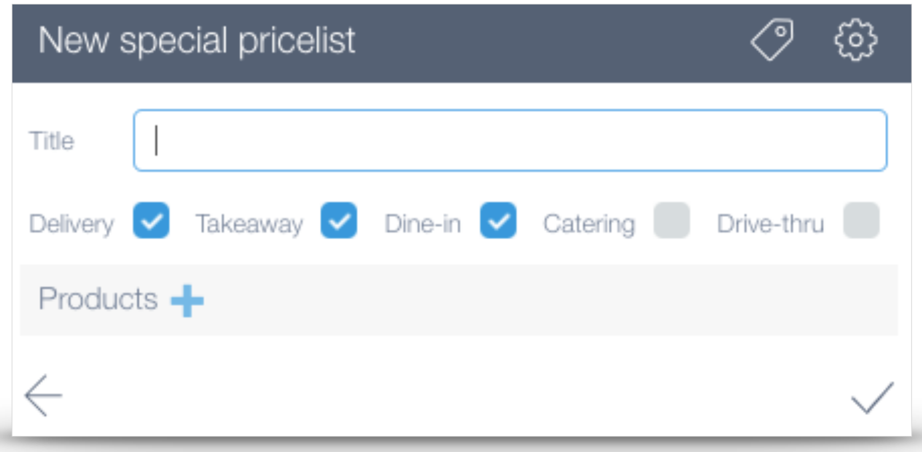
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Products Category** where you will find the **Products app** inside.



3. Launch the **Products app,** select the **Special Pricelist tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the Special Pricelist.



4. You should fill in the following sections:

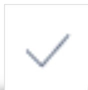


- **Title** – Add a title for the pricelist (it is not visible anywhere on the website).

- **Delivery Method** – Select the delivery method which you would like to apply (eg. Takeaway). You can choose more than one delivery method.

- **Products** – Add the products that fall into this special pricelist and set the price for each.
  See how to manage products

5. After creating a new special pricelist, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



Note: You do not need to make a pricelist for each delivery method. If the available methods for a store are eg. Delivery & Takeaway, then creating a pricelist corresponding to Takeaway automatically separates the price lists of the two methods, as follows: The prices that have been passed to the products in the first tab (Products) correspond to Delivery and those that have been passed to the special pricelist, correspond to Takeaway.

CMS

Managing Content on the Website

Learn about the basics of managing content and website customization for your online ordering system.

Add Content to the Website

Add new web pages to organize the content on your website and attract customers' attention.

See how to add content to the website

Add Photos to the Website

You can add photos / banners to different zones on your website. You can even create a slideshow to present your delicious dishes! Make your customers look forward to your delivery!

See how to add images to the website

Create Forms & Checklists

Dynamically create Customer Surveys for collecting customer data, customer feedback, internal staff recommendations and more. Also, with checklists you can define your daily processes and have your staff follow the checklists to make sure everything is done according to your business guidelines.

See how to create forms & checklists

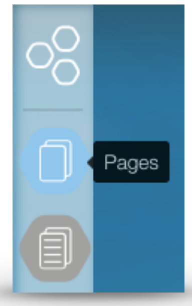
Web Page Categories Management (Pages app)

You will find the main web pages categories created by the Fimble team. Then, you should create sub-categories within the categories which relate exclusively to the website structure "building" in Fimble. Categories and sub-categories help you define the places of your website where you can add your content.

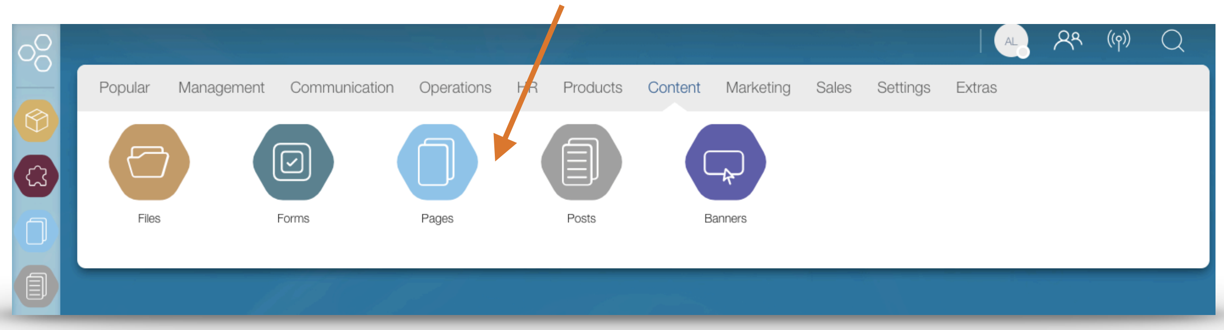
Creating / Editing a Sub-Category

The sub-categories have the form: “Core | Home, Sub footer | Privacy Policy, Footer | Information”, etc. As a good practice you should not delete them.

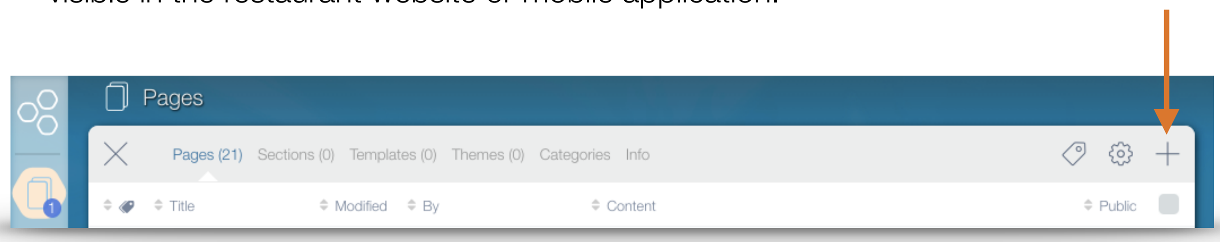
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Pages app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



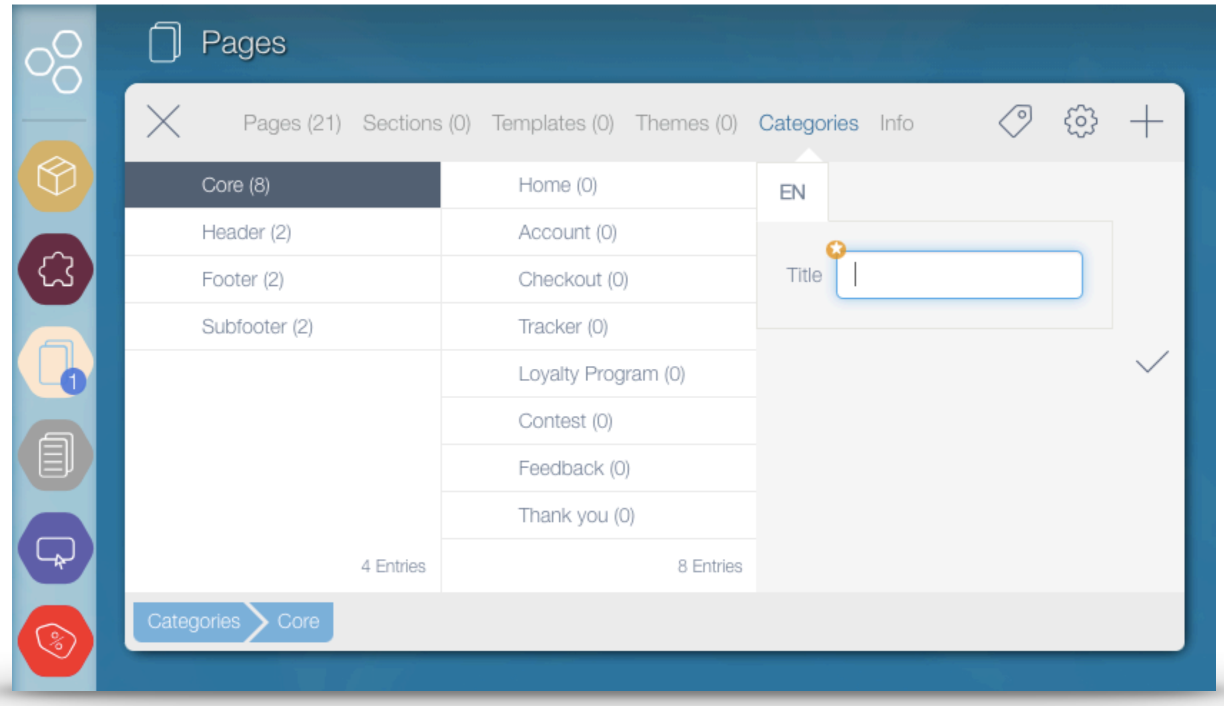
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Pages app** inside.



3. Launch the **Pages app,** select the **Categories tab,** choose one main category and press the “+” icon to add one or more sub-categories. It will open a new form where you are able to fill in the required fields for the sub-category, otherwise it will not be visible in the restaurant website or mobile application.

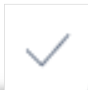


4. You should fill in the following section:



- **Title** – Add the sub-category title for each language you have in the website (eg. EN: Terms / EL: Όροι & Προϋποθέσεις, etc.).

5. After creating / editing a new category or subcategory, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



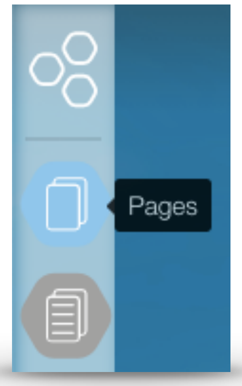
Web Page Content Management (Pages app)

In Fimble admin you can easily manage pages of your website. See how to add new pages, how to manage them, and how to upload their photos. With these options you will make your website more attractive and increase online sales in your restaurant.

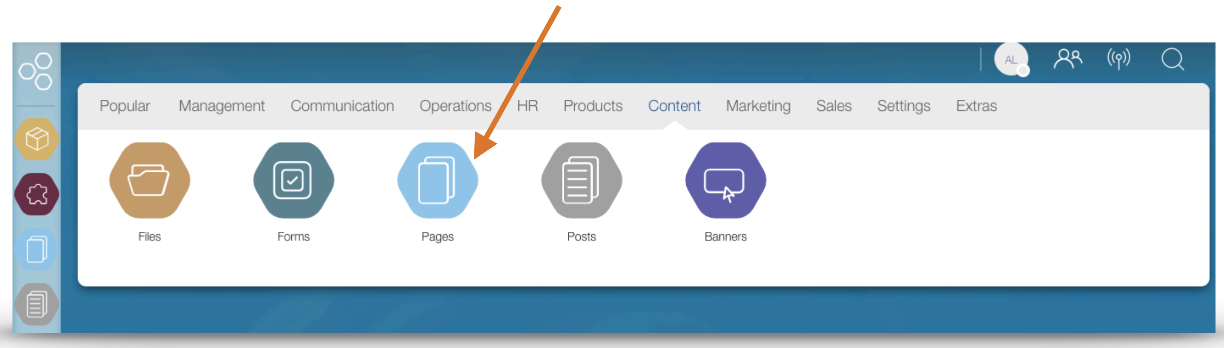
Adding / Editing a Page

Below are the steps to easily add new pages to the restaurant's website. If you do not find a page in fimble's Pages application, this means that it is either created in the Posts application or it is a combination of Pages and Posts applications like the Career page for example.

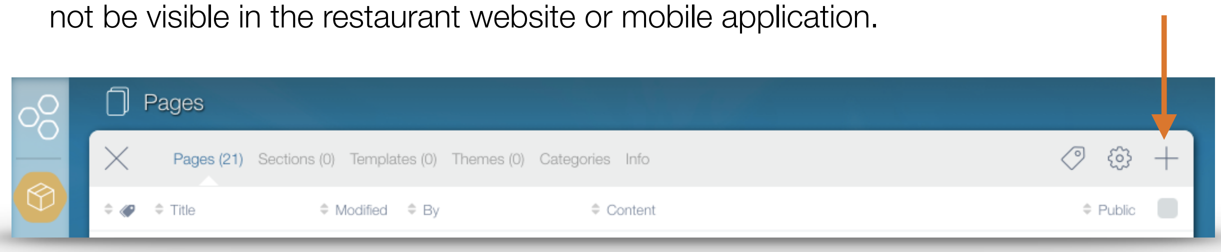
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Pages app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Pages app** inside.

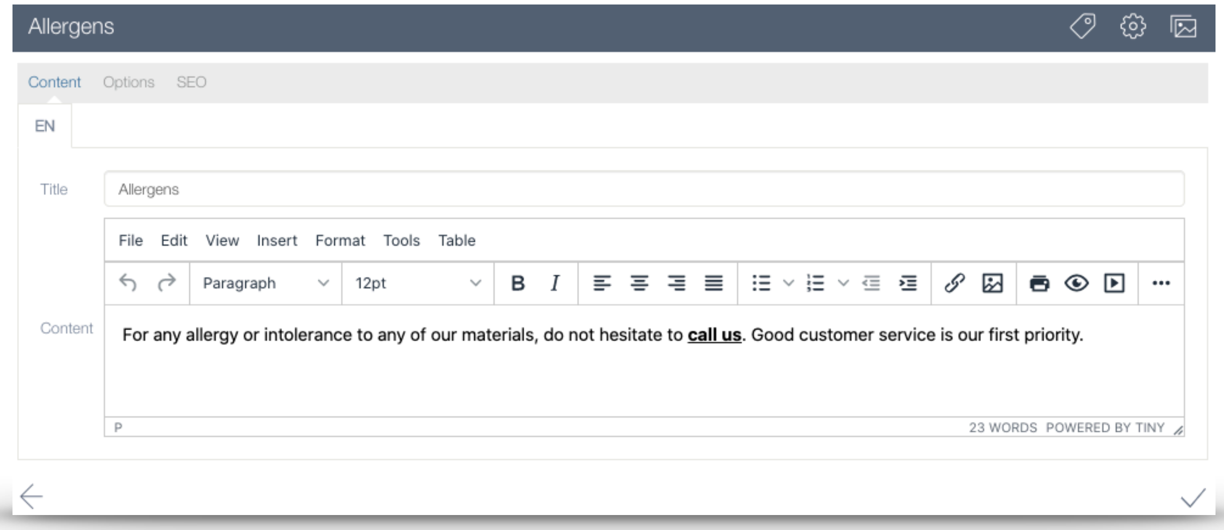


3. Launch the **Pages app,** select the **Pages tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the page, otherwise it will not be visible in the restaurant website or mobile application.



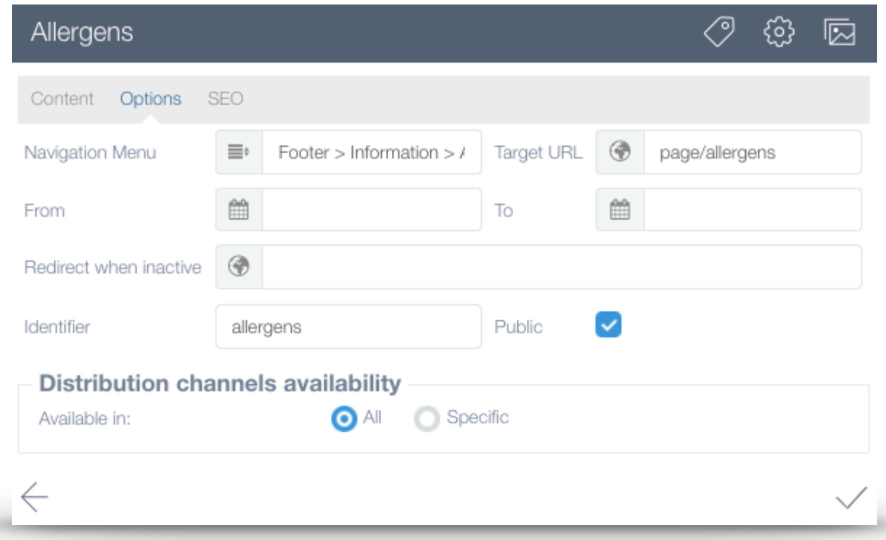
4. You should fill in, among others the following sections:

Sub Tab: Content



- **Title** – Add the page title for each language supported in your website.
- **Content** – Add the page content for each language supported in your website.

Sub Tab: Options



- **Navigation Menu** – Select under which navigation menu option this page will be displayed.
  See how to manage web page categories

- **Target URL** – Set the URL to which you want this page to redirect the user to. If it is an external page, set the whole url. If it is a page on the website set the part of the url after the domain (eg. the target URL for the domain.com/page/terms-and-conditions would be page/terms-and-conditions).

- **From** – Select the date when this page will be published.

- **To** – Select the date this page will stop being published.

- **Identifier** – This field is used to identify on which page / section the page's content will be displayed. Each page on the website has a specific unique identifier hard coded which should match the identifier of the corresponding page through the Pages application. This field should not be changed on editing.

- **Public** – Once a page is fully created you check Public so it appears in the predefined distribution channels.

- **Distribution Channels Availability** – Select the channels where you want this page displayed (eg. if you want it displayed in all your channels you should select "All", but if you want it displayed only on the website and not on the mobile applications you should select Specific and below select "POS").

5. After adding / editing a new page, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Post Categories Management (Posts app)

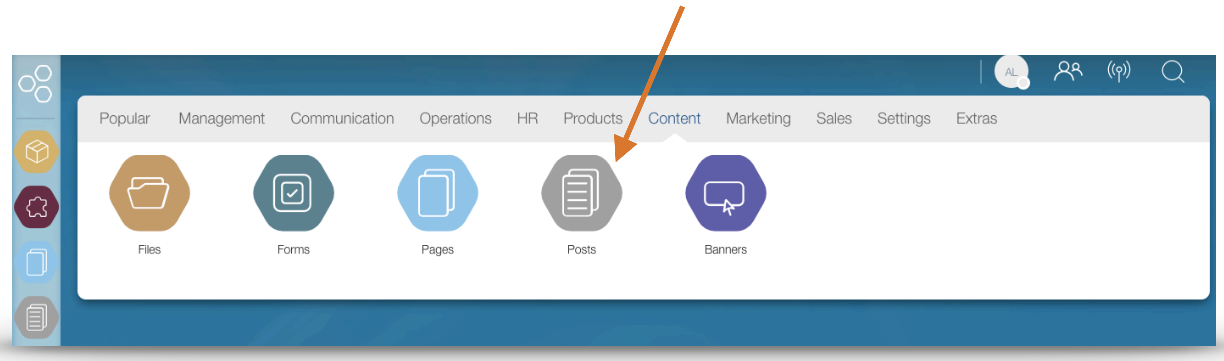
In the Fimble system you can create categories which relate exclusively to some specific custom pages or other small content parts of your website structure that need some extra type of content. Categories and subcategories help you define these places of your website where you can add this extra piece of information. For example in the fimble website structure there are some web pages like the Careers page that are built using a combination of Pages and Posts applications.

Creating / Editing a Category

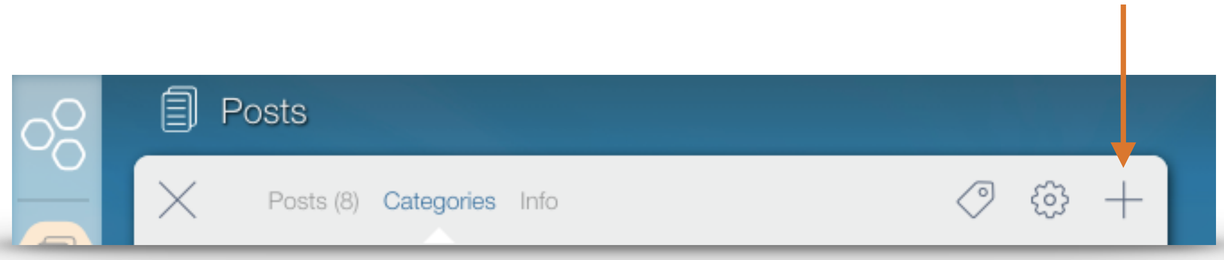
The categories have the form: “Careers | Job Openings, Kiosk | Cancel Order, etc.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Posts app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

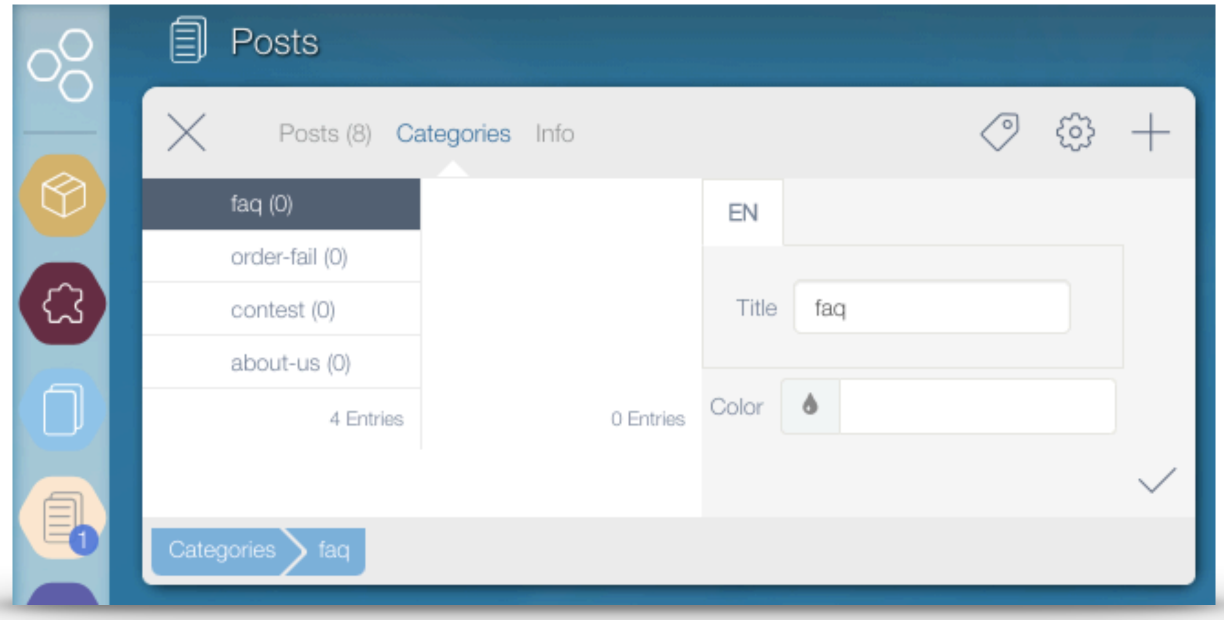
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Posts app** inside.



3. Launch the **Posts app,** select the **Categories tab,** and press the “+” icon to add one or more categories. It will open a new form where you are able to fill in the required fields for the category, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in the following section:



- **Title** – Add the category title for each language you have in the website (eg. EN: FAQ / EL: Συχνές Ερωτήσεις, etc.).

5. After creating / editing a new category, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Creating / Editing a Sub-Category

After creating the categories, you should create sub-categories within the categories, which also appear in the website.

The sub-categories have the form: “About Us | History Timeline, Careers | Job Postings, etc.

1. You should fill in the following sections:

   - **Title** – Add the sub-category title for each language you have in the website (eg. EN: Careers | Job Postings / EL: Εργασία | Ανοιχτές Θέσεις Εργασίας, etc.).

2. After creating / editing a new subcategory, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Post Management (Posts app)

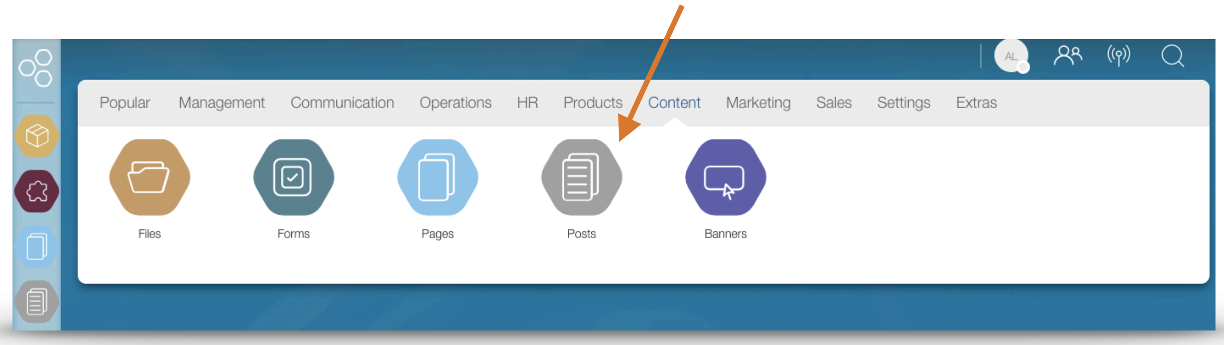
In the Fimble admin you can easily manage pages of your website. See how to add a new post, how to manage them, and how to upload their photos.

Adding / Editing a Post

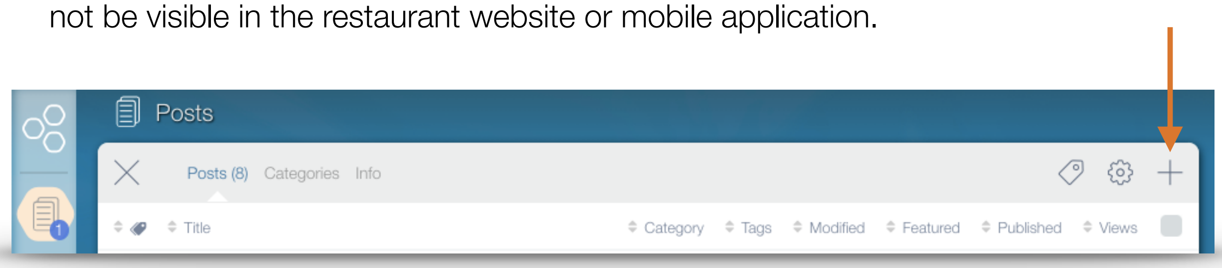
See below the steps to easily add pages to the restaurant's website. Here you will find some web pages like for example the Careers page that are built using a combination of Pages and Posts applications. Fimble team can help you build the right web or mobile pages by providing some pre-made web pages and categories templates that you will find as predefined in fimble's CMS applications.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Posts app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Posts app** inside.

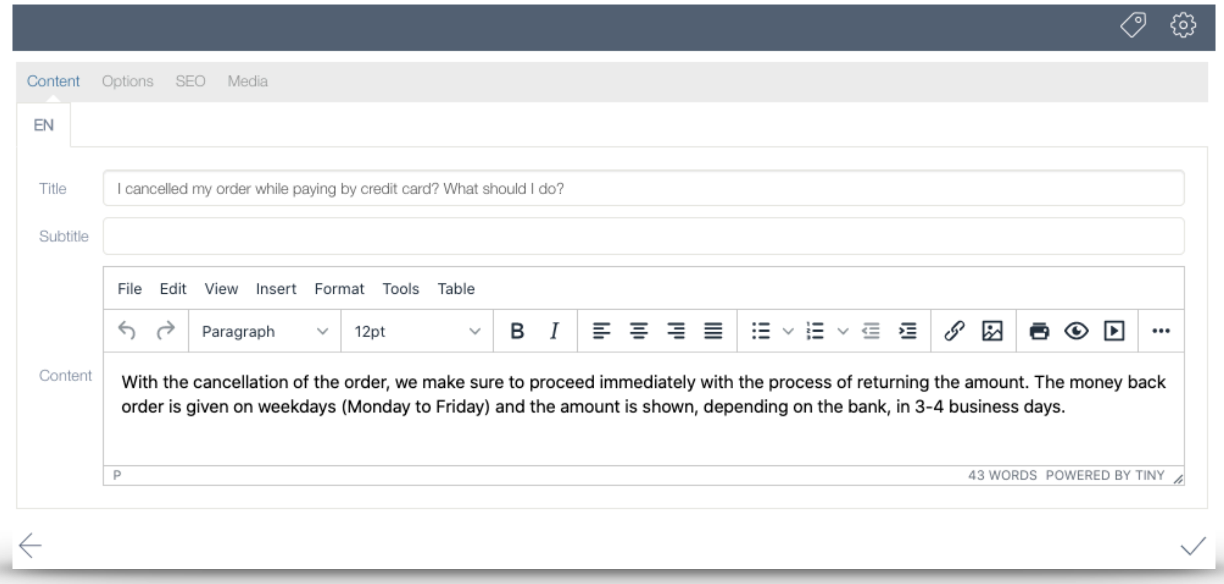


3. Launch the **Posts app,** select the **Posts tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the post, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in, among others the following sections:

Sub Tab: Content

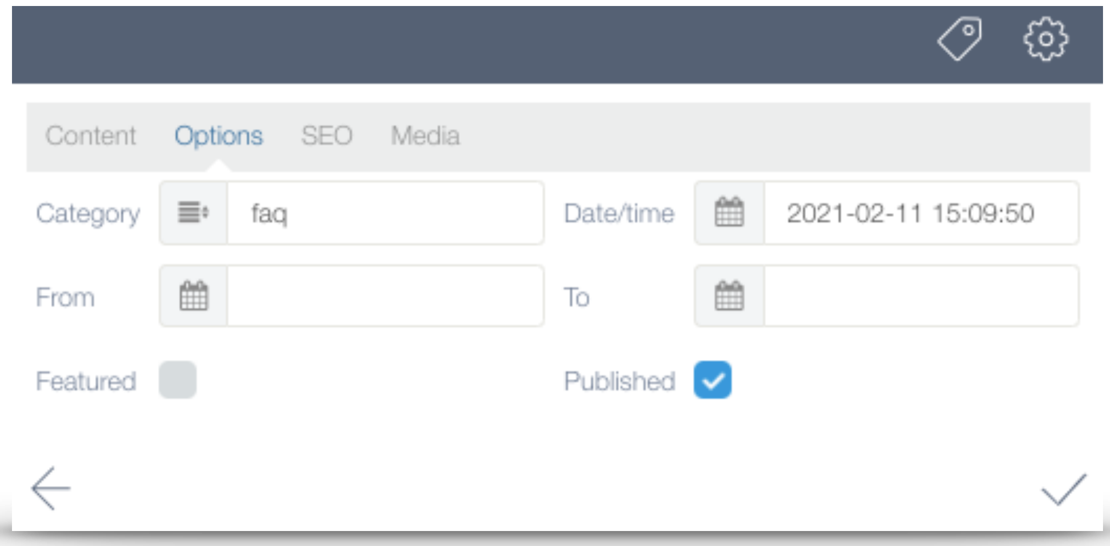


- **Title** – Add the post title for each language supported in your website.

- **Subtitle** – Add the post subtitle for each language supported in your website.

- **Content** – Add the post content for each language supported in your website.

Sub Tab: Options



- **Category** – Select the category under which this post will be displayed.
  See how to manage post categories

- **Date / Time** – Set the date / time you want to be displayed as the published date / time (this works for blog/articles where this kind of information is displayed).

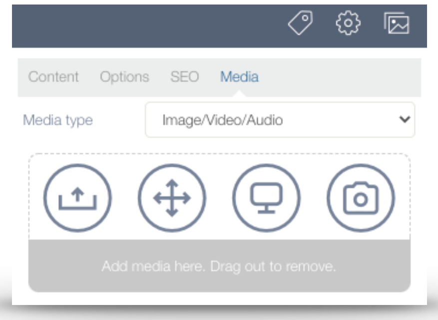
- **From** – Select the dates when this page will be published.

- **To** – Select the dates until this page will be published.

- **Featured** – In case of use, mark the post as a featured post (eg. in a blog page the featured posts could be displayed first and / or in a different color or with a badge.

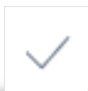
- **Published** – Check Published if you want the post to be published.

Sub Tab: Media



- **Media Type** – Choose the media type you would like to add, and they are also supported by your website structure.

- **Media** – Add photos of your post by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photos you uploaded, will be displayed on the respective channels (eg. Website, mobile apps, etc.).



5. After adding / editing a new post, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Editing the Information displayed on the Contact page

The contact tab is undoubtedly one of the most important places on your restaurant's website. Make sure it contains relevant and current information.

Editing the Information displayed on the Stores page

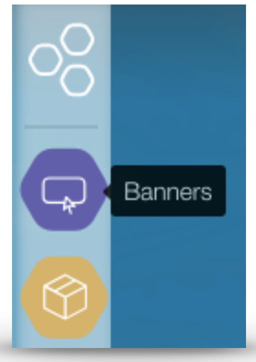
Adding Photos to your Website (Banners app)

Fimble allows you to add your web pages or product photos either by uploading them to the File Manager at once or directly within the pages or products apps.

You will find the main web page banner zones created by the Fimble team. Then, if you would like to create extra banner zones which relate exclusively to the website structure "building" in Fimble, you should contact us and we will help you through this process. Zones help you define the places of your website and mobile application where you can add your photos. Keep in mind that when you add a new zone, we will need to connect it to the preferred place in the website or mobile application in order to work.

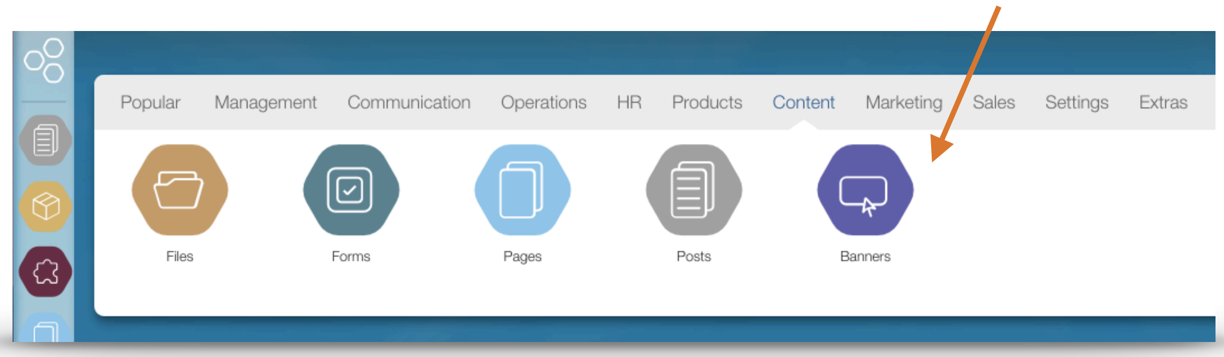
Adding / Editing Web Page Banners

See below the steps to easily add banners to the restaurant's website or mobile application.

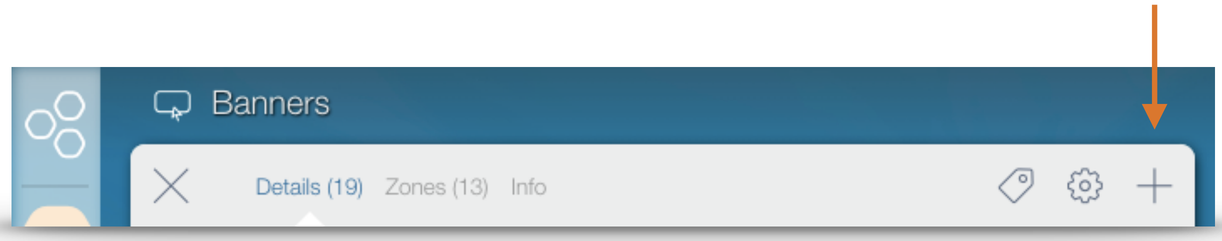


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Banners app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Banners app** inside.



3. Launch the **Banners app,** select the **Details tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the new banner, otherwise it will not be visible in the restaurant website or mobile application.



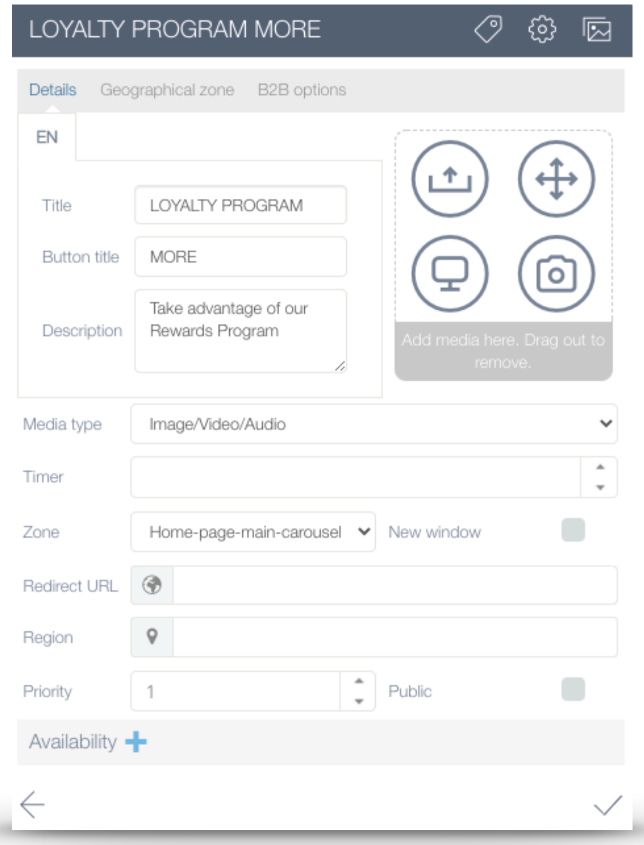
4. You should fill in, among others the following sections:

<u>Sub Tab: Details:</u>

- **Title** – Add the banner title for each language supported in your website. Title appears on the top of the banner's modal with bold letters.

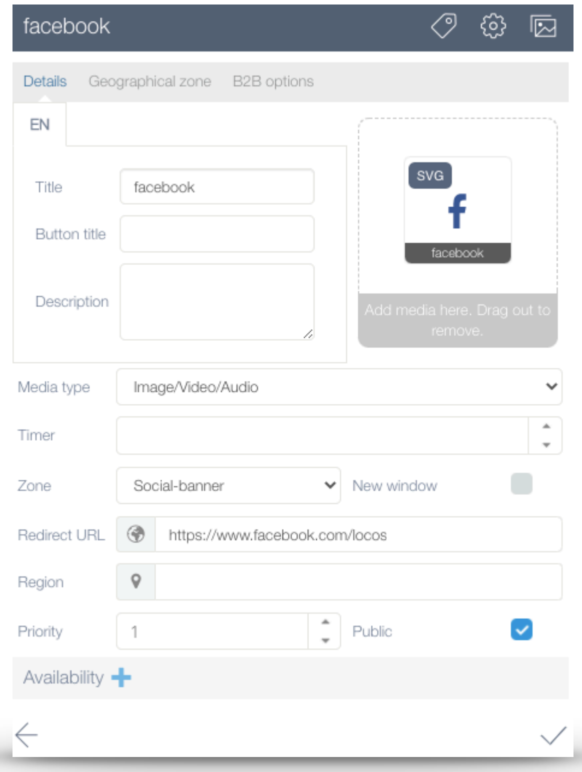
- **Button title** – Add the button title for each language supported in your website.

- **Description** – Add the description for each language supported in your website.



Adding Social Media Profiles to your Restaurant's Website (Banners app)

There are also other kind of banners like **social banners**, which do not show title or description, you only need to add the logo of a social (eg. Facebook) and add your Facebook's page URL in order to add your social media accounts in the footer of the website.



- **Media Type** – Media type is used to add the prerequisite data that is needed to create a banner. For example, if you want to add an external url, you will have to select "Webpage URL" and add the link in the field. You can follow from the following choices:
  - Image / Video / Audio
  - Youtube URL (A YouTube video will be displayed instead of the banner)
  - Vimeo URL (A Vimeo video will be displayed instead of the banner)
  - External Media URL (For example Facebook button which moves you to a Facebook page if clicked)
  - Web page URL (For example an external URL page which moves users to your location through Google Maps)

- Custom code (If your needs are more demanding or special, fimble's team can implement further functionalities. Contact us to see how we can do something specific for you.

- **Media** – Add your media file by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The media file you uploaded, will be displayed on the respective channels (eg. Website, mobile apps, etc.).

- **Timer** – Select how much time the banner will be displayed on the screen before it changes to the next one (carousel feature).

- **Zone** – In zone dropdown you can see all the zones that were added by default or the ones you added. Select where you want to see the banner appearing.

- **New Window** – Select this if you want the banner to open in a new browser window. Applies only for some types of media.

- **Redirect URL** – Set the URL in order to redirect the customer after pressing the banner or the button.

- **Priority** – Set the priority between the public banners you have added. Which one should appear first, what is the second banner and so on.

- **Public** – Check this if you want your banner to be public or not.

- **Availability** – Select the days of the week that you want to see your banner public on your website.

5. After adding a new banner, to SAVE the record click the CHECK mark on the bottom right corner. Then you should get in touch with us to make the new banner public in your website and / or mobile application. In order to close the form without saving, click the Arrow on the bottom left corner.

Adding images and tags in Gallery page (Banners app)

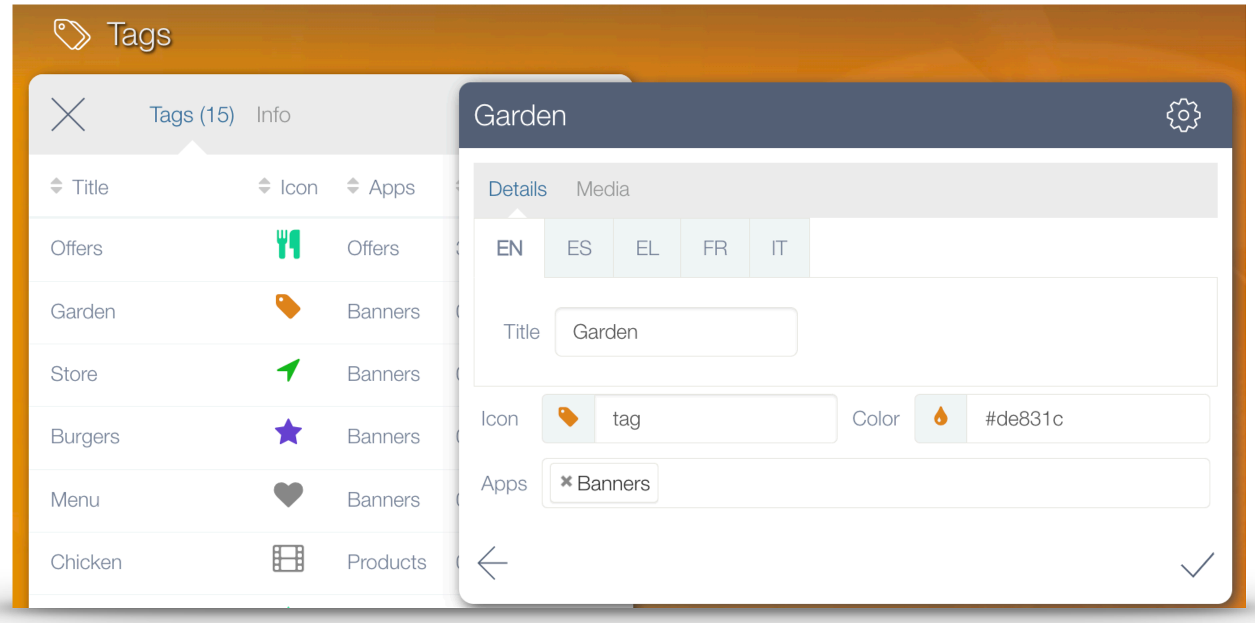
In order to add images in your gallery page you just need to follow a few simple steps.

1. Open the **Banners app** and click the '**+**' button to add a new record.
2. You should fill in, among others the following sections:
    - **Title** — The title of the image. This title will be displayed inside & outside the image.
    - **Description** — Add the description for each language supported in your website. This description will be displayed inside & outside the image.
    - **Media** – Add your media file by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The media file you uploaded, will be displayed on the respective channels (eg. Website, mobile apps, etc.).
    - **Media type** — Select from the dropdown file the media type: Image/Video/Audio
    - **Priority** – Set the priority between the public banners you have added. Which one should appear first, what is the second banner and so on.
    - **Zone** — Select the zone Gallery-banner
    - **Public** — Click the public checkbox if you want this image to be shown in the gallery page.

Tags (filters) in gallery page

In Fimble you can create a variety of different filters (tags) for your gallery images such as, Latests, Trending, etc.

1. Open the **Tags app** and click the '**+**' to create a new record.
2. You should fill in the following sections:



- **Title** — Add the title you wish to be displayed on the website (one for each language that is available on your website).

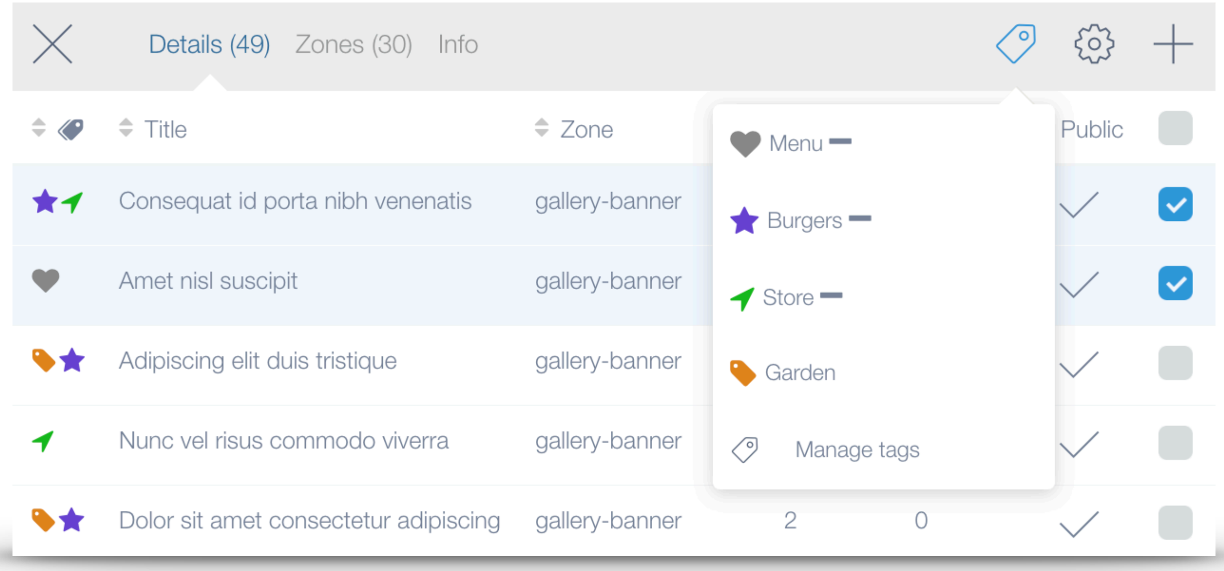
- **Icon** — Select one of the available icons that suites in each case.

- **Color** — Select the color of the filter.

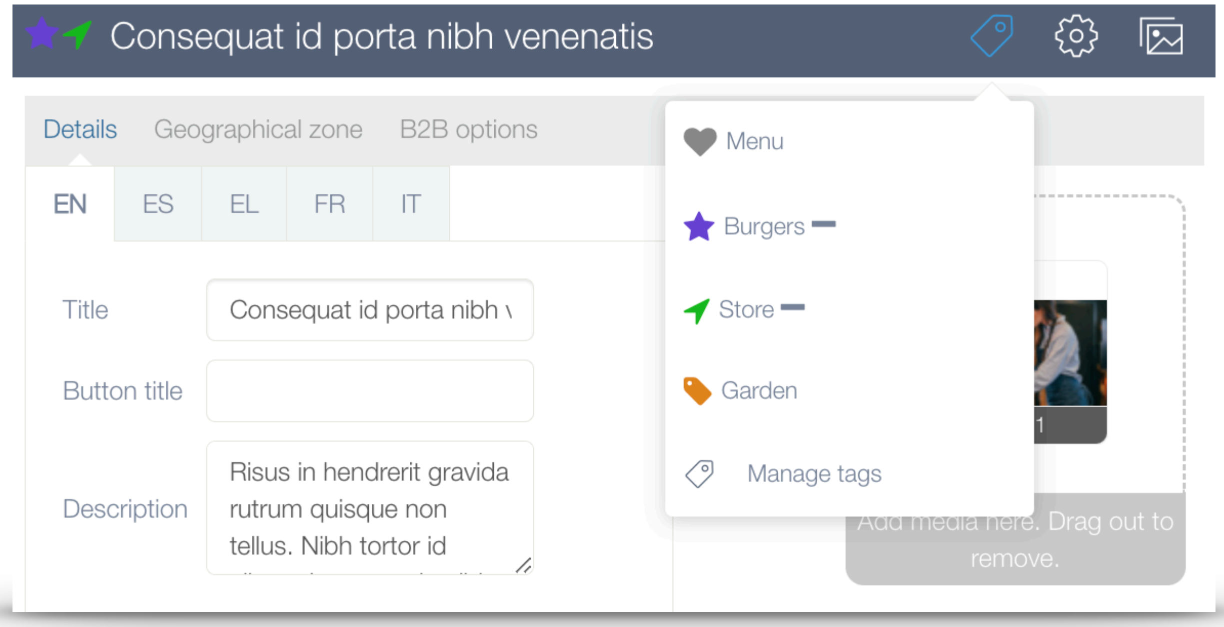
- **Apps** — Match this tag with the Banners app.

3. Once you create the tags you need to return to the Banners app and match the banners records with the respective tags. Keep in mind that you can match a banner with more than one tag (e.g. Latests, Trending, etc).

   - **Mass selection** — Select the banners you want by clicking the checkboxes , go to the tag button and assign the tag(s).



   - **Single selection** — Open a banner and go to the tag button and assign the tag(s).

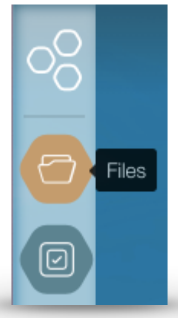


   - **Remove tag** — To remove a tag, follow the above steps and just click the tag you want to be removed from a banner or a plethora of banners.

Uploading Files to File Manager (Files app)

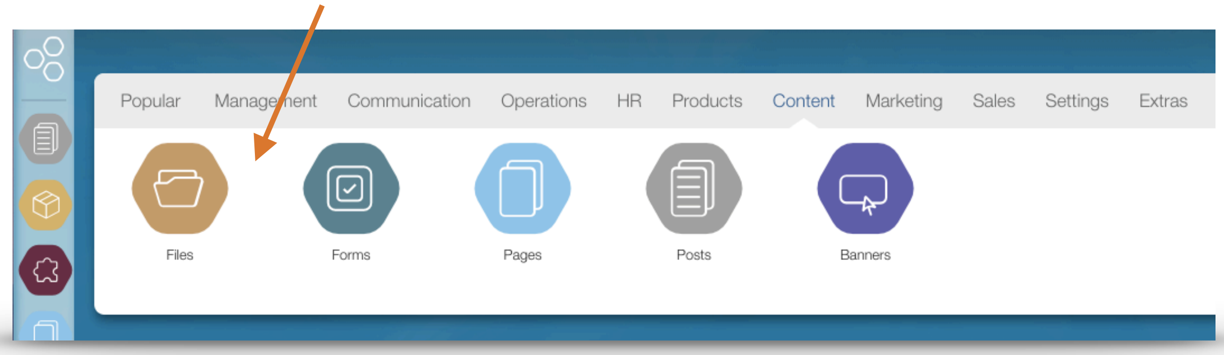
Fimble allows you to upload and manage multiple files at once with storage in different folders, simplified sharing functionality with specific privileges for each access level and drag and drop method for easy movement of the files within folders. The images files can be later attached to specific web pages and / or products, among other places.

Uploading Files



1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Files app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are



able to select the **Content Category** where you will find the **Files app** inside.

3. Launch the **Files app,** and press the "+" icon. It will open a new dropdown menu where you are able to choose if you want to create a new folder or to upload files.

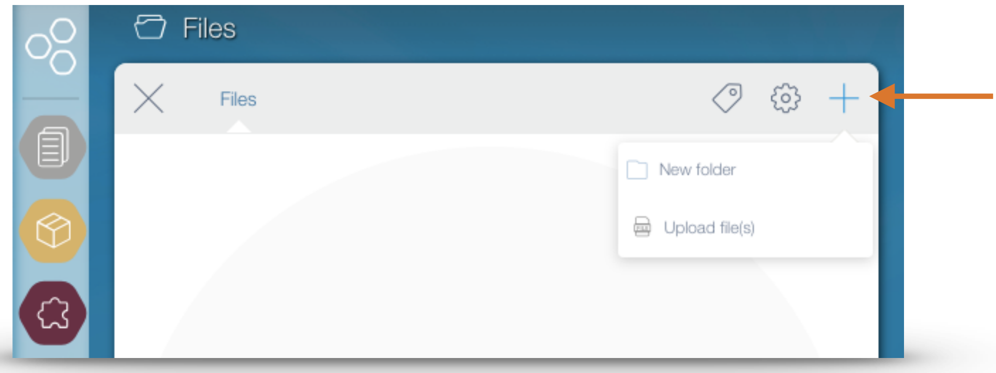


Image Sizes Recommendations for your Website

Fimble gives you the opportunity to make your web page not only useful and easy to navigate within, but also to make it visually attractive to you and your customers. To be sure that your content looks appealing check the recommended sizes and formats of images that you upload to your restaurant's website.

- **Logo** – Vector or High Resolution PNG
- **Image Slider** – 1920 x 1000 JPG
- **Product & Gift** – 1000 x 765 JPG
- **Offer** – 1024x1024 JPG - text in the middle

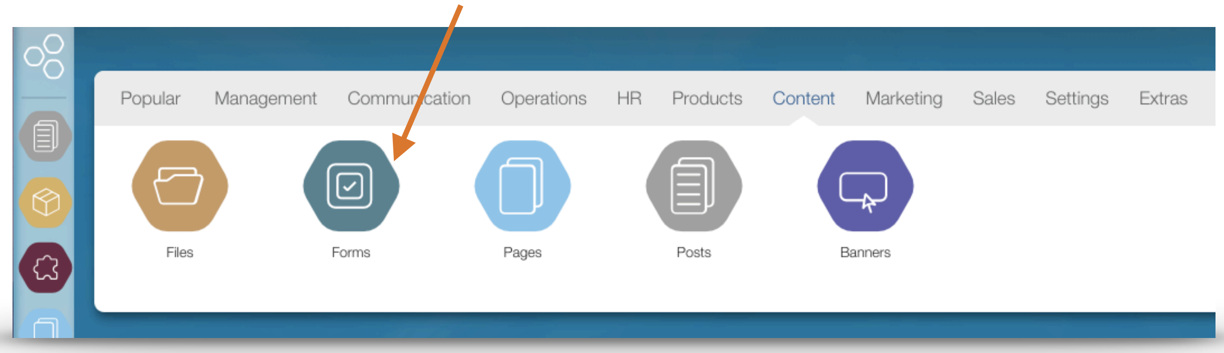
Creating Forms & Checklists (Forms app)

In Fimble admin you can easily create and manage all types of forms including web forms, surveys, data acquisition forms, customer profiling forms or employee tests, etc. In order to create a form, you will first need to create the elements of that form.

Creating Form Elements

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Forms app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

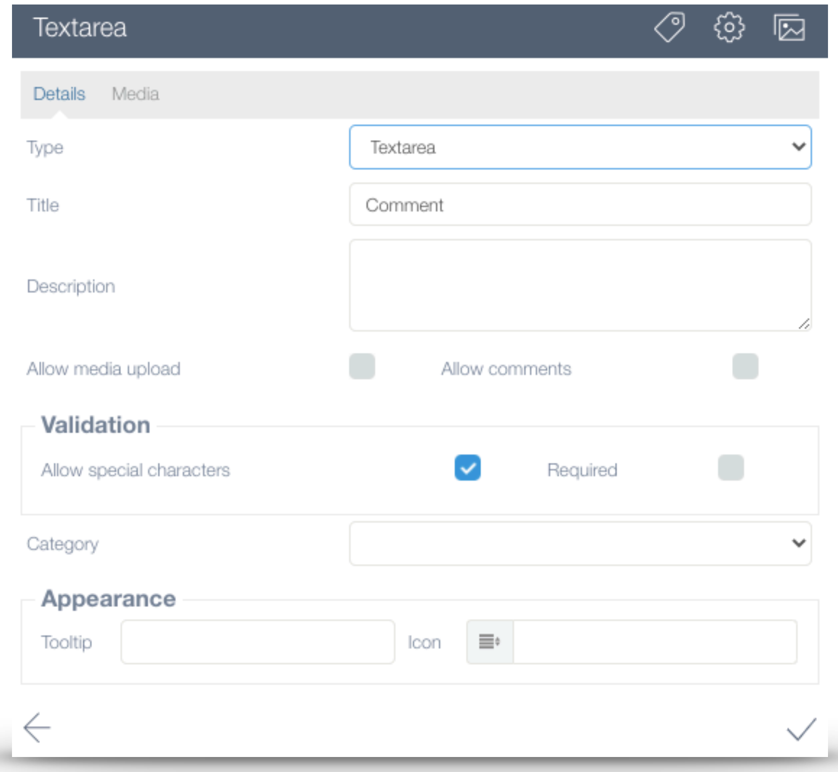
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Forms app** inside.



3. Launch the **Forms app,** select the **Form Elements tab** and press the “+” icon. It will open a new form where you are able to fill in the required fields for the new form element.

4. You should fill in, among others the following sections:

Sub Tab: Details



- **Type** – This is the element type. For example “textfield” which is just a field to type a text. Below you will find all the element types that exist in the platform:
  - Textfield: A text field where you can enter text. Used to answer questions like: Enter your name, Enter your phone number etc. **There is a restriction** about the limit of characters of the text.
  - Text area: The difference between the textfield and the text area is there is **no restriction** on the amount of text written.
  - Radio Button: Provides you the ability to list more than one choice, of which **only one** can be selected. For example “Let us know which is the best product category in the restaurant” 1. Meat, 2. Pizza, 3. Burger, 4. Sushi.
  - Checkbox: The difference between the checkbox and the radio button is that if you choose the checkbox option for a question, the user / customer can select **more than one** answers. For example “When do you usually order food” 1. Morning, 2. Noon, 3. Afternoon, 4. Evening. The answer could be 1 and 2 for example.

- Date: This is a type that a user / customer can type a date as an answer to your question.
- File upload: This is a type that should be filled with a media by the user / customer, eg. photo, video, etc.
- Video URL: This is a type that should be filled with a video url.

- **Title** – Add the title of the element. For example “Enter your name”, this element will probably be created by using a textfield and you expect the user to type their name in the field.

- **Description** – Add the description of the element. Description works like a placeholder of the field (eg. Choose your favourite product category).

- **Allow Media Upload** – This should be checked if you want to allow users / customers to upload a file as an answer to a question. For example you may want your candidates for a job position to upload their CV.

- **Allow Comments** – This should be checked if you want to allow users / customers to make a comment to a question.

- **Validation**
  - Allow special characters: Choose if the field will be 1. characters only, or 2. Integer, and 3. Decimal by selecting to allow the special characters or not.
  - Required: Choose if this field will be required for the submission of the form or not.
  - Accept multiple answers as correct: Select this if you would like to allow the users / customers to give more than one answer to a question.

- **Minimum Characters** – Add the minimum characters that can be entered in a field.

- **Maximum Characters** – Add the maximum characters that can be entered in a field.

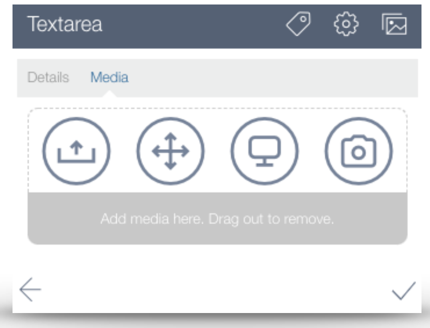
- **Tooltip** – Tooltips are text labels that may contain brief helper text about the elements function to help user understand what is needed.

In some element types there is one more required field to complete. For example in radio button or the checkbox element type you need to define the possible answers (eg. Yes or No or Maybe). In this case you should create the associated element options below:

- **Relate form element option with**
  - Element Option: Associate the element options with an element type like for example the radio button should have multiple answers in one question.
  - Correct: Check this if you want to tell the user / customer which is the correct answer in a question.

<u>Sub Tab: Media</u>

- **Media** – Upload the icon of the element, if applicable, by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app.

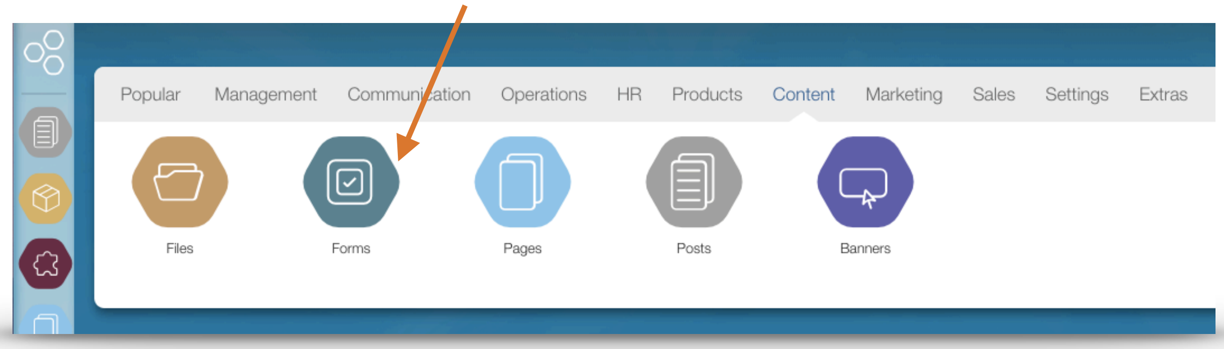


5. After creating a new form element, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

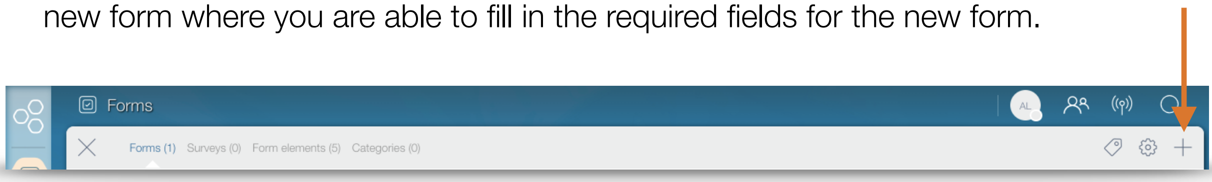
Creating Form

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Forms app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Content Category** where you will find the **Forms app** inside.



3. Launch the **Forms app,** select the **Forms tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the new form.

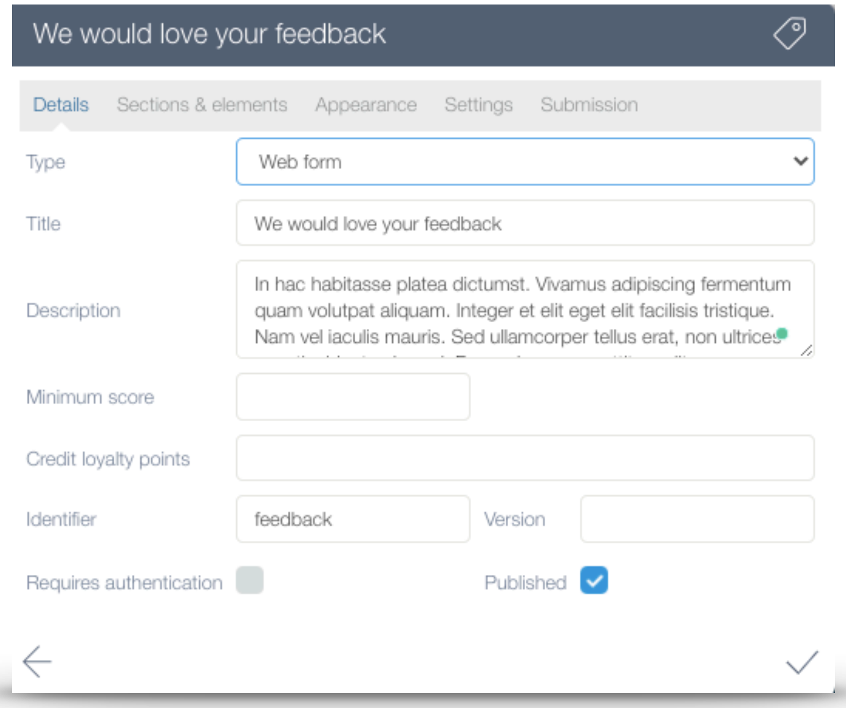


4. You should fill in, among others the following sections:

<u>Sub Tab: Details</u>

- **Type** – This is the type of the form. You can choose between the below form types:
  - **Web Form**
  - Survey
  - Review
  - Profiling
  - Ticket

In this guide we will be focusing on the most common used form type, the web form. Similarly you can build the other form types with the only exception some different fields that may be used.



- **Title** – Add the title of the form, for example "Favourite food questionnaire" (it will appear at the top of the form page).

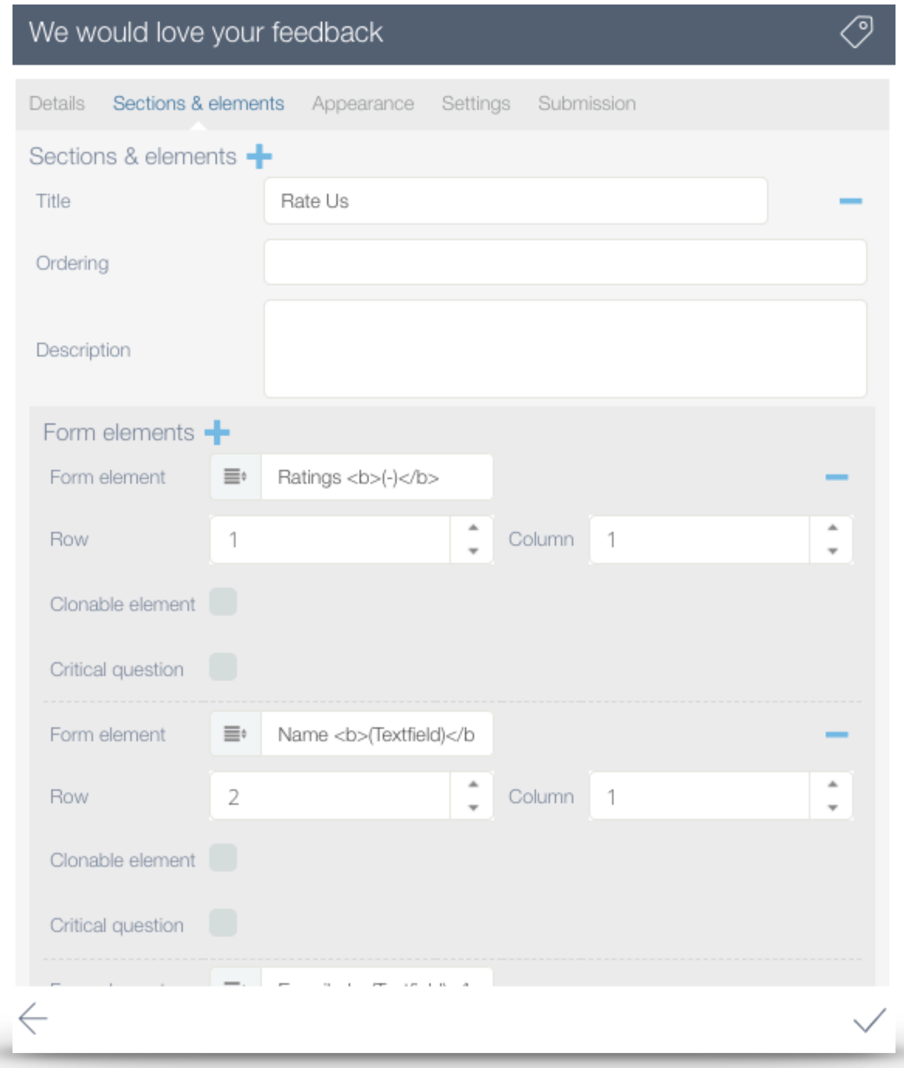
- **Description** – Add the description of the form. The description will be under the title, and it could be 1-2 sentences describing what the form is all about.

- **Identifier** – This field is used by the system to identify on which page / section the form's content will be displayed. Each form on the website has a specific unique identifier hard coded which should match the identifier of the corresponding form through the Forms application. This field should not be changed on editing.

- **Published** – Check this checkbox if you want the form to be public.

Sub Tab: Sections & Elements

If you press the "+" icon in Sections & Elements section, a nested section will appear with the below details to fill in along with their form elements you created before, that you are able to add to the section.



- **Sections & Elements**
  - Title: The title of the section (eg. Personal Details).
  - Ordering: Select in which ordering the section will be presented among the others.
  - Description: It is not required but if you would like or if a form setup requires a description you can add it here.

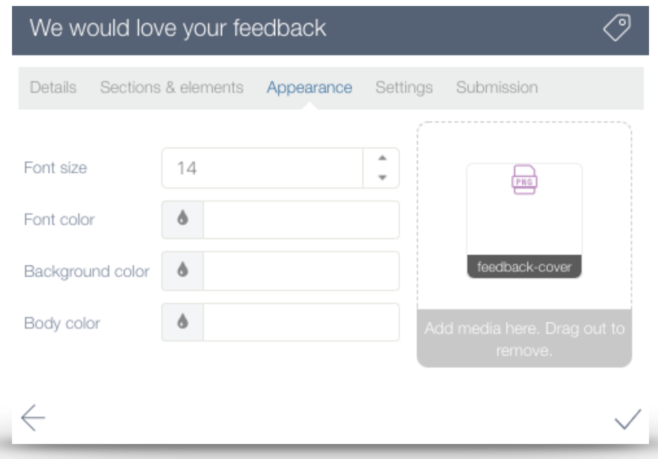
- **Form Elements**
  - Form Element: Select any form elements needed that will be used to build each of the sections of the form. The form elements should have already been created.
  - Row: Select in which row the form element will be presented within the section of the form.

- Column: Select in which column the form element will be presented within the section of the form.
- Clonable Element: When you answer the form you can also add another element of the same type. Eg. What equipment do you have? (and I have a dropdown, so eg. I select the first iPhone and press + to select another eg. iPad.
- Critical Question: Select this if that is a critical question. For example, in Training when you do an evaluation you can allow 3 wrong answers but you want to see later if they made a mistake in a critical field.

  See how to manage form elements

Note: You could split the form sections like 1. Personal details, 2. Favourite food, 3. Questionnaire about our store, etc. Or you can also put everything in one section. It is up to you how you prefer to set up the form to be visually better to your end users. You can create as many sections and form elements as you wish.

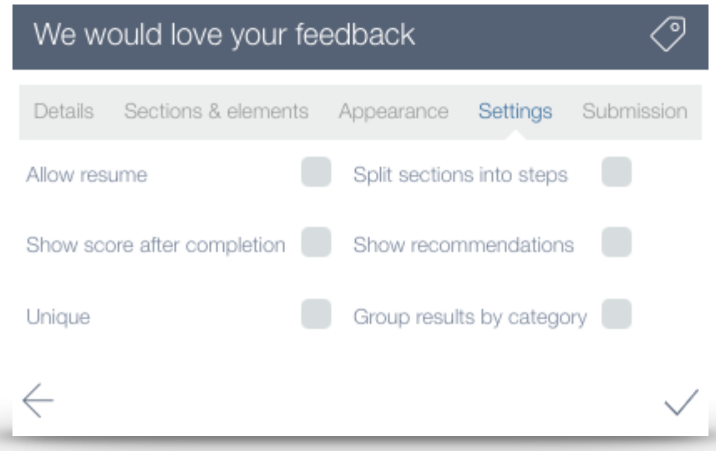
Sub Tab: Appearance



Here you are able to add some basic styling to your form. You can choose between the below styling options:

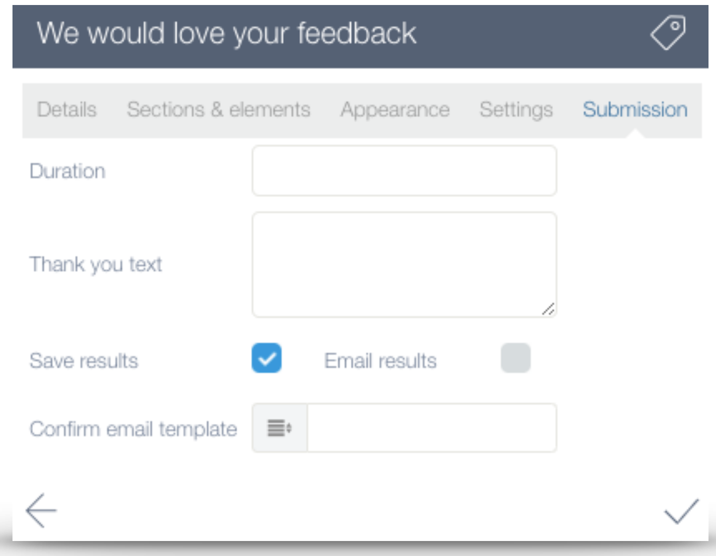
- **Font Size** – Choose the font size that your form will be using.

Sub Tab: Settings



In order to show different sections in a form, you need to enable the “Split sections into steps”.

Sub Tab: Submission



- **Thank you text** – Add a thank you text that will appear after the form submission.

- **Save Results** – If you want to save results on the Feedback application, select this checkbox.

- **Email Results** – If you want to receive the results on a specific email account, select this checkbox.
  - Sender Account: Choose a sender's email account (you need to create it as a channel in Gateway application).
  - Recipients: Choose the recipients that will receive the results of the submitted form.

- **Confirm Email Template** – Select the email that will delivered to the person after the filled in the form.
  See how to manage email templates

There are also some other fields available on the web form that are rarely used, but available.

5. After creating a new form, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner..

Restaurant Management

Managing Location Settings (Locations app)

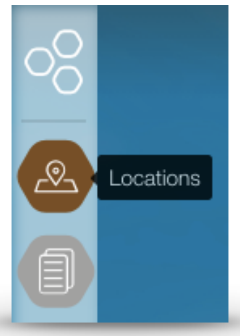
In Fimble admin you can use the locations application to add and manage your restaurant store(s).

Explaining the use of Stores

They appear on the "stores" page in your restaurant's website or mobile application as well as in the dropdown with the restaurant's locations if the customer selects the take away option. They are also used when the customer selects their address from the dropdown with their saved addresses at the start of the ordering process (delivery option).

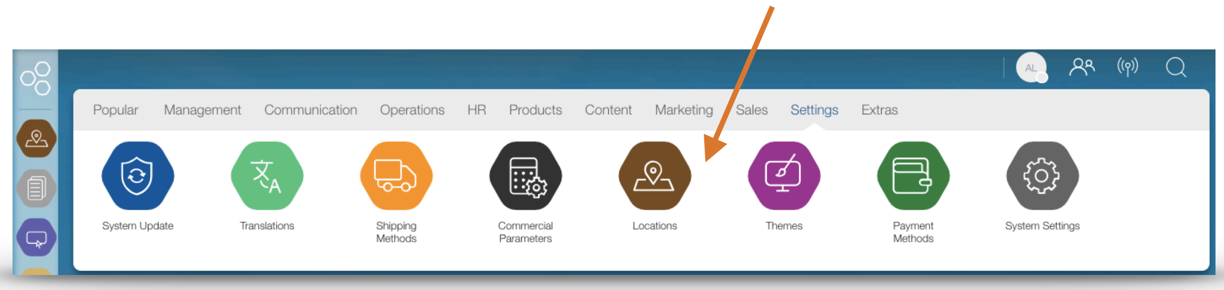
They are matched with service areas. When the customer logs into the website and starts the delivery ordering process, they can only add an address which is also served by a specific store and their service area.

Adding / Managing Location

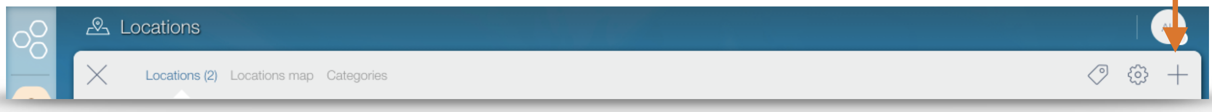


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Locations app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Settings Category** where you will find the **Locations app** inside.

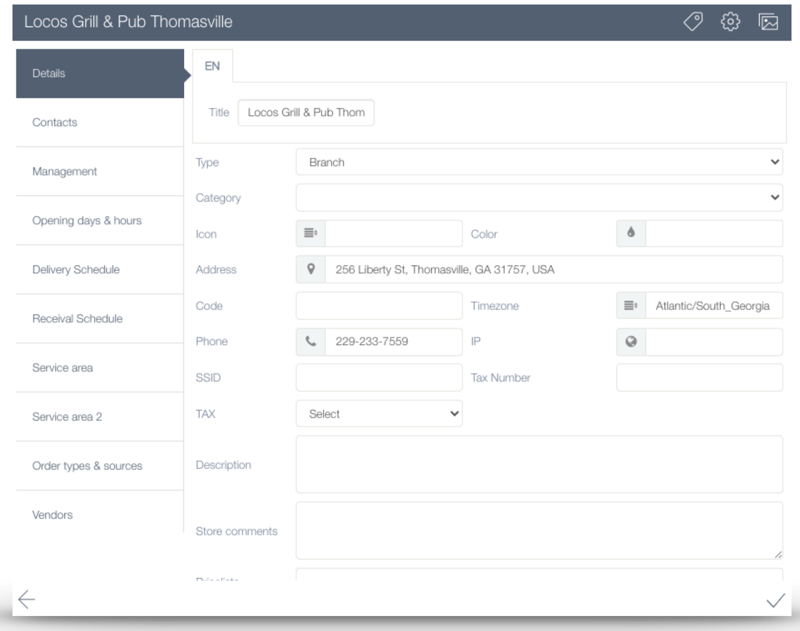


3. Launch the **Locations app,** select the **Locations tab** and press the “+” icon. It will open a new form where you are able to fill in the required fields for the location, otherwise it will not be visible in the restaurant website or mobile application.



4. You should fill in, among others the following sections:

<u>Sub Tab: Details</u>



- **Title** – Add the location title for each language supported in your website (eg. it can be your restaurant address).

- **Type** – Always select the Branch option here.

- **Icon & Color** – You can match the location with an icon & its color in order to distinguish it between other locations.

- **Address** – Add the physical location address of your store (start typing and then select the google autosuggest address). This will also be the starting point of its service area.

- **Timezone** – Select the store's country's timezone from the list of the available timezone options (ex. Europe/Athens (+03:00)).

- **Phone** – Add the phone number of your store.

- **IP** (Optional) – Add your store's static IP address if you have one.

- **SSID** – If you are using the Driver Assist mobile application, then you need to know about SSID. SSID is the "name" of your WIFI (eg. TP-Link—483920). This is used to automate some of the driver's actions. When the drivers return back to the store and get connected to the store's WIFI, they automatically take the "Available" status and you can assign the next orders to them that are ready for delivery.

- **VAT** – If you would like to set a default VAT value to the store, then all products assigned to this store will have this VAT applied on them.

- **Description** (Optional) – Add a description for your store.

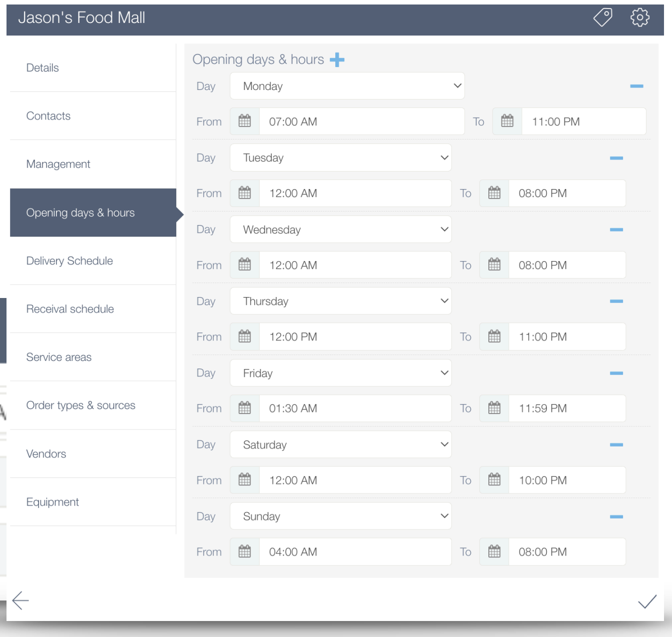
- **Store Comments** (Optional) – Add any comments you wish for your store.

- **Pricelists** – You can match the special pricelists you have created in the Products application in order to appear on a specific's store menu in a restaurant's website or mobile application.
  See how to manage special pricelists

- **Temporarily Closed** – Check this if you would like to set your store temporarily offline. It is used to close the store if something urgent happens for example blackout or if the store has no internet to receive the orders.

- **Allow Supplementary Orders** – Check this if you would like the store to allow the customers to place additional orders without a minimum order amount and / or without an extra delivery charge for them.

- **Public** – After you complete all the store's settings, check this if you would like your store to go live in your restaurant's website or mobile application.



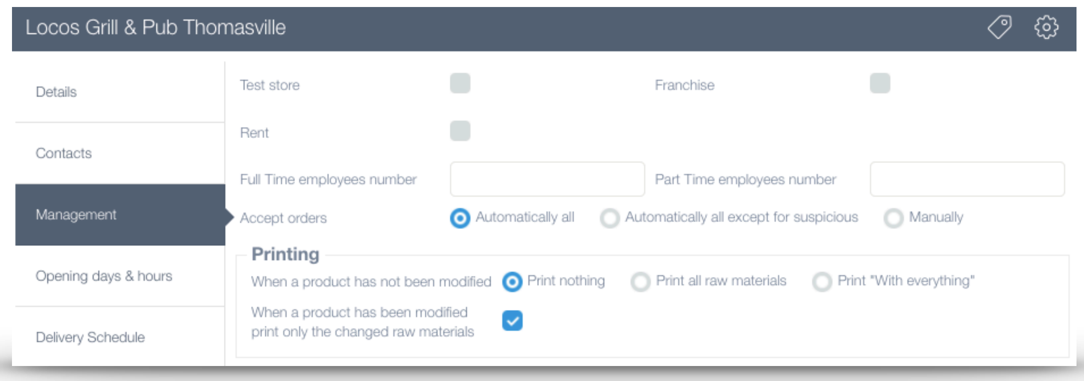
Sub Tab: Contacts

- **Users** – Select the users that can see this store's location. Matched users are used in order for them to be able to use this location in other Fimble applications, for example the Orders Monitor application.
  See how to manage users

- **Manager** – Select the store's manager in order for him to have exclusive access to some parts of the system that the rest of the users do not have.

- **Supervisor** – Select the store's supervisor in order for them to have exclusive access to some parts of the system that the rest of the users do not have.

Sub Tab: Management



- **Test Store** – This is used for testing purposes. If you mark a store as a test store it will only be used internally from the Fimble team, with no public view.
- **Franchise** (Optional) – Check this if this store location is a franchise. It is used for reporting.

- **Rent** (Optional) – Check if this store location is rented or owned. It is used for reporting.

- **Full time Employees Number** – enter the number of employees working on that location as full-time employees.

- **Part time Employees Number** – enter the number of employees working on that location as part-time employees.

- **Accept Orders** – You can select either to accept orders manually or automatically in the Orders Monitor application. If you select **automatically**, the order will be auto-printed and you can work by using only the papers printed from the printer if you wish. If you select **manual** acceptance you will have to monitor the Orders Monitor application in order to see what orders are coming and accept them manually from there.
  See how to accept orders

- **Printing** – Here you can set up how the printing takes place through our fimble Printerman application will appear when the paper is printed and if the product did not change at all. You can choose between the following options:
  - a) Print nothing: show only the product title.
  - b) Print all raw materials: show all materials under the product.
  - c) Print “with everything”: the paper will say the phrase with everything.
  - d) Print only the changed materials: You can also check this checkbox when a product has been modified in order to print only the changed materials of it.

Setting Working Hours (Locations app)

<u>Sub Tab: Opening Days & Hours</u>

Here you set your stores daily time schedule for customer to place take-away orders.

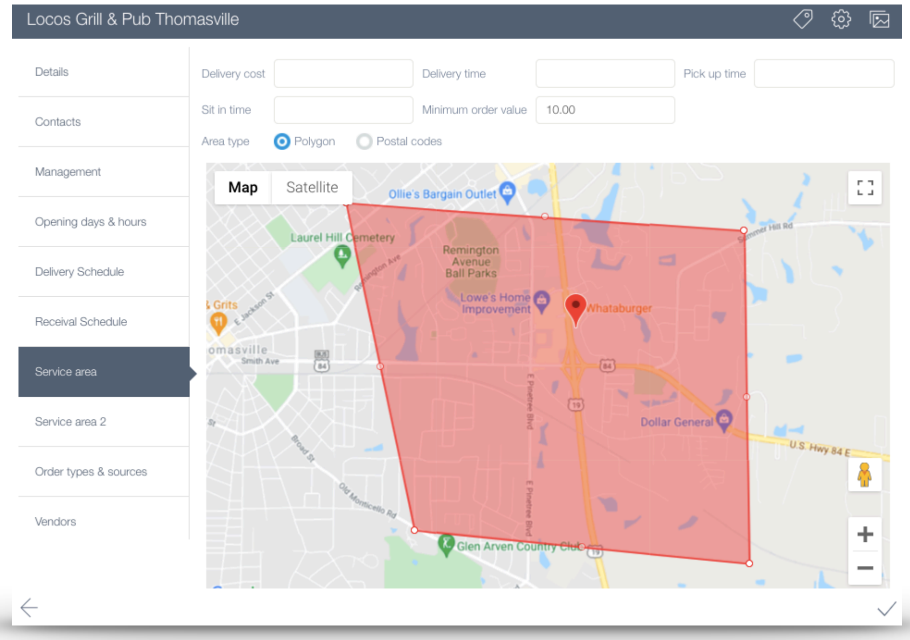
<u>Sub Tab: Delivery Schedule</u>

Works exactly like the opening days & hours. In this section you set the delivery schedule. The time schedule defines what hours the customers are able to place an order using the delivery option in the website or mobile application.

Adding Delivery Zones (Locations app)

<u>Sub Tab: Service Area</u>

Here you can add your store's delivery zone.



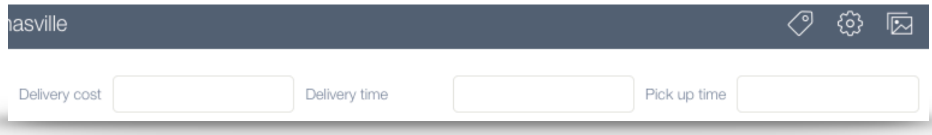
- **Service Method** – Select between the polygon and postal codes service method (if you have a KML file ready, we can investigate importing it).
  - a) Polygon: Draw a polygon on the map in order to specify the exact area that your restaurant provides the customer with a delivery option. You can mark the location by clicking in the areas you want and it will create a polygon for you. You can also make the map larger or smaller using the (+), (-) buttons on the bottom right corner of the map in order to identify better

what are the borders you wish the service area to have. Finally, you can choose between the map or satellite view.

- b) Postal Codes: Add the postal codes that you would like your restaurant to provide customers with delivery options.

- **Delivery Cost** – Set a delivery cost that is added on checkout for each delivery order your customer places.

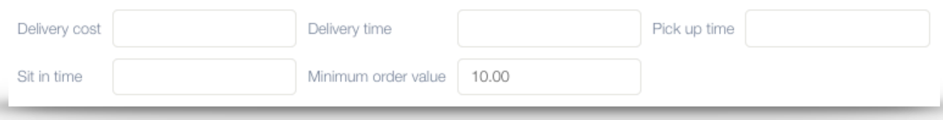
Setting Delivery Time (Locations app)



- **Delivery Time (estimate time)** – Set your restaurant's delivery time in order to provide your customers with a better ordering experience.

- **Pick-up Time (estimate time)** – Set your restaurant's take away time in order for the customer to know how much time before they need to come to your restaurant to pick-up their order and not waiting in front of the cashier.

- **Sit-in Time (estimate time)** – Set your sit-in time and what customers should expect from the time they ordered until they receive the order on their table.

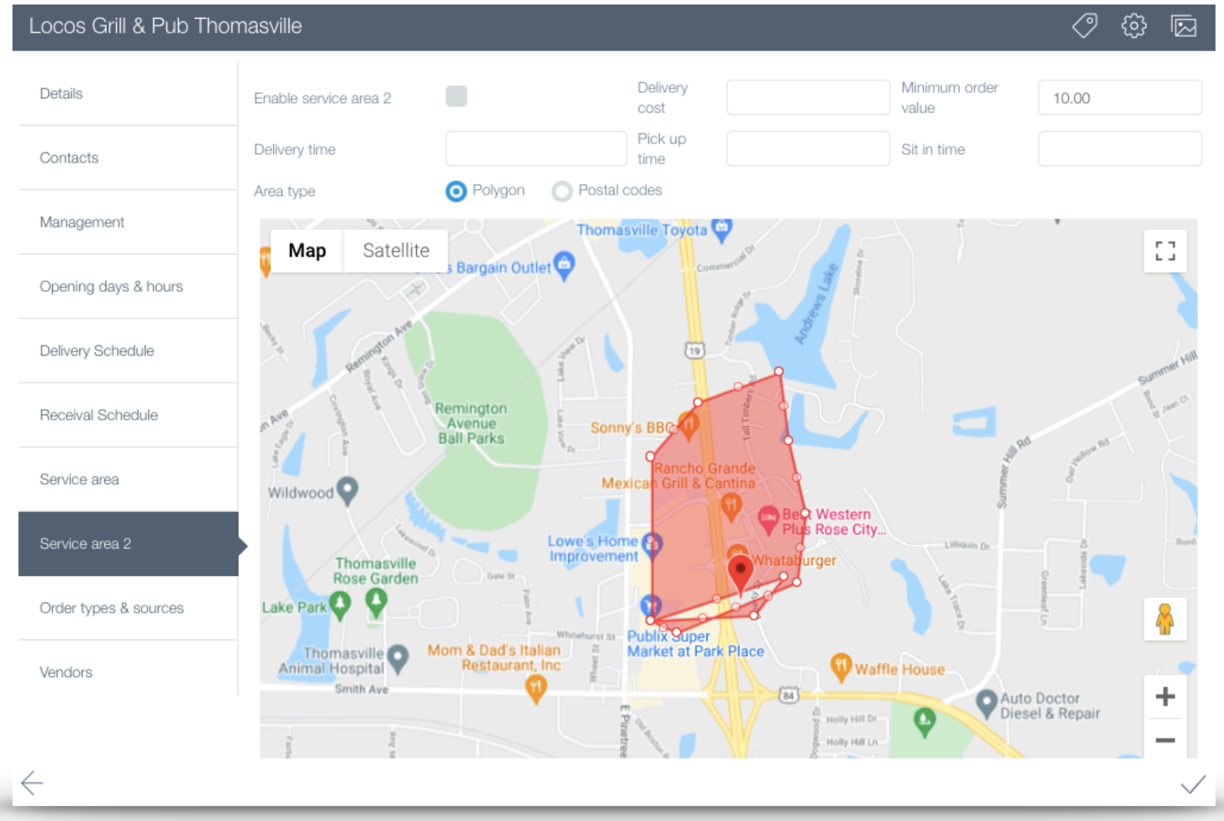


Setting Minimum Order Value (Locations app)

- **Minimum Order Value** – Set the minimum order value, anything less will not allow order to proceed to payment.

<u>Sub Tab: Service Area 2</u>

Service area 2 is used to set the secondary customer delivery usually with stipulations like larger minimum order or delivery cost or delivery time. Service area 2 uses exactly the same logic as service area 1.

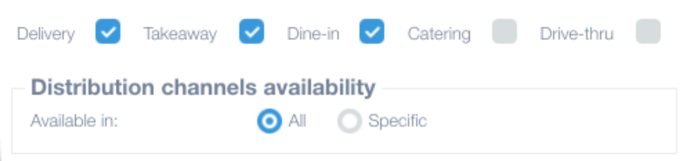


Managing Order Types (Locations app)

<u>Sub Tab: Order Types & Sources</u>

In this section you set the customer order type(s) the store can offer its customers. Below you will find the order types:

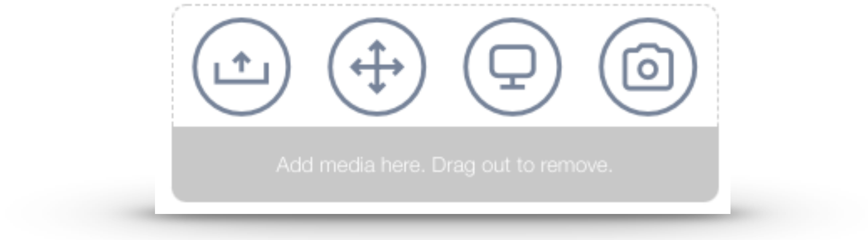
- a) Delivery
- b) Takeaway
- c) Dine-in



- d) Catering
- e) Drive-thru

- **Distribution Channels Availability** – Here you set the distribution channels where this store is available. You can choose between all or some of the predefined channels:
  - a) Web
  - b) Mobile
  - c) POS
  - d) etc.

<u>Sub Tab: Media</u>



- **Media** – Add a picture of your store by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photo you uploaded, will be displayed on the respective channels (eg. Website, mobile apps, etc.) in the stores section.

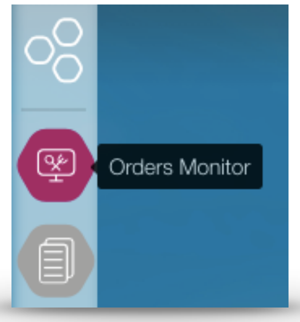
5. After adding / editing a new location, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Orders Management

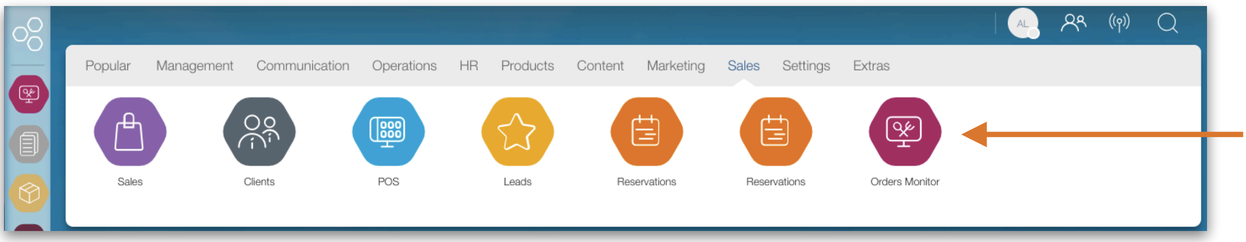
Orders Monitor Setup (Orders Monitor app)

Here you create the monitors that you want the orders to be displayed on. If, for example, the setup of the store defines that the orders related only to soft drinks should be displayed only on the cash register monitor, the products that need baking should be displayed only on the kitchen monitor and the salads should be displayed only on the bar monitor, then you set up 3 different monitors.

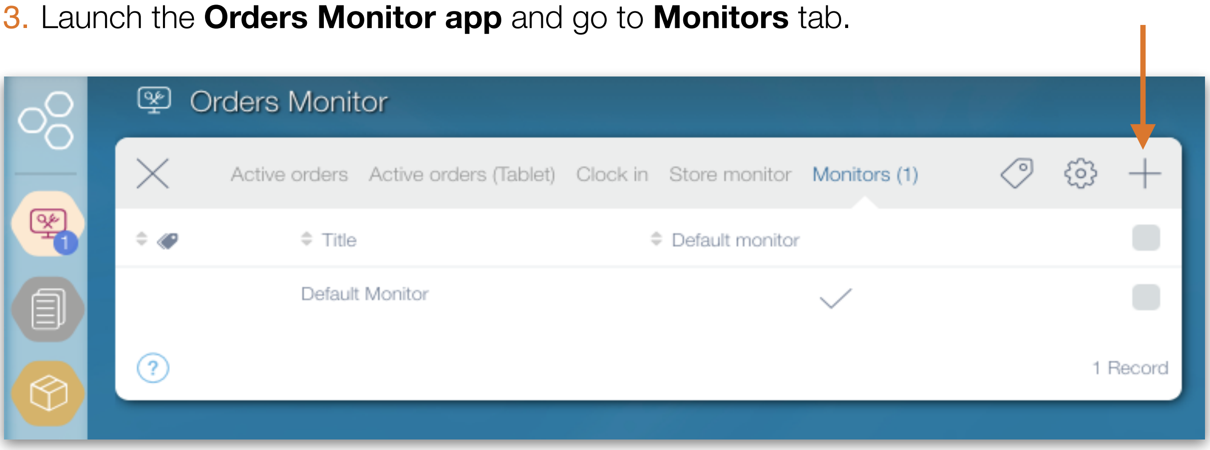
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Orders Monitor app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



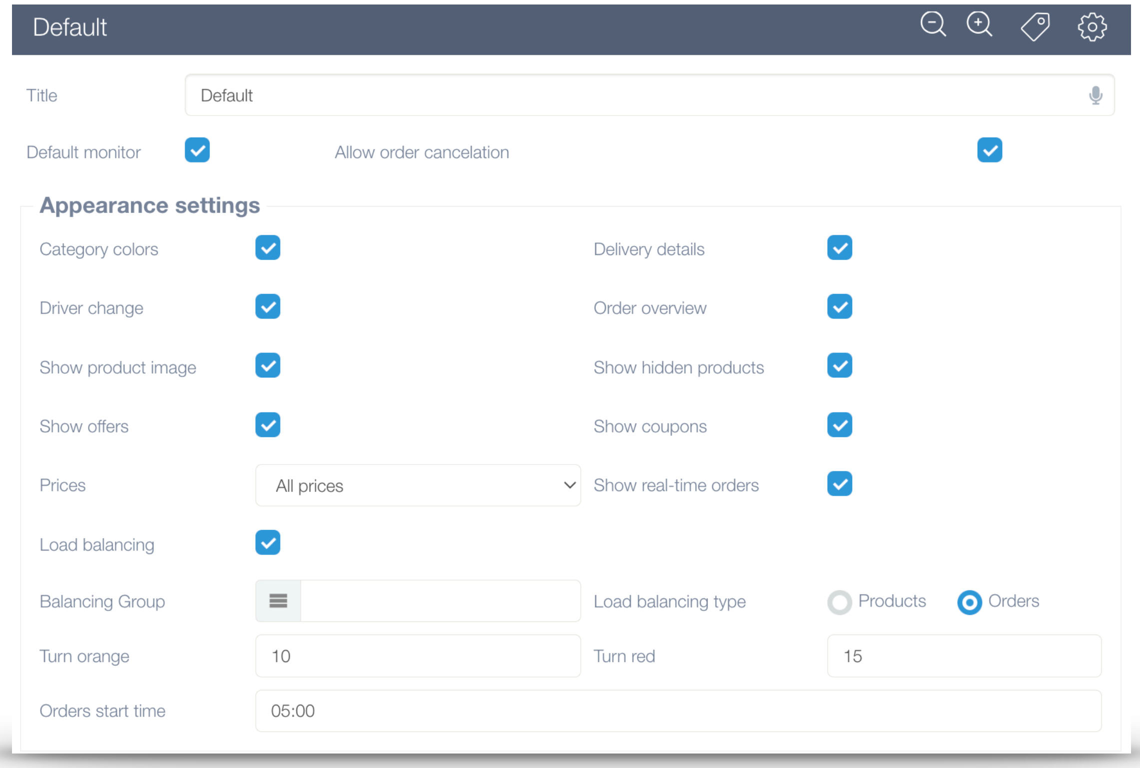
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Sales Category** where you will find the **Orders Monitor app** inside.



3. Launch the **Orders Monitor app** and go to **Monitors** tab.



4. You should fill in the following sections:



- **Title** – Define Monitor Title (eg. Cashier, Kitchen, Bar, etc.).

- **Default Monitor** – Select this option if you want it to be the default monitor every time you open the application.

- **Allow order cancellation —** Select this if you want the cancelation option to be applied in the specific monitor that you're creating.

Appearance Settings (section) – You should select you're preferred features here, in order to have more options displayed on your monitor when it's ready.

- **Category colors** — This option displays the category's color on each product that belongs in respective category. This color is displayed in POS as well.

- **Delivery details** — This option displays the customer's delivery information such as, the address, phone, doorbell and floor (applicable only in deliveries).

- **Driver change** — This option provides the ability to change the driver through the orders monitor (requires the Dispatch module).

- **Order overview** — This option provides the ability to see the overview of an ongoing order.

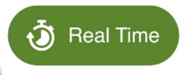
- **Show product image** — This option provides the ability to see the image of a product by clicking this icon (training mode must be enabled).

- **Show hidden products** — This option displays the products that you have choose to be hidden form menu (through Products app).

- **Show offers** — This option provides the ability to see if any offer is applied on an order.

- **Show coupons** — This option provides the ability to see if any coupons is applied on an order.

- **Show real-time orders** — When a user places an order at the POS, the items added to the basket are displayed in the order monitor (along with a green icon) before the entire order is completed. Once the order is complete, the green icon disappears.



- **Prices** –
    - a) All Prices: The prices of the products ordered, the total amount of the order, and the Tips are displayed separately (eg. Orders with a Burger - 5 €, a potato - 3 € and a soft drink - 2 €, total 10 €, Tips 1 €).
    - b) Totals and Tips: The total amount of the order and the value of the Tips are displayed and not the value of each product separately (eg. Orders with a Burger, a potato and a soft drink total 10 € & Tips 1 €).
    - c) Only Totals: Only the total amount of the order is displayed (without the value of the products separately and the tips).

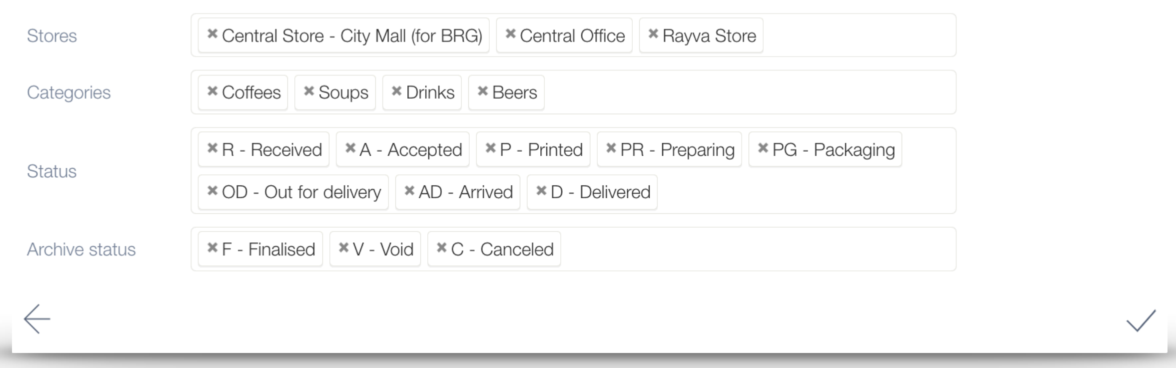
- d) Don't Show: No prices are displayed at all (eg. on the kitchen monitor where the price of the product, the total of the order or the tips do not concern the cook).

- **Load balancing** — Load balancing is used when there is more than one station in a kitchen and can be used in two different scenarios, per order or per product.
  - Per order: Orders are split between different stations depending on the volume of orders at each station. For example, if Station1 has three orders and Station2 has two, then the next order will be allocated to Station2.
  - Per product: Products are split between different stations depending on the volume of products at each station. For example, if Station1 has five burgers and Station2 has three, then the next burgers that come in will be allocated to Station2 until they are balanced in product preparation.
- If Load balancing is disabled and there is more than one station then each order will be displayed in both stations.

- **Turn Orange** – (in minutes): You set how many minutes from the moment the order is passed to the system, it will turn orange to show the respective staff that they must proceed with the status **relatively immediately**.

- **Turn Red** – (in minutes): You set how many minutes from the moment the order is passed to the system, it will turn red to show the respective staff that they must proceed with the status **immediately**.

- **Orders start time** — Here you select the time that orders monitor will automatically clear the archived orders and refresh with no orders to be displayed (this does not applied in Active & Timed orders tab).



- **Stores** – Select the store / stores in which you want this monitor setup to be applied for this specific screen.
  See how to manage locations

- **Categories** – Select the products categories that you want them to be displayed on this specific monitor (eg. on the kitchen monitor only the products that require baking, in the bar only the salads, and in the cash register only the soft drinks and so on). If you do not select any product category, then it displays them all by default.
  See how to manage product categories

- **Statuses** – Select the statuses that will appear in the Active Orders tab only (eg. Received, Accepted, Printed, Out for delivery, Payment Processing).
- **Archive Statuses** – Select the statuses that will appear in the Archive tab (eg .Finalized, Rejected, Void, Void Printed, Canceled).

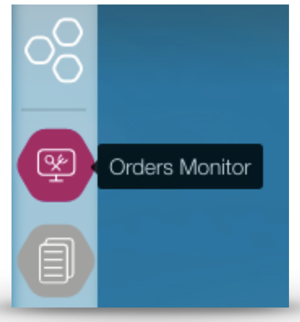
5. After adding a new monitor, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Receiving Orders (Orders Monitor app)

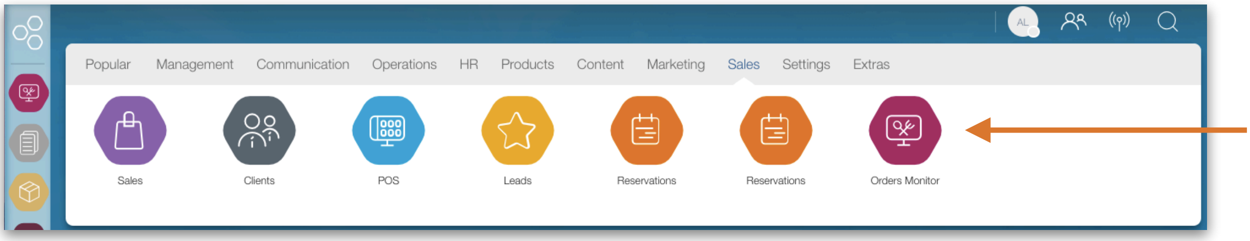
The Fimble system allows you to handle orders placed online on any device. The placed orders will wait for acceptance or rejection until the end of the day. However, staff responsiveness is crucial for achieving customer satisfaction and we encourage you to handle incoming orders as quickly as possible.

Accepting orders

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Orders Monitor app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu. You can also search it by clicking the magnify glass and typing its name.



2. Launch the **Orders Monitor app**.

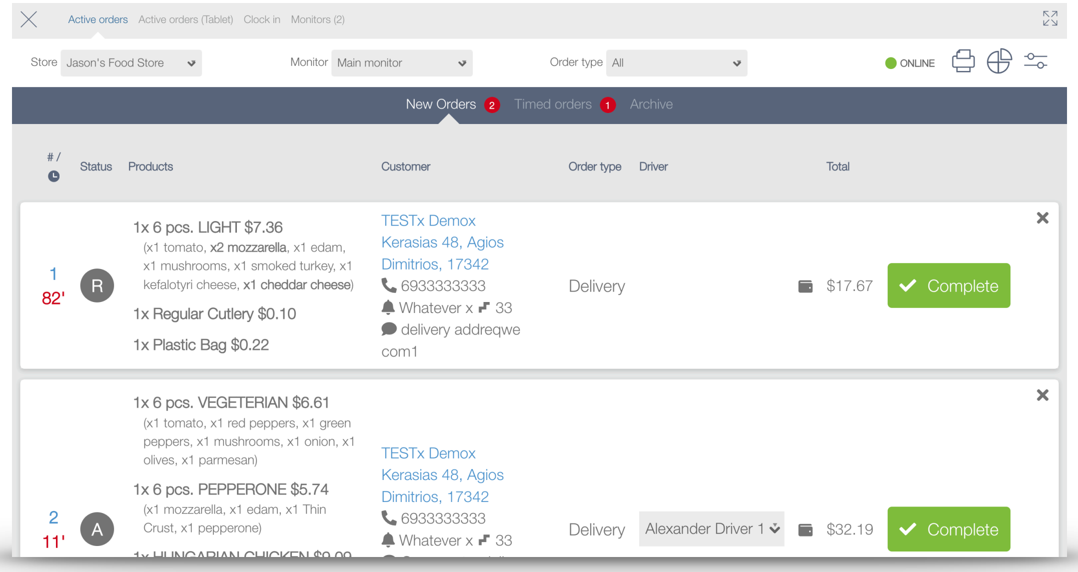


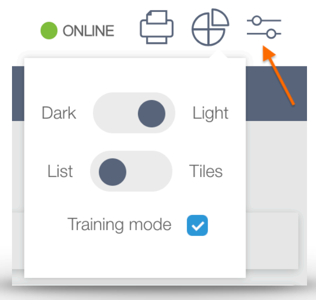
3. You should monitor the following sections:

First: make sure the system is online (top right, Green Status). In case the system is not Online or loses the connection then a continuous "beep" sound begins.

For convenience and use of more screen space, you can click the Full Screen icon on the top right.

<u>Sub Tab: Active Orders</u>

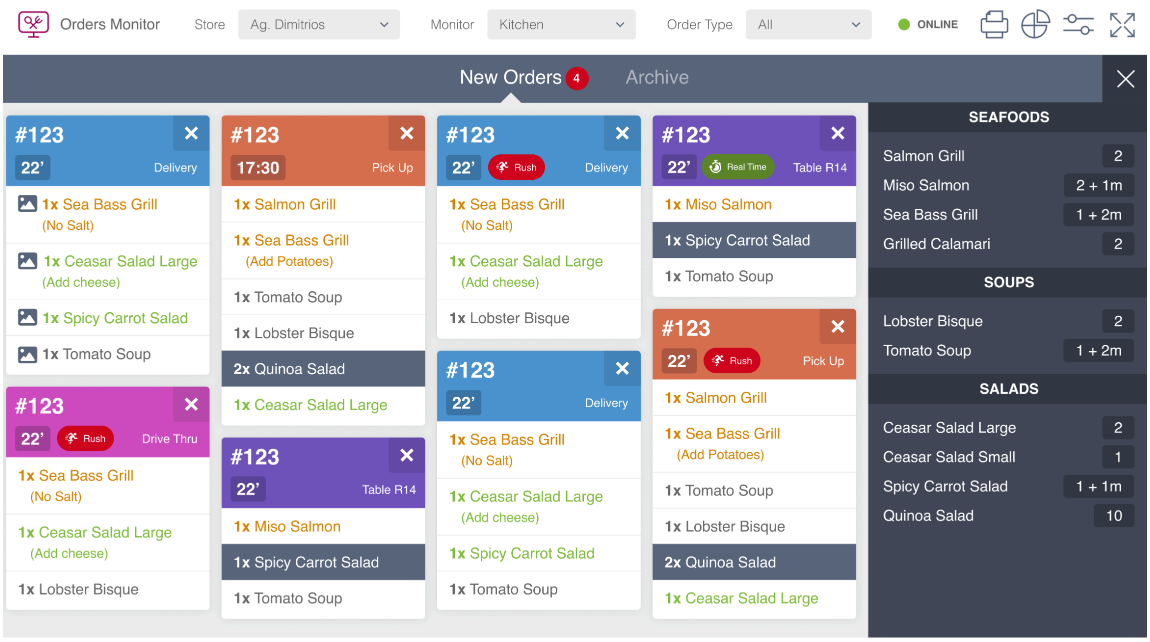




- **Dark / Light theme** — This option changes the theme of Orders monitor to Dark or Light (you can enable it through the configuration settings on top right).
- **Training mode** —
  - On: When this option is enabled the products on the order are displayed with their full title, recipe & extra materials (if any) and with their image (if <u>show product image</u> option is enabled as well).
  - Off: When this option is not enabled the products on the order are displayed only with their codes and the extra materials (if any).

- **List / Tiles view** — Orders monitor provides you with two different views which can be used for a more convenient administration in different cases.
  - List view: The List view option provides you all the necessary information for an order, all in one place (list), such as products, customer details, order types, driver, prices, complete/cancel order, etc (see the image above).
  - Tiles view: This is a different view of the Order Monitor that can be much more convenient for the back of house and for large volumes of orders. The tile view has all the same features as the list view plus a few more, such as the ability to delete products from orders (when they are finished) and to categorise products by quantity and product category. For example, if you have three cheeseburgers from three different orders, the right sidebar will

show the product name, the total quantity of that product and the category it belongs to.



- **Performance** — This option provides you with a variety of metrics (for each current day) including the number of orders per order type (delivery, take-away, etc), the percentage of orders per source (web, mobile, etc) as well as preparation times for each of the available order types.

- **Store** – Filter the displayed orders according to the store you are interested in.
  See how to manage locations

- **Order Type** – Filter the displayed orders according to the type of order you are interested in (Delivery, Takeaway, Dine-in).
  See how to manage order types

- **New Orders** – The orders that have been passed to the system (from WEB, Mobile, POS) are displayed here and reflect the current date and time.

For any New Order you will hear a short "beep" sound and it immediately appears on your screen. There you see various details of the order such as the time has been passed from the moment you have received it and how long it is on hold (you have not passed it to the cash register) as well as Payment Method, Status, Total. The Order Number in the first column is also a link by which you can see the complete order's details.

Once you see the order in New Orders tab, you press the accept button and the order goes to the next available status (eg. Printed, Preparing, Packaging, Out for Delivery, Oven, etc.). What kind of status the order will take depends on the available statuses you have set in the Fimble system.

- **Timed Orders** – The timed orders that have passed to the system (from WEB, Mobile, POS) are displayed here and relate to a future date and time.

- **Archive** – The orders that have been passed to the system (from WEB, Mobile, POS) that have been either Void or Finalized are displayed here (as are any other status we have dynamically defined will lead them to the archive) - eg. Our customers are able to see, in the archived orders section, the orders with the following statuses: Rejected, Void, Finalized, Canceled, Void Printed.

Sub Tab: Active Orders (Tablet)

For tablets, a second tab "Active Orders (Tablet)" has been added which is tablet optimized so it is recommended to use it instead of the Active Orders tab. What it does is it just opens the Active Orders in a new web or mobile browser tab & in full screen for enhanced Tablet experience.

Rejecting an Order (Orders Monitor & Workflow app)

The Fimble system allows you to reject an order if it can not be full-filled. This is done through the Orders Monitor application as well upon receiving the order. The store can reject the order and, if configured, select the rejection reason and then the order arrives in the Workflow application for further handling if needed (eg sent to a different store). The customer upon rejection gets notified via email about this action.

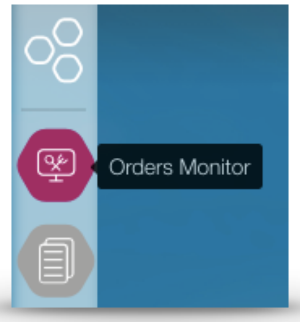
Cancelling an Order (Orders Monitor & Workflow app)

The Fimble system allows you to cancel an order if it can not be full-filled for any reason or cancelled by the client. This is done through the Orders Monitor application upon the acceptance of the order or Workflow if the order is delayed or stuck. The user can cancel the order and, if configured, select the cancellation reason. The customer upon cancellation gets notified via email about this action.

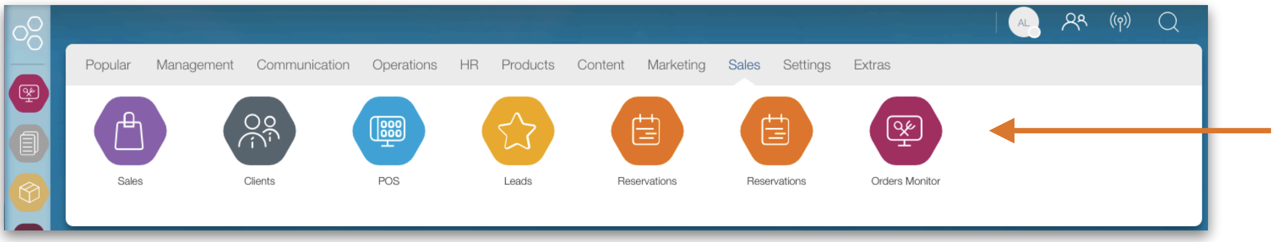
Changing Product Status & Managing Order Preparation Time (Orders Monitor app)

The Fimble system allows you to handle the product's status that may be in short supply. Also it lets you manage the order preparation time. This process can be done by the store manager from the store overview tab.

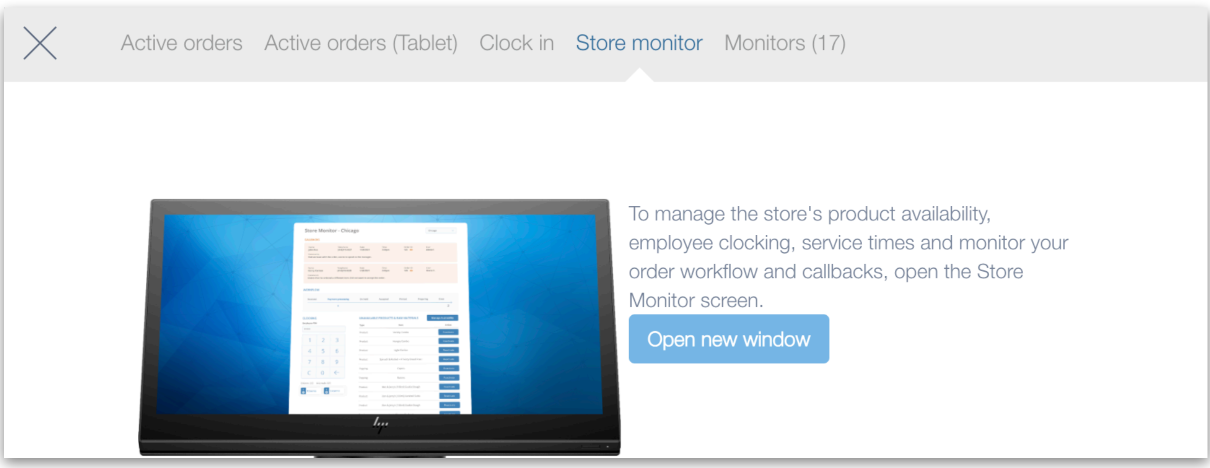
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Orders Monitor app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Sales Category** where you will find the **Orders Monitor app** inside.



3. Launch the **Orders Monitor app** and go to **Store monitor** tab.



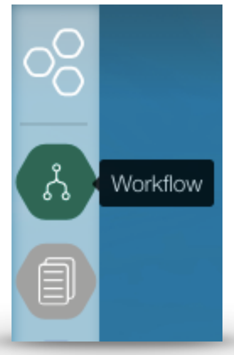
4. You should press the **Open new window** button which leads you to the management of the store.

- **Unavailable Products** – Filter the displayed orders according to the store you are interested in.
  - **Manage Availability:** With the manage availability button we can add products that are not available.
  - **Reactivate:** With the reactivate button we make the product available again.
- **Service Times** – In service times you can change the order preparation time.

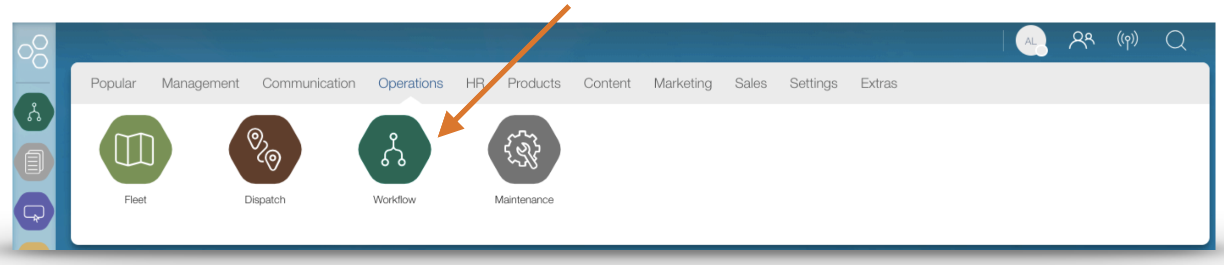
Managing Delayed & Problematic Orders (Workflow app)

The Fimble system allows you to manage stuck & delayed orders. This is done through the Workflow application on the tab Pending Orders.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Workflow app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Operations Category** where you will find the **Workflow app** inside.



3. Launch the **Workflow app** and go to the **Pending Orders** tab.

4. You should monitor the following sections:

Each order's status has an average waiting time, after this time has passed and the status is not updated, the order becomes delayed and it is displayed on Workflow. Then, after you communicate with the responsible team all the details needed for this order (why it is delayed etc), you can either update the order to the next available status or cancel the order.

Also, on the **Pending Orders** tab the following orders' statuses are displayed as well:

On Hold: This is a conditional status, used based on the company's needs. For example, you might want to put an order On Hold after the successful payment of an order above 500$ because it might seem suspicious and warrant further investigation / communication with the client / store and different handling.

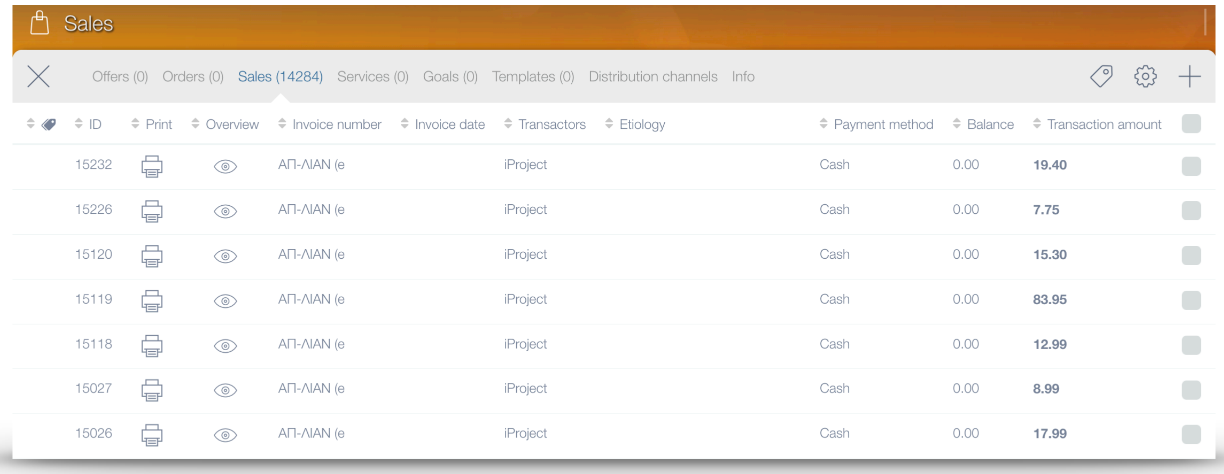
Payment Processing: If an order is paid online, the first order status is “Payment Processing”. This remains while the system is waiting for the payment gateway to reply that the payment was successful.

Rejected: If an order is rejected by the store for any reason, you can re-route the order to a different store.

Managing Orders through Sales app

Another way to manage but also get all the necessary information of your orders is through Sales app.

Open the **Sales app** and go to the **Sales tab**. There you can see at first glance a variety of information for each order as well as do a few actions to manage them.



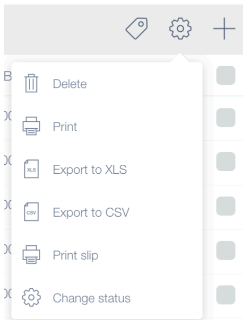
- **ID** — The id of the order

- **Overview** — The order’s overview with a variety of information such as client’s details, delivery details, order status, etc.

- **Invoice number** — The invoice number (such as Retail Invoice, Retail Credit Invoice).

- **Invoice date** — The date of issue.
- **Transactors** — The client's name.
- **Etiology** — The comments of the order (e.g. Don't ring the bell, etc).
- **Payment method** — The payment method such as cash, card, payPal, etc.
- **Transaction amount** — The final amount of the order.

Sales actions



Sales app provides another one channel by which you can manage your orders. By clicking the gear icon you can see a variety of actions such as Delete, Export to XLS or CSV, Print slip (this in not applied for receipts, only for order slips) and Change status of an order.

Sales overview

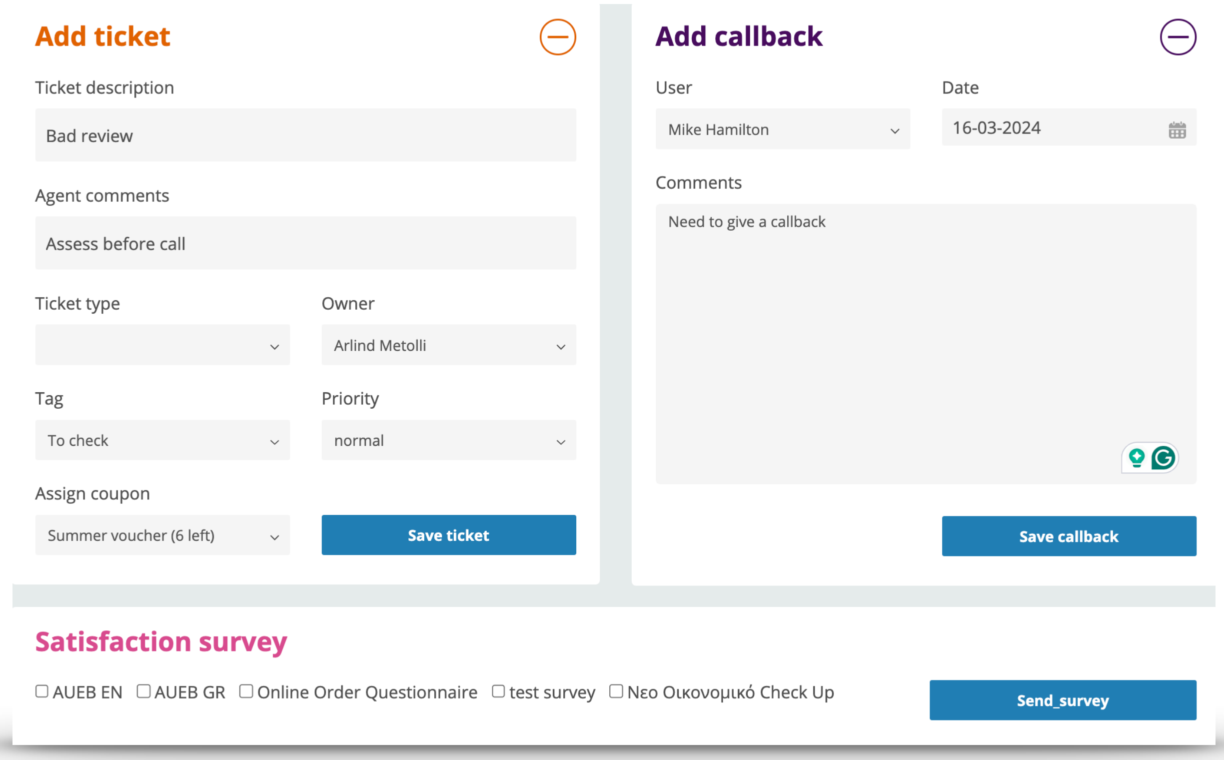
- You can see a sale overview by clicking the **eye** icon and get a variety of information for each of your orders such as, Sale details, Customer details, Delivery details, Order status and more.

- Furthermore you can proceed to three more actions:

    1. **Add Ticket** — You can add a ticket in case of a complaint for an internal investigation or even compensate the customer with a "sorry" coupon. You can add a Ticket description, Agent's comments, a Ticket type (e.g. Bad review), the Owner (the person who is responsible for that ticket), a Tag, a Priority and Assign a coupon. If you assign a coupon, an automated email will be sent to the customer's email address with the respective information.

2. **Add Callback** — You can add a callback by assigning a User (the person who has to contact the customer), a date (the date that the callback should be done), Comments and Save. Finally the system assigns automatically the person to whom the callback must be done. See how to manage a callback

3. **Send surveys** — You can also send multiple surveys to a customer by selecting the respective checkboxes and hitting the Send survey button.



Printing

Print Orders via Printerman

Fimble helps you print the orders via the Printerman application. First set up the Printerman software in order to be able to print your orders on some of the most popular / tested printers on the market. Thanks to this integration, orders will be printed automatically after their acceptance.

Materials you will need

- 1 x PC / Laptop
- 1 x Printer

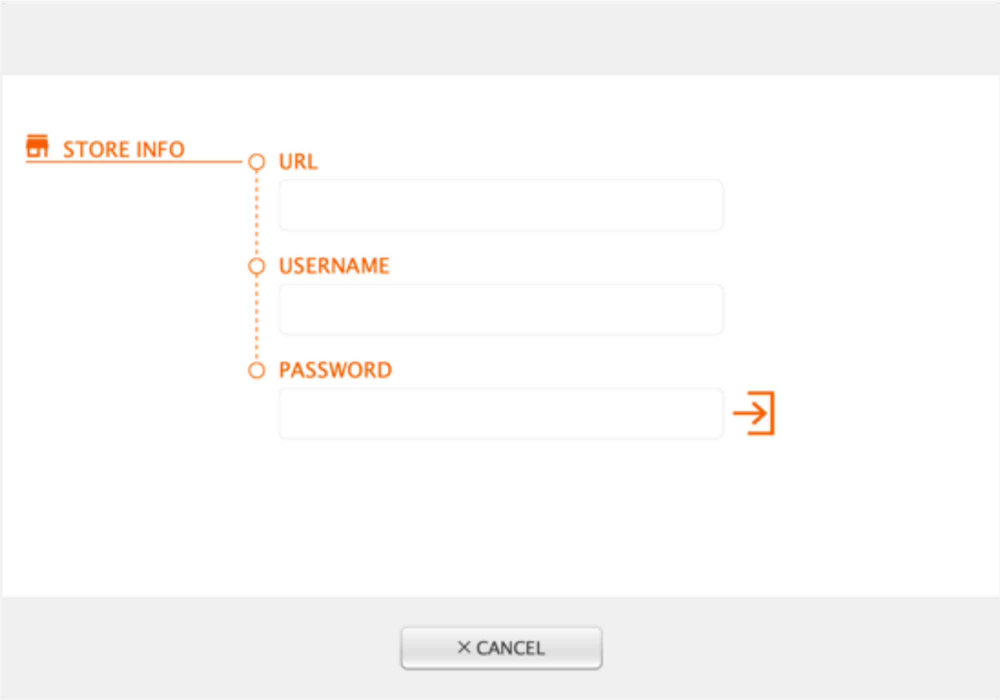
Guide

- Firstly, you will need to install printer's drivers on your machine. When this process is done, make sure you have connected the printer to the PC / Laptop. Execute a test print through your printing system in order to make sure that it is set up properly.

- Next step, you need to download our Printerman app by clicking on this link: Download Printerman app (In-store Applications -> Printerman). If you have an Apple device, after downloading the file you should change the type of the file from .exe to .jar.

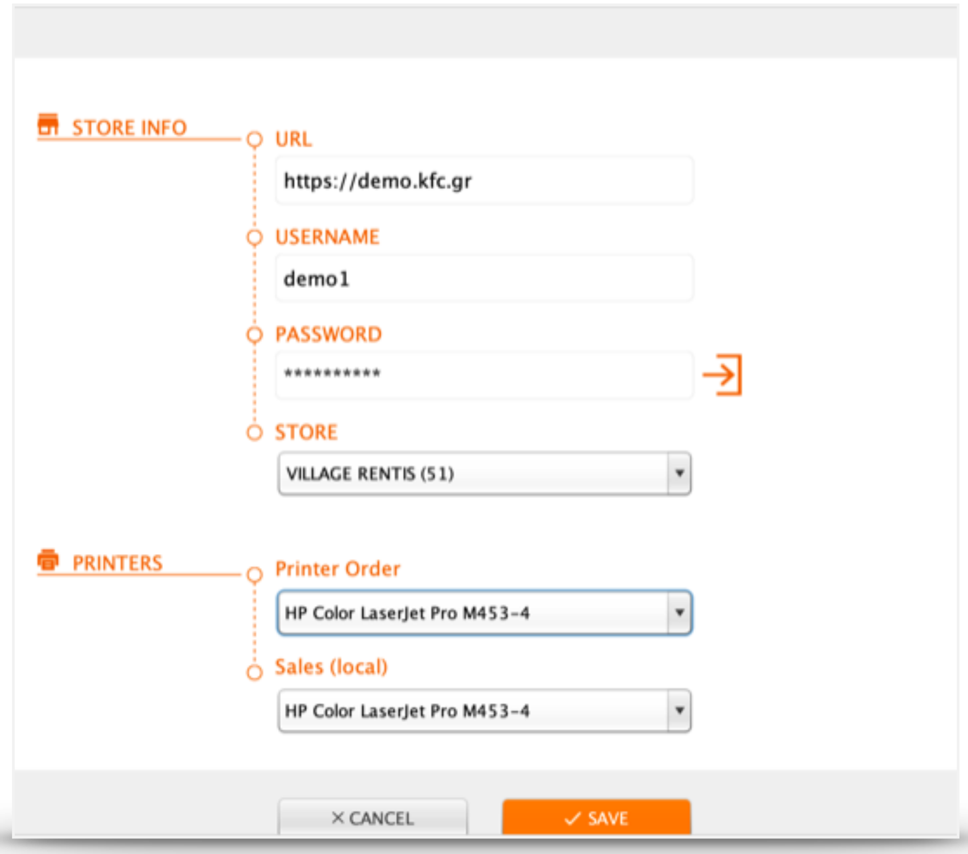
- You are now ready to open the app. The first thing you should do is to find this Gear icon in the app. By pressing it, it will take you to the following page:

- Fill in the credentials that will log you into your account:
  - URL: Your Fimble URL
  - Username: Provided by Fimble team



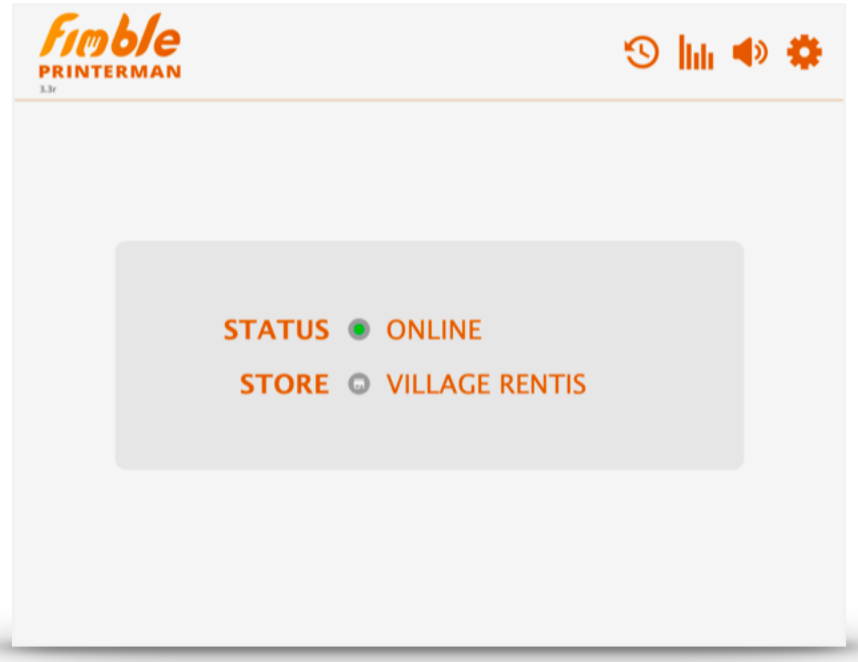
- Password: Provided by Fimble team

• After you enter the credentials, press the login button and it will redirect you to this page:



- Here, you select the store that you wish to see your orders. You also need to make sure that you select the correct printers on this step. By opening the dropdown “Printer order” and "Sales (local)” it will show a list of printers that are nearby. You should select the printer that you installed the drivers in the previous steps. When you enter those details, you are ready to save them by pressing the “Save” button.

- By clicking the Save button, you will get redirected to the Printerman homepage, where you can see the status and the store you have selected. Status = online means that everything is working properly. If this status changes to “offline”, just restart the Printerman app.



- If you would like to cross check that your Printerman app is connected to your printer, you can make a print report. To create a print report, you should press this icon  from the homepage, and then the PRINT REPORT button found at the bottom of the page. If your printer prints a paper, it means that it is working properly.

- You have now completed the process of setting up the Printerman. Let's move to connecting it to Fimble. Follow this link and use the credentials (the same with those you entered in Printerman app) to login to our platform:
  - URL: Your Fimble URL
  - Username: Provided by Fimble team
  - Password: Provided by Fimble team

- You can now make new orders through our POS application or receive orders through your restaurant's online ordering system. The orders will appear in the Fimble Orders Monitor app and should have status "P" printed in order to be printed to Printerman.

Customers & Reviews

Customer Data Management (Clients app)

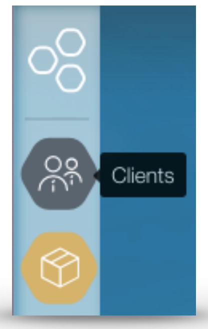
Customer data management is the collection, storage and use of data in a secure, and efficient manner. With a restaurant's customer database, you are able to tailor marketing campaigns and promotions to your customers. Data management helps a business achieve maximum benefits. In Fimble, you can easily manage the database of all your restaurant customers.

Customer Database

In Fimble you have access to your customer database. There are two types of customers:

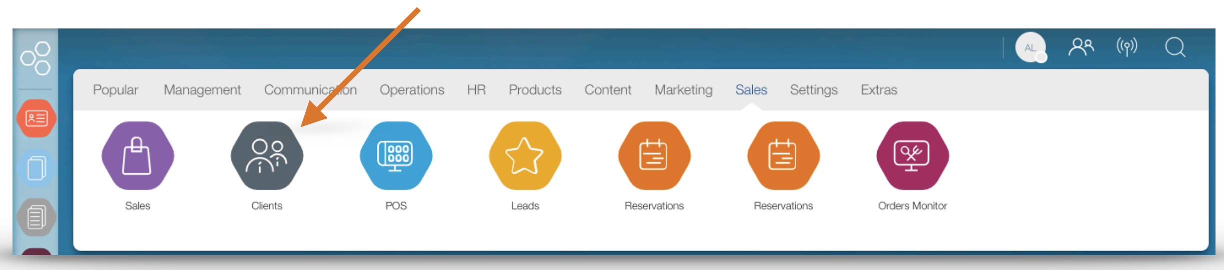
- registered customers who set up an account;
- guest customers, i.e. those who placed orders without creating an account.

See how to check your restaurant's customer database in the Fimble system.

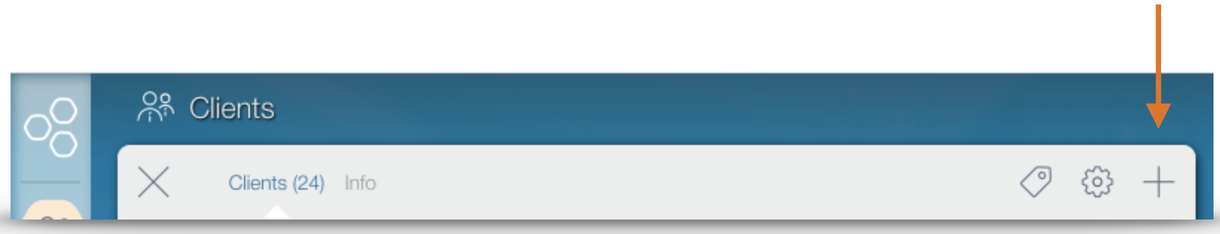


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Clients app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Sales Category** where you will find the **Clients app** inside.



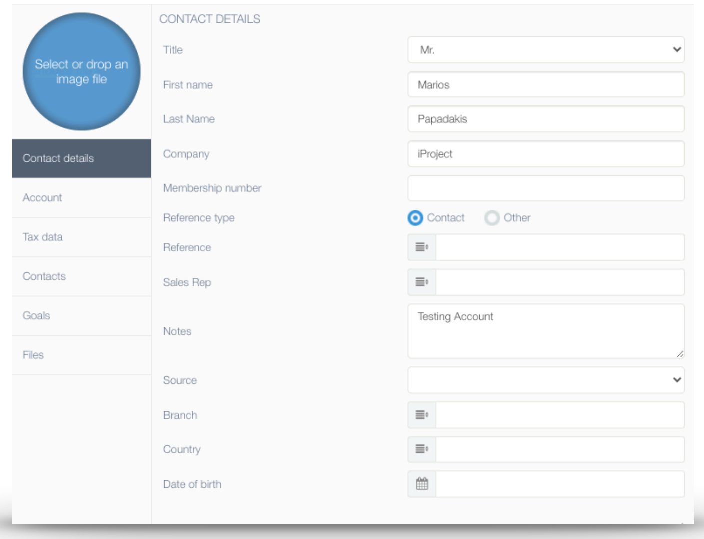
3. Launch the **Clients app,** select the **Clients tab** and press the "+" icon to add a new customer or just press a customer's name to see their details. You can even search from the top right search icon the name of the customer or with other details of them. In case you create a new customer, it will open a new form where you are able to add the required fields for the new customer.



4. You can see, add or change, among others the following sections:

Select or drag an image file: Here you can set an image for the client if you wish, either by selecting from a File Manager or by dragging & dropping from a folder in the File Manager.

Sub Tab: Contact Details



- **Title** – The client's title if desired, from the options Mr, Mrs, Ms, Dr, Prof.

- **First Name & Last Name** – First & Last name of the client.

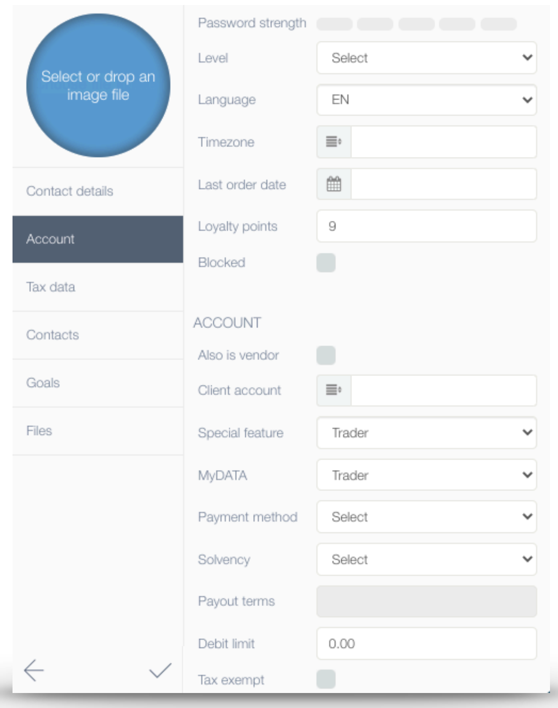
- **Membership Number** – If you run a loyalty program through fimble, each of your customers has a unique number in this field which is essentially their membership card number which appears in their mobile application.

- **Notes** – Add notes concerning the customer that they cannot see them when logged in by their own user account in the system.

In the communication details you can add a wealth of information regarding the client such as personal and corporate email, home or work address, landline or mobile phone, social media links and more.

- **Communication Details - Auto Inform** – Here all the required customer's contact details are saved when they registered on your restaurant's website and they are prerequisite in order for their orders to be added to the system. You can add, edit or delete these contact details if needed.

<u>Sub Tab: Account</u>



- **Username & Password** – Username and password with which the customer will be able to log in to your restaurant's website or mobile application. Note, after the customers create their account on your restaurant's website or mobile application the password cannot be seen for reasons of encryption and security of the system, so you can only change it on behalf of the customers if needed.

- **Confirm Password** – If you change a customer's password, type again the password for match confirmation.

- **Loyalty Points** – If your fimble restaurant runs a loyalty program, here is where the loyalty points are automatically registered that each customer collects and / or burns (value decreases when used).

<u>Sub Tab: Tax Data</u>

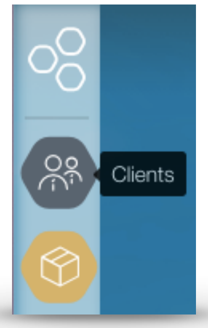
Here you can fill in the customer's tax information if they ask for invoice on behalf of a business. In case you add a corporate VAT number in the corresponding field, then the rest of the form is filled in automatically by the system in countries that support this online.

5. After creating / editing a customer, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

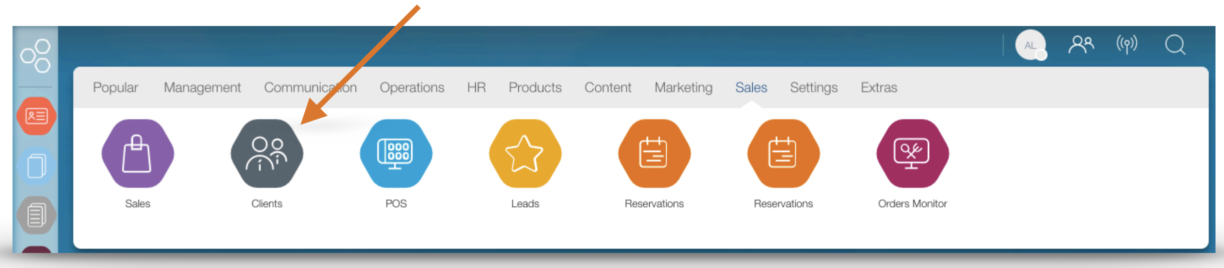
Customer Information (Clients app)

Detailed information about the selected customer.

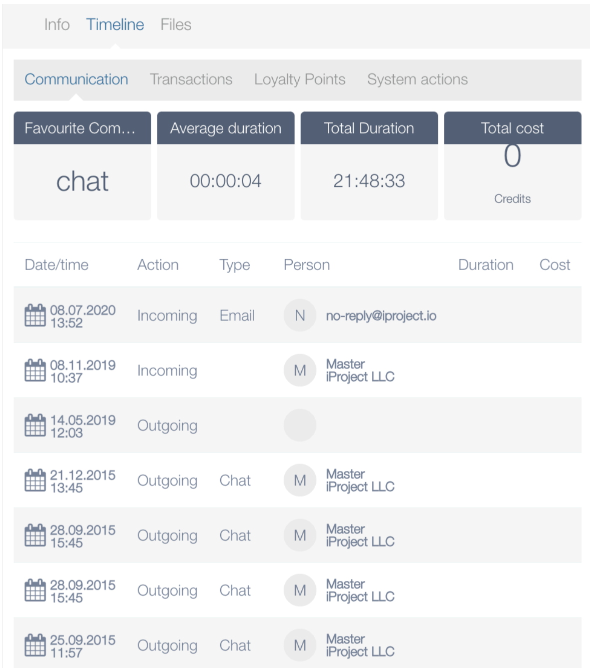
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Clients app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Sales Category** where you will find the **Clients app** inside.



3. Launch the **Clients app,** select the **Clients tab** and go to the timeline sub tab. It will show you a list of all the communication history of the customer along with other details like their orders history, loyalty points and system actions, etc.



Sub Tab: Loyalty Points

- In Loyalty points tab you can see four widgets with a variety of information regarding the history of points of each of your customers such as, the available points, redeemed points, total points and the total amount spent (in €, $, etc.) including only the orders in which the customer redeemed or accumulated or both points.
- Respectively, in the list below, you can get extra information regarding the loyalty points of each customer per order.

Add image

The same goes for the rest of the tabs such as the Transactions, System actions and the Subscription and Files tabs.

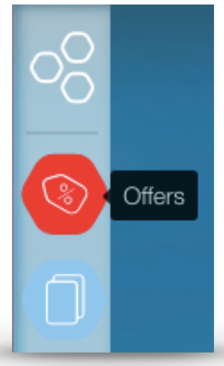
Offers & Coupons

Offers Management (Offers app)

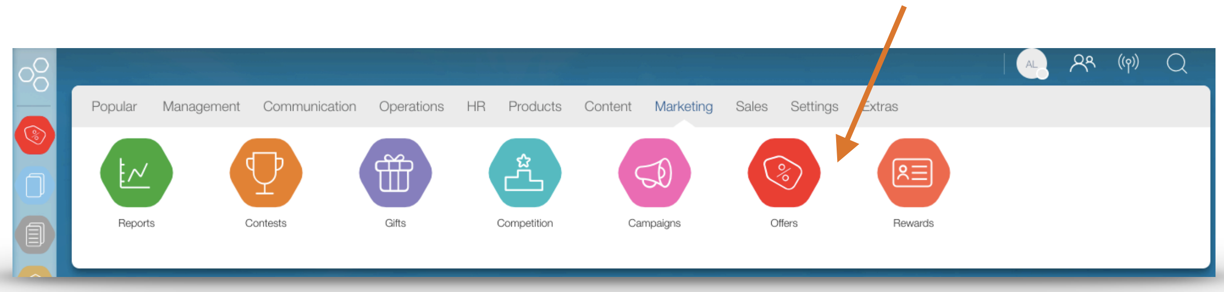
Offers help create an effective marketing strategy and increase sales. You can create any offers for your customers, but before you do it, identify the goal(s) you want to achieve with them.

Adding Offer

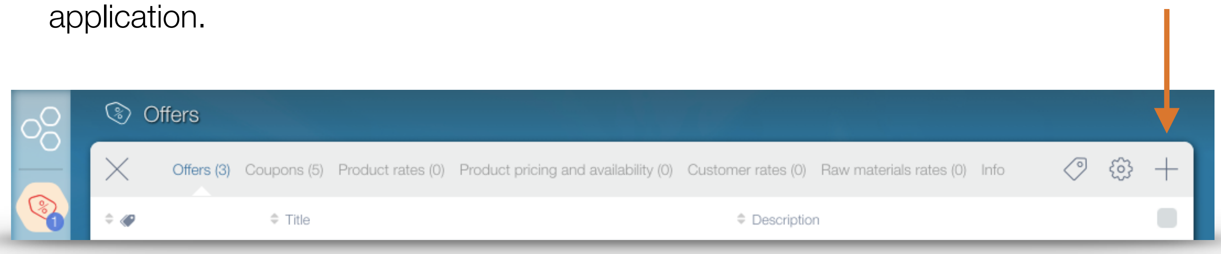
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Offers app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Offers app** inside.

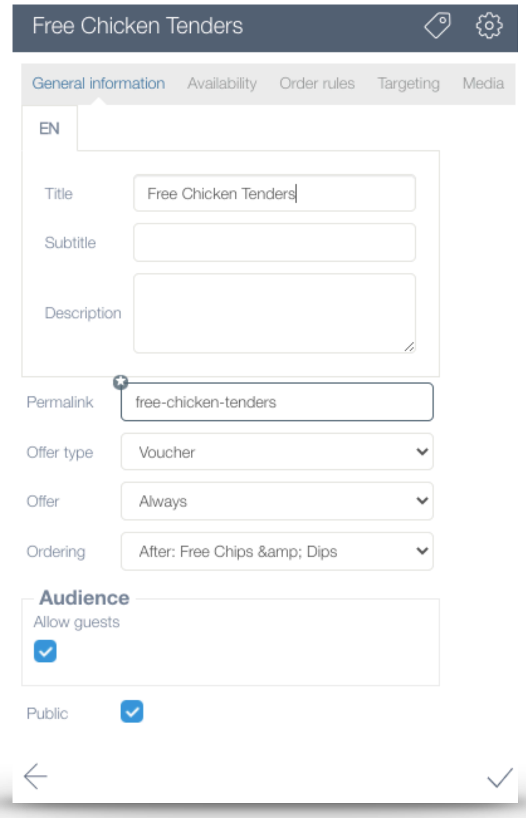


3. Launch the **Offers app,** select the **Offers tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the offer, otherwise it cannot be used in the menu and the homepage in the restaurant's website or mobile application.



4. You should fill in, among others the following sections:

<u>Sub Tab: General Information</u>



- **Title** – Add the offer title.

- **Subtitle** – Add a mini description.

- **Description (Optional)** – Add a full description.

- **Permalink** – Add a permalink that will show in the url. Always write the name of the offer in small English letters (eg. extra10off). In case you want to put 2 words or more, you should separate the words with a hyphen without spaces (eg. 2nd-classicburgers-half). You should never use capital letters and a space between words.

- **Offer Type** – You can choose between the Offer Types:

- a) Automatic: the customer will be able to get the offer only by adding to the cart the products included in it and it will be activated automatically. They will not be able to see the specific offer in the menu and select it from there.
- b) Guided: the customer will be able to see the offer in the menu and select it only from there.
- c) Automatic & Guided: Combination of the above two functions.
- d) Coupon: offer that is activated only through a coupon.
- e) Automatic, guided & targeted: Combination of a & b enabling the specific offer to be assigned to a specific customer, or to many.
- f) Merged: This offer can be activated in addition to another. If, for example, a product falls into an offer with a 15% discount and you make another offer that corresponds to the specific product, defining it as Complementary, in the specific product both offers can be applied at the same time in the cart.

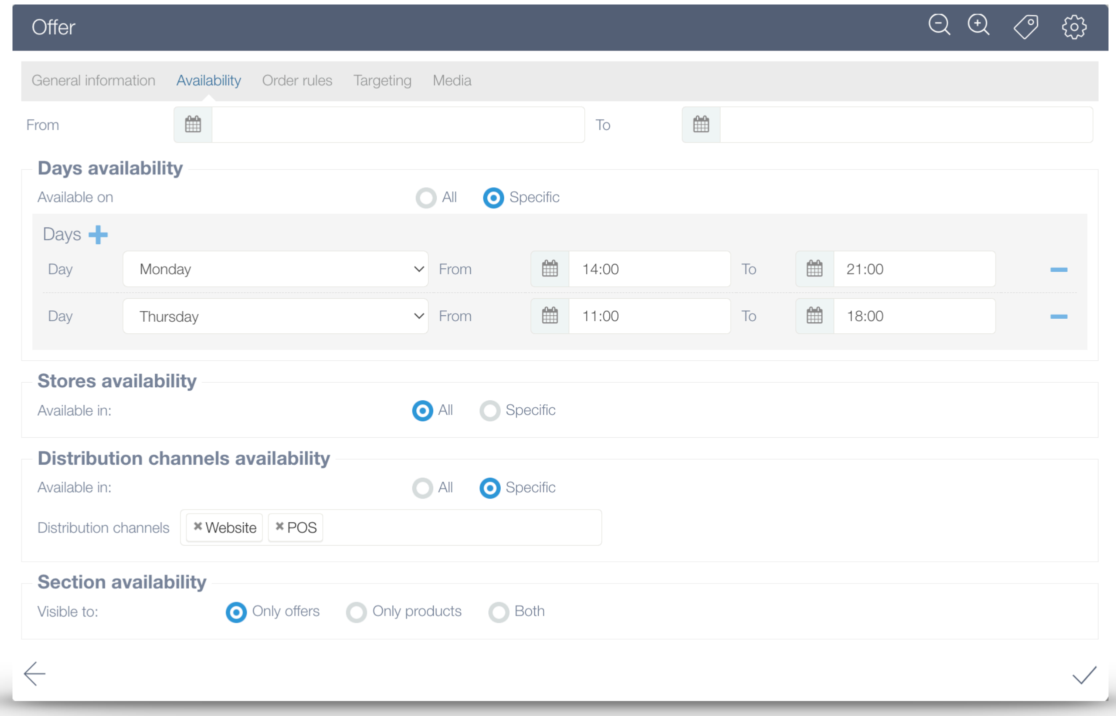
- **Offer** –
  - a) Now: the offer is valid only for NOW orders (i.e. does not apply to post date or timed orders)
  - b) Post date order: the offer is valid only for post dated orders
  - c) Timed-order: Valid only for pre-orders
  - d) Always: Valid in all the above cases

- **Ordering** – Choose after which offer the specific one will appear in the menu (applies only to Guided offers).

- **Allow Guests** – By selecting the checkbox, this offer becomes available to those who will come to order as guests, without logging in to an account on the website.

- **Public** – Choose if the offer you are creating will be displayed in the predefined channels.

Sub Tab: Availability



- **From - To** – Select a specific date-range from the date picker that the offer will be available.

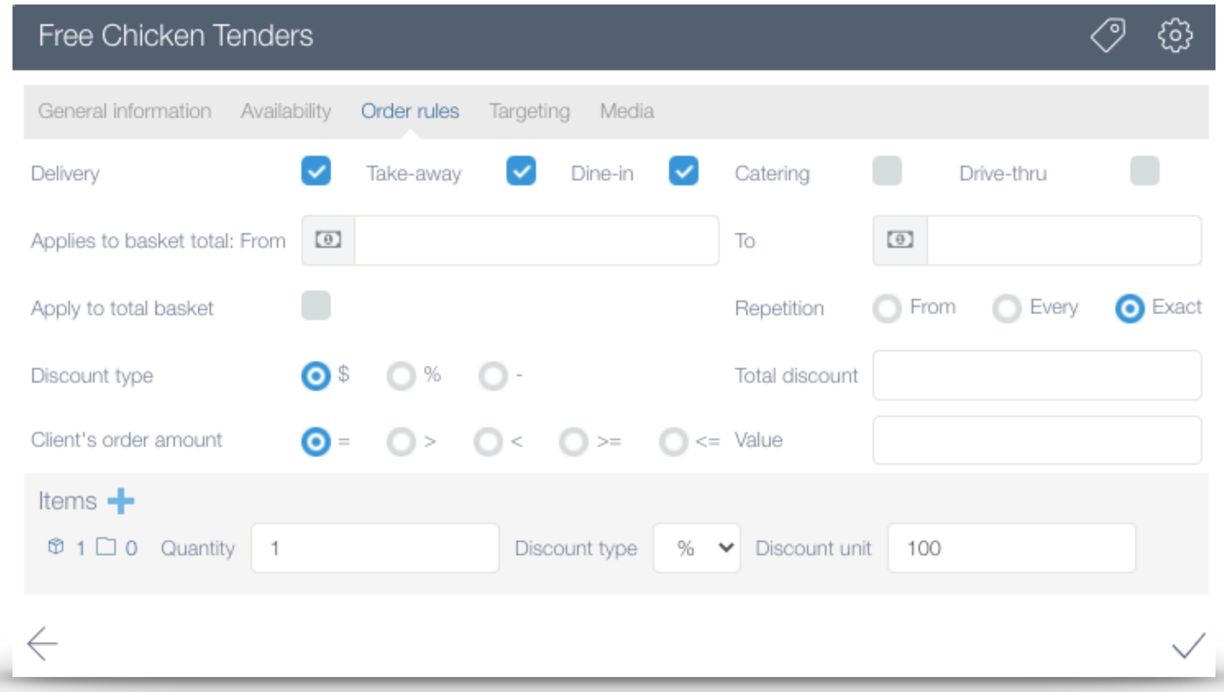
- **Days Availability** – Choose between every day or specific date range (eg. every Thursday). The From - To choice above is also taken into account. If, for example, you have set the offer to be valid for the month of October and you choose the availability of days on Thursday, then it will be available only on Thursdays in the month of October.

- **Store Availability** – In which stores the offer will be available.
  See how to manage locations

- **Distribution channels availability** – Set the distribution channels that you would like the offer to be displayed (e.g. Web, iOS, Android, POS and so on).

- **Section availability —** Set the sections that you would like your offer to be displayed on the website (e.g. only to offers category, only to products category or both).

Sub Tab: Order Rules



- **Delivery Method** – Select the delivery methods in which the offer will be available.

- **Applies to basket total** – Choose if you want to relate the offer to the total of the basket. If you choose this option in order to apply the offer to the basket total, you define the price range (eg. Set the offer to be applied to the whole basket for purchases from 25 to 35 euros).

- **Apply discount on total basket** – Select this checkbox if you would like the offer to be applied to the whole basket total as mentioned above, otherwise, leave it unchecked.

- **Repetition** –
  - a) From: The offer is applied after X quantity that is added in the basket eg if you have an offer like “Buy more than 2 Pepsi and get a 20% discount on all of them” then the From field should be set as 2.
  - b) Every: The offer is applied every time the customer adds the products that correspond to the offer in their cart.

- c) Exact: The offer is applied only once, only the first time that the customer will use it from the moment it is created in the system and will be available to customers.

- **Discount Type** –
  - a) $: Default price (eg. It costs the customer 10 euro)
  - b) % : Percent discount (eg. -10%)
  - c) - : Quantitative discount (eg. - 5 euro)

- **Client's order amount** – Choose after or until how many orders this offer will appear. Define the quantity of these orders from the Value field. Suppose you set a quantity of 10 orders in Value field, then:
  - = This offer will appear on the customer's 10th order
  - > This offer will appear from the 11th order of the customer and above
  - < This offer will appear from the first to the 9th order of the customer
  - >= This offer will appear from the 10th order of the customer and above
  - <= This offer will appear from the 1st to the 10th customer's order
  - If the value field is null or 0 means that the offer will appear from the 1st customer's order.

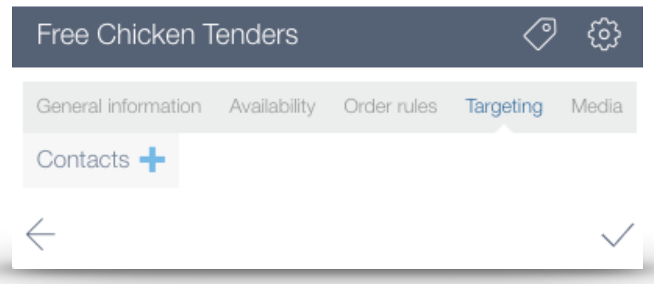
- **Items** – Select the categories / products / sizes that you want them to be included in the offer. If in a tier you choose more than one product category, it means "either one **OR** the other". So, if you choose the Pizzas and the Calzone in a tier, this means for the customer that whether they get Pizza or Calzone, the offer will be activated, but not both together. If you want them to work separately (both), eg. Pizza **AND** Calzone, then you should choose each category / product / size in a different tier.
  See how to manage product categories, See how to manage products, See how to manage sizes

- **Quantity** – Choose the quantity of the product that falls under the offer. If, for example, the offer defines that with TWO pizzas and ONE choco cratch the customer receives a 1.5 liter soft drink as a gift, then in the first tier with the pizzas you should put a quantity of 2, in the second with the choco cratch you should put a quantity of 1 and in the 3rd tier with the soft drink (your gift to the customer) you also put quantity 1.

- **Offer Discount Total** – Add the value that you want as a result from the discount in the basket, since it concerns generally the products of the offer and not a separate product. Meaning, in an offer where the customer buys 2 pizzas, a choco cratch and a 1.5L soft drink and gets a 20% on their order, then you should fill in the 20 in the Total Discount field and define the percentage % type in the field of Discount Type.

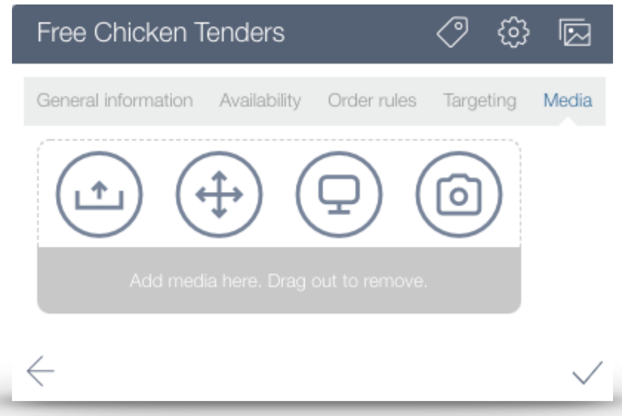
- **Offer Discount Unit** – Add the value that you want as a result from the discount in the basket, if it concerns separately one or some of the products in the offer and not in general. Meaning, in an offer where the customer buys 2 pizzas & a choco cratch and gets a gift of a 1.5L soft drink, then you should go to the tier of the soft drink, to define as a type of discount the percentage discount of 100%, and in the field Offer Discount Unit you should put 100 in order for the customer to get 100% discount (meaning free) on this specific product. The same applies if the discount on a product is in euro or you would like some fixed price (eg. to take the soft drink at 0.50 cent).

Sub Tab: Targeting



- **Contacts** – If the offer is Automatic, Guided and Targeted, here you select the customer or customers to whom the specific offer will be available.
See how to manage customers

Sub Tab: Media



- **Media** – Upload the photo of the directed offer, by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photo you uploaded, will be displayed on the respective channels (eg. Website, mobile apps, etc.).

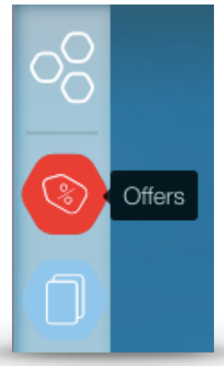
5. After adding a new offer, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Coupons Management (Offers app)

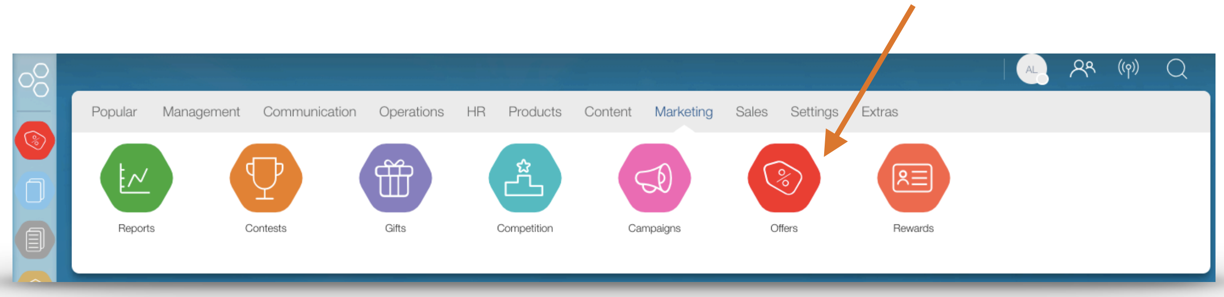
In Fimble you can easily create different types of discount coupons for your customers. Thanks to this, you will increase sales in your restaurant and gain customer loyalty.

Adding Coupon

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Offers app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

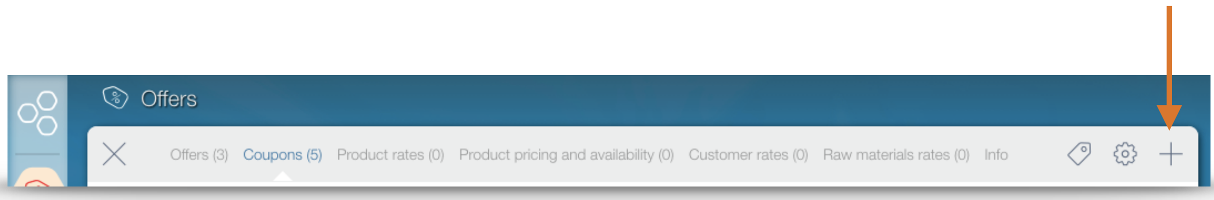


2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Offers app** inside.

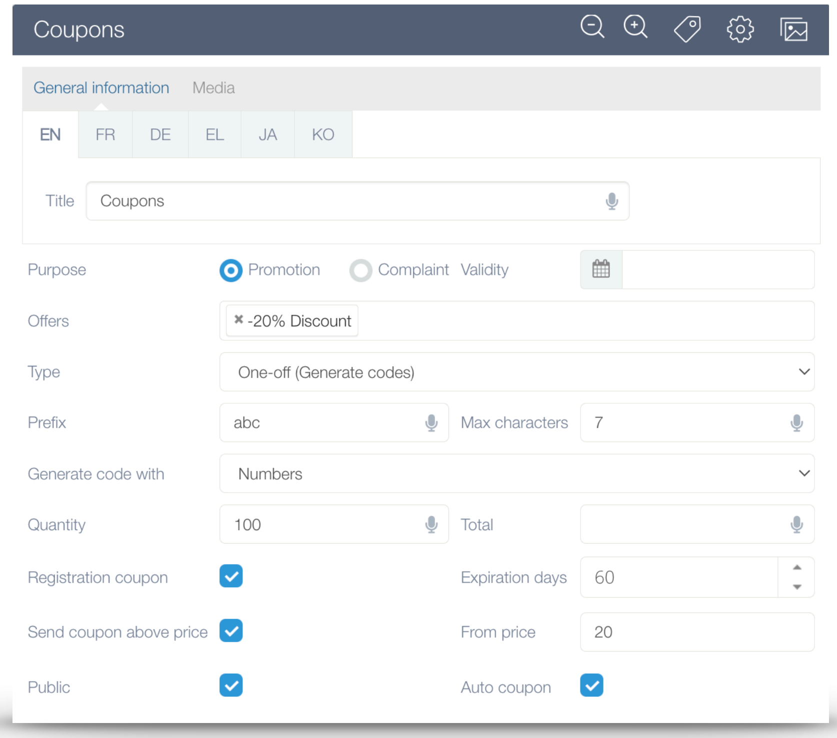


3. Launch the **Offers app,** select the **Coupons tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the coupon, otherwise it cannot be used in the checkout in your restaurant website or mobile application.

4. You should fill in, among others the following sections:



Sub Tab: General Information



- **Title** – Add the coupon title (it will appear on the website, at the checkout when the Coupon is activated).

- **Coupon Purpose** – Choose whether the coupon is a Promotional product or a Complaint reward for a customer.

- **Validity** – Choose Coupon Duration. If you do not select, then the coupon will be valid until you remove it and / or until the coupon codes are exhausted.

- **Offers** – Select the Offer / Offers (for Offer Type: coupon) where the coupon is attached.
  See how to manage offers

- **Type** – You can choose between the Coupon Types:
  - a) Recurring: A unique coupon code which can be used multiple times from all the users. You can also set the maximum capacity of the coupons and/or also set the usage limit per registered customer.

- b) Generate codes (one-off): Create codes, by defining a Prefix, a set of characters (Maximum Characters), a set of codes (Quantity & Total) and a type of structure (Generate code with) > a) numbers, b) characters, c) alphanumeric
- c) Generate codes with stepper: You should create codes, defining a Prefix, a set of characters (Maximum Characters), a set of codes (Quantity) and a type of structure (Creating a code with) > a) numbers, b) characters, c) alphanumeric as well as the step by which they will be generated. If, for example, we put 2 in Step, then the codes will be generated by 2 digits (eg CB002, CB004, CB006, etc.)
- d) Generate codes after import: In the relevant text area that opens, you should fill in / paste the coupon codes that you want them to be generated by separating them with a comma (without a space between the codes)

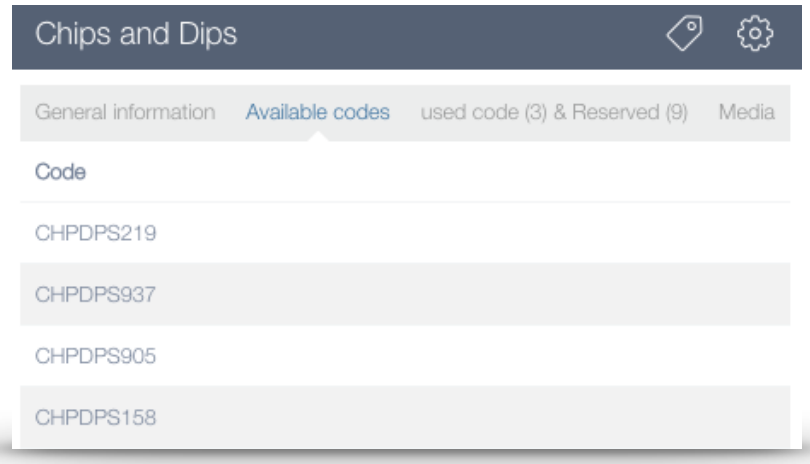
- **Public** - Select the Public checkbox in order for the coupon to be visible on predefined distribution channels.

- **Registration Coupon** - Select the Registration Coupon checkbox If it is a coupon that is given to the customer during their registration in the website or mobile applications. You can also fill the Expiration date field to set an amount of expiration days of the respective coupon.

- **Send coupon above price** - Select this checkbox if you want to assign a coupon to a customer order whose order total is more than the amount that you filled in the From price field. Also, an informational email is sent to the customer that fulfils the above requirements.

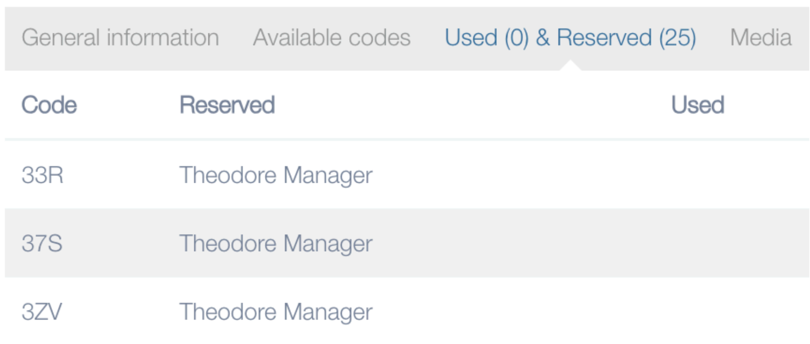
- **Auto Coupon** – When a customer selects an "auto coupon" at the checkout, then the system automatically adds the offer to the cart in which the specific coupon is matched without the customer having to add it manually to their basket.

Sub Tab: Available Codes



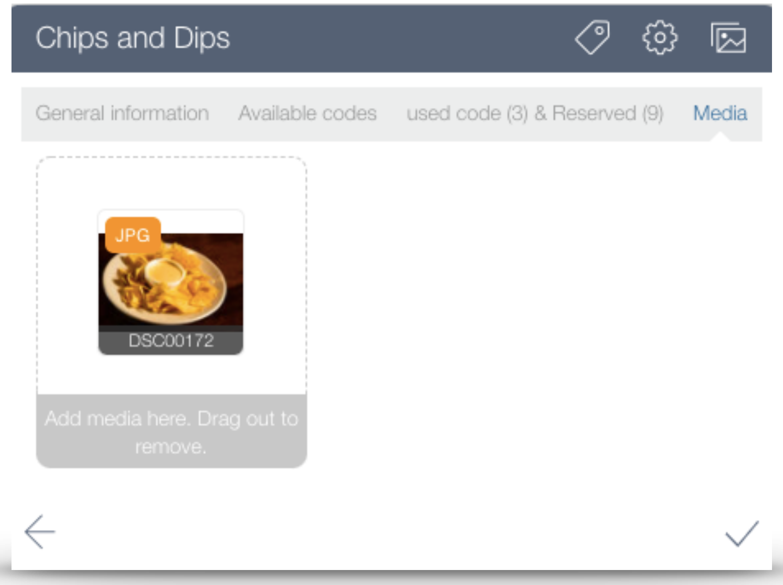
Here are the codes that are available for use by customers. If, for example, in the coupon we have set codes with CB willingness, set of max. 6 characters, type alphanumeric and quantity 100 and the 60 codes have been used, here it will show you the remaining 40 codes (eg. CB1234, CB5678, CB4321 etc.) which have not been "burned" yet.

Sub Tab: Used & Reserved



Here you will see the codes that were used - redeemed by customers and cannot be reused.

Sub Tab: Media

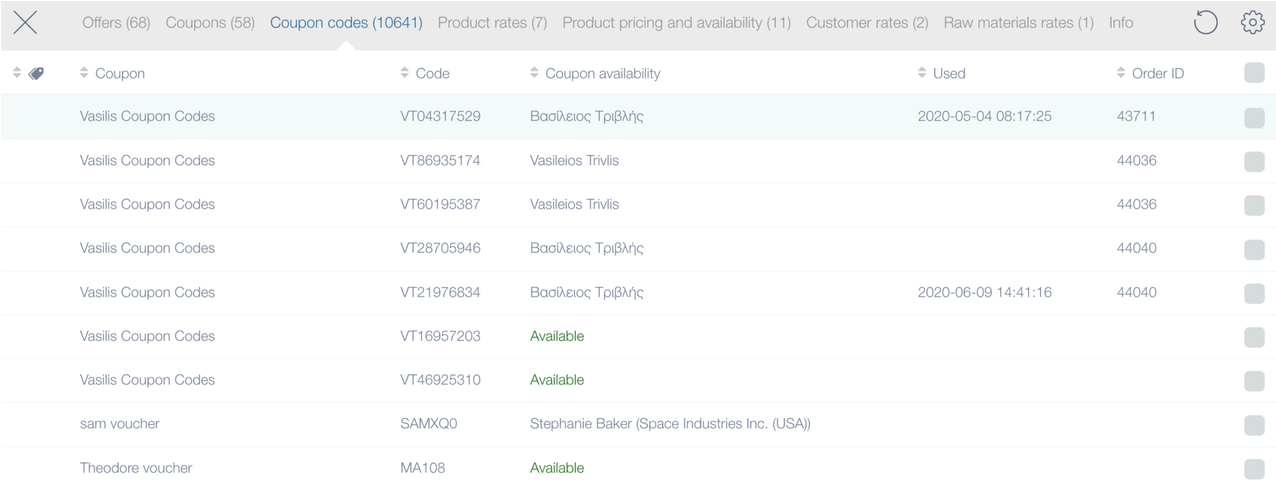


- **Media** – Upload the photo of the coupon, by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photo you uploaded, appears on the website in Profile: My Coupons.

5. After adding a new coupon, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Coupon codes

Launch the **Offers** app and select the **Coupon codes** tab. This tab is an overview of all of the coupons that you've created providing the below information:



Coupon	Code	Coupon availability	Used	Order ID
Vasilis Coupon Codes	VT04317529	Βασίλειος Τριβλής	2020-05-04 08:17:25	43711
Vasilis Coupon Codes	VT86935174	Vasileios Trivlis		44036
Vasilis Coupon Codes	VT60195387	Vasileios Trivlis		44036
Vasilis Coupon Codes	VT28705946	Βασίλειος Τριβλής		44040
Vasilis Coupon Codes	VT21976834	Βασίλειος Τριβλής	2020-06-09 14:41:16	44040
Vasilis Coupon Codes	VT16957203	Available		
Vasilis Coupon Codes	VT46925310	Available		
sam voucher	SAMXQ0	Stephanie Baker (Space Industries Inc. (USA))		
Theodore voucher	MA108	Available		

- **Coupon** - The title of the coupon

- **Code** - The code of the coupon

- **Coupon availability** -

  - a) Available: This means that the respective coupon is still available to be reserved & used

  - b) Customer's name: If instead of available there is a name, that means that a customer has already reserved the respective coupon (Used column must have no record)

- **Used** - The date that the coupon was used

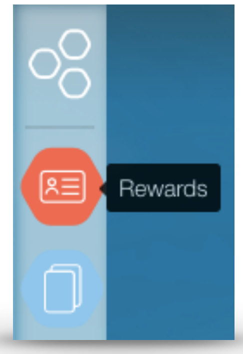
- **Order ID** - The order in which the coupon was used.

Loyalty Program

Loyalty Program Management (Rewards app)

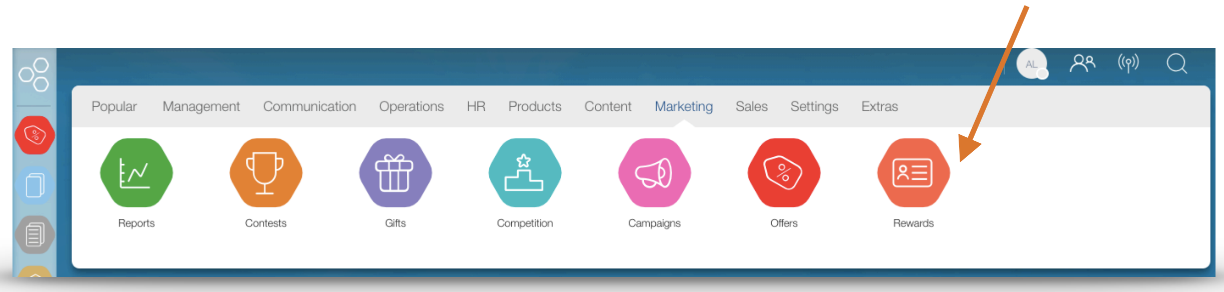
Fimble allows you to reward active customers of your restaurant. Loyalty programs are effective means to increase your sales and loyalty with your customer franchise.

Creating Loyalty Program

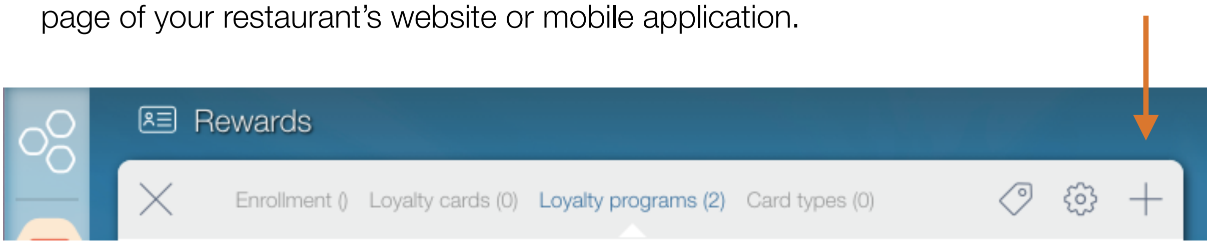


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Rewards app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

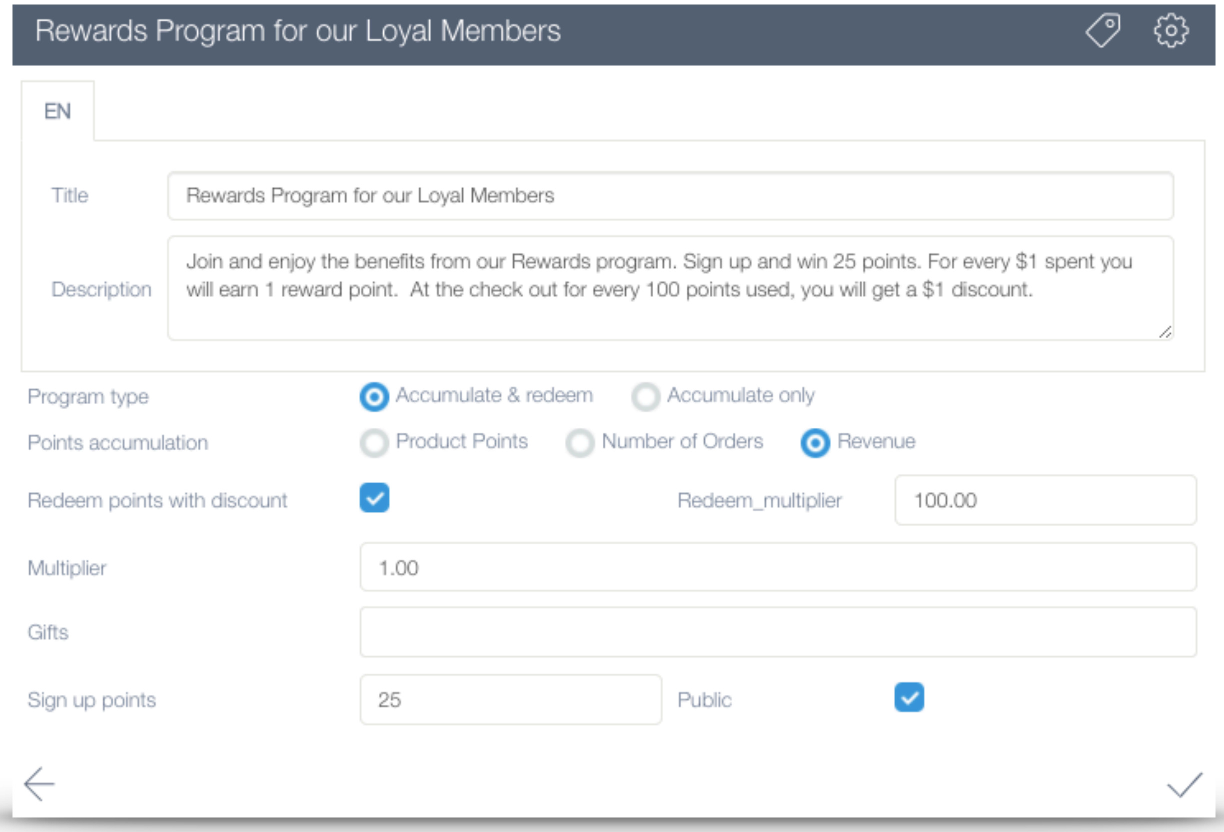
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Rewards app** inside.



3. Launch the **Rewards app,** select the **Loyalty Programs tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the loyalty program, otherwise it will not be visible and cannot be used in the loyalty page of your restaurant's website or mobile application.



4. You should fill in the following sections:



- **Title** – Add the loyalty program title (eg. Best Restaurant Loyalty Club).

- **Description** – Add the loyalty program description, give a compelling reason for your customer to enroll in the loyalty program. This information will be visible in the enrollment / loyalty program page on the website and mobile app (eg. Sales Revenue Program. $1 = 1 Point).

- **Program Type** – Select whether this program is for a) accumulation and redemption (customers accumulate points while ordering and also are able to redeem their points to gain discounts and gifts) or b) for accumulation only.

- **Points Accumulation** – Select how the customers earn points. This can be achieved in three different ways: 1. Product Points: earn a specific number of points per product bought (each product gives a specific amount of points once bought), 2. Number of orders: win a specific number of points per order, 3.

Revenue: earn a specific number of points per 1€ / 1$ etc. spent.

- **Redeem Points with Discount** – Check this option if you would like your customers to redeem points and gain discounts. The points redemption can be applied at the checkout.
  - **Redeem Multiplier** – Set the amount of points that correspond to 1 € / $ etc. discount for the customer. E.g. If the Redeem Multiplier is 100 then, 100 loyalty points equals to 1 € / $ etc for redemption.

- **Multiplier** – Set the number of points that the customer will win for every € / $ etc. (This applies only in Number of orders & Revenue types and it's only for accumulation).

- **Gifts** – The gifts that are available for redemption when enrolled on this specific program.
  See how to manage gifts

- **Signup Points** – The points earned when signing up.

- **Loyalty Levels (Accumulate only)** –
  - **Title** – Add the loyalty level title (eg. Gold, Silver etc.).
  - **Points** – Add the "target" points needed in order for the customer to accumulate to reach each loyalty level.
  - **Discount %** – Add the percentage of discount the customer earns when they accumulate the points needed for each loyalty level you set.

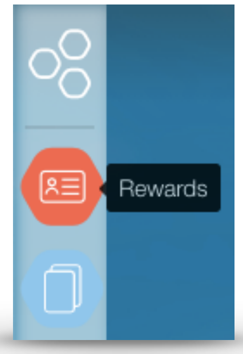
- **Public** – Select the Public checkbox in order for the loyalty program to be active on your online ordering system.

5. After creating a new loyalty program, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

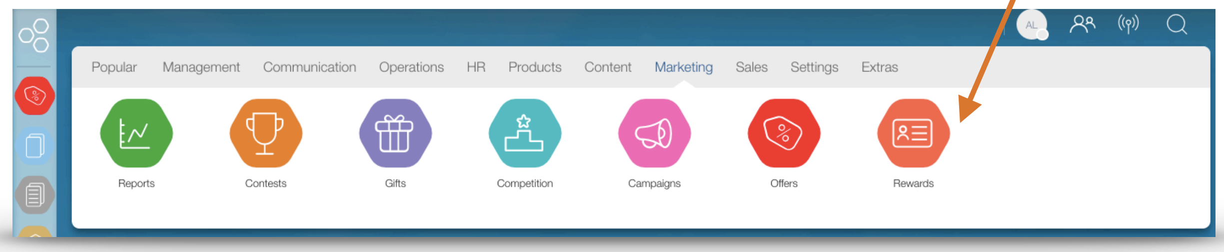
Enrollments

List of all the contacts enrolled in a Loyalty program and their enrollment dates.

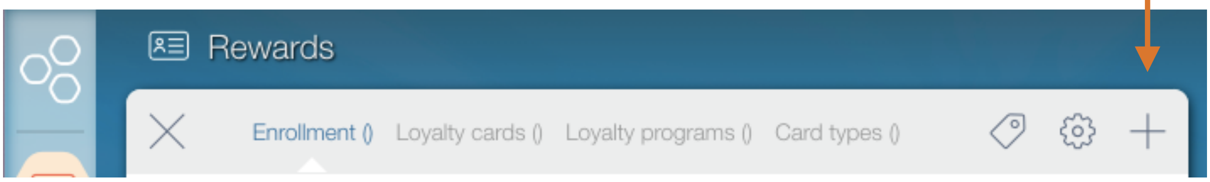
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Rewards app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



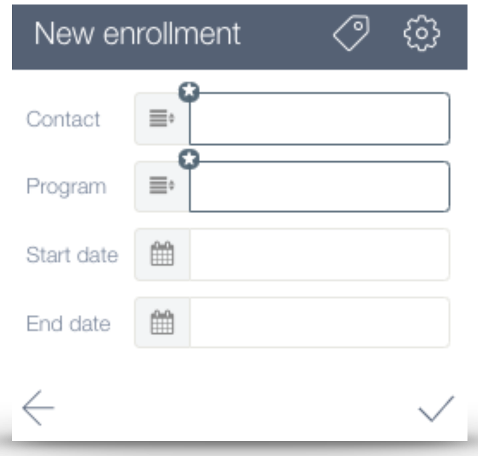
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Rewards app** inside.



3. Launch the **Rewards app,** select the **Enrollments tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for a new enrollment.



4. You should fill in the following sections:



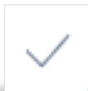
- **Contact** – Member enrolled in a loyalty program.
  See how to manage customers

- **Program** – Name of the loyalty program a member has been enrolled.
  See how to manage loyalty programs

- **Start Date** – The date a member enrolled in a loyalty program.

- **End Date** – The date a member was removed from a loyalty program.

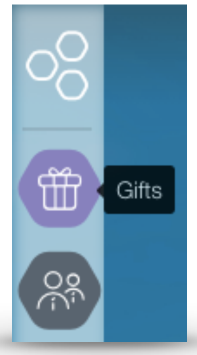
5. After adding a new enrollment, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



Gifts Management (Gifts app)

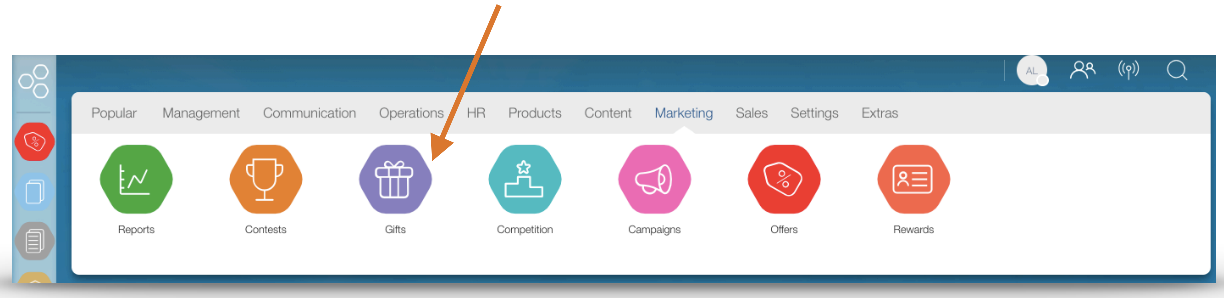
Fimble allows you to create rewards for your active customers of your restaurant. The customers can redeem their loyalty points which they gain by completing orders in your restaurant's website or mobile application and get rewards.

Creating Gift

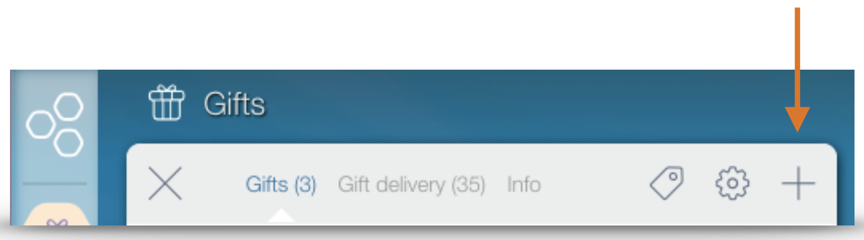


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Gifts app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

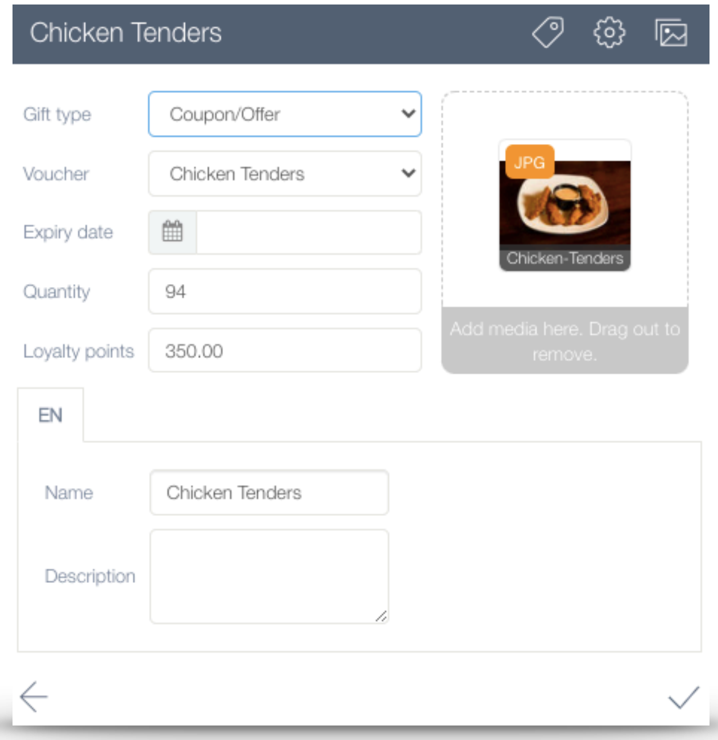
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Gifts app** inside.



3. Launch the **Gifts app,** select the **Gifts tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the new gift, otherwise it will not be visible in the loyalty page of your restaurant's website or mobile application.



4. You should fill in the following sections:



- **Gift Type** – Always choose the Coupon / Offer option. It matches the gift with a coupon. If the customer redeems loyalty points to take this type of gift they will receive a coupon on their profile -> Coupons section on the restaurant's website and mobile application and they will be able to redeem this coupon and get discounts while ordering.

- **Expiry Date** – Add the date when the coupon will expire and disappear from the loyalty program page in your restaurant's website and mobile application. You are able to change the expiration date as the gift will remain in Fimble and is not deleted.

- **Quantity** – The number of times that a gift can be purchased. If you set a number of 20, after the 20th customer who will redeem their loyalty points and get the gift, then the gift will expire and disappear from your restaurant's website and mobile application.

- **Loyalty Points** – The number of loyalty points a customer needs to redeem from their balance in order to get the gift.

- **Media** – Upload the photo of the gift, by a) drag and drop a media file, b) upload files from your computer or c) Insert files from the files app. The photo you uploaded appears on the website and mobile application.

- **Name** – Add the gift name. It will appear in the loyalty page on your restaurant's website and mobile application under the photo of the gift.

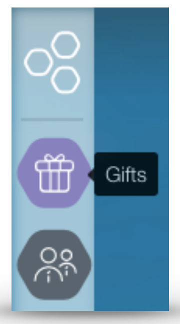
- **Description** – Add the gift description which is under the name, and it explains in a few words what the gift is about.

Note: In order for a gift to be displayed on the website, you must add it to the active loyalty program in the Gifts section.

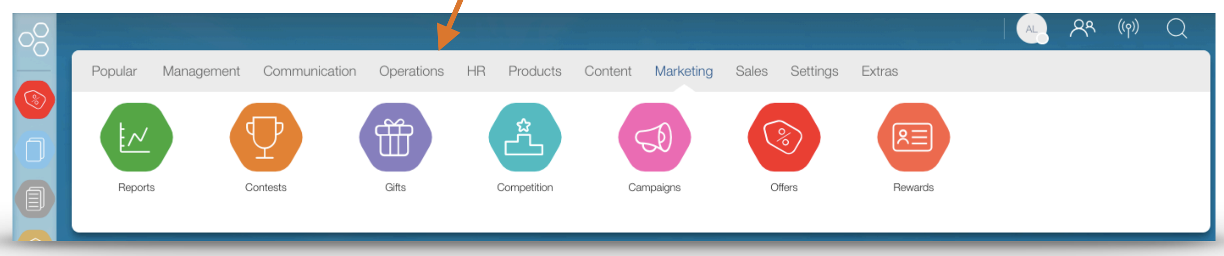
5. After creating a new gift, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Gift Delivery

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Gifts app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

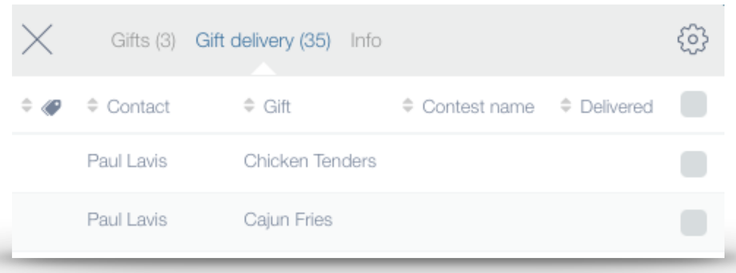


2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Gifts app** inside.

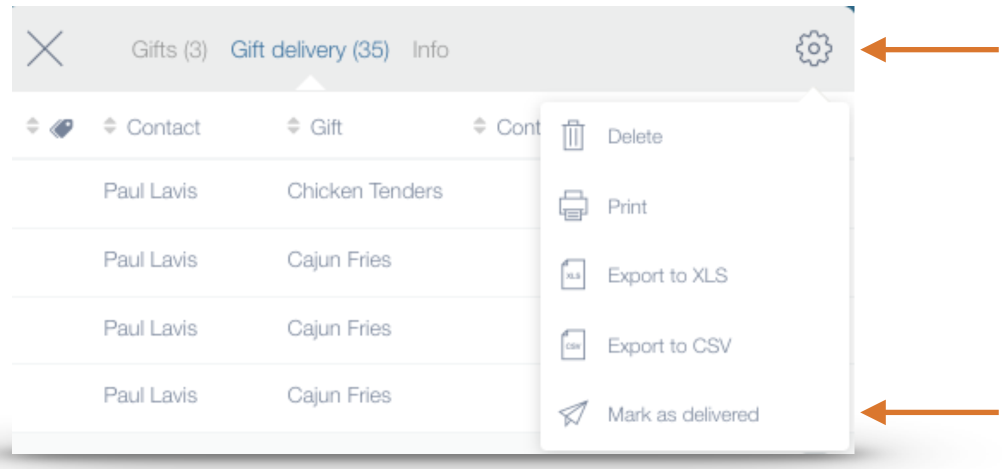


3. Launch the **Gifts app,** select the **Gift Delivery tab.**

4. Then you can see the list of all the customers who received the gift and what kind of gift it was. Also you are able to see if the gift was delivered to them or not yet.

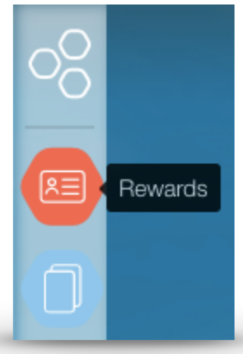


5. Once you have the list of customers who took the gift, you are able to mark the gift as delivered by going to the Gear on the top right corner of the Gifts app and select the Mark as delivered option, after you have selected all the customers with delivered gifts.



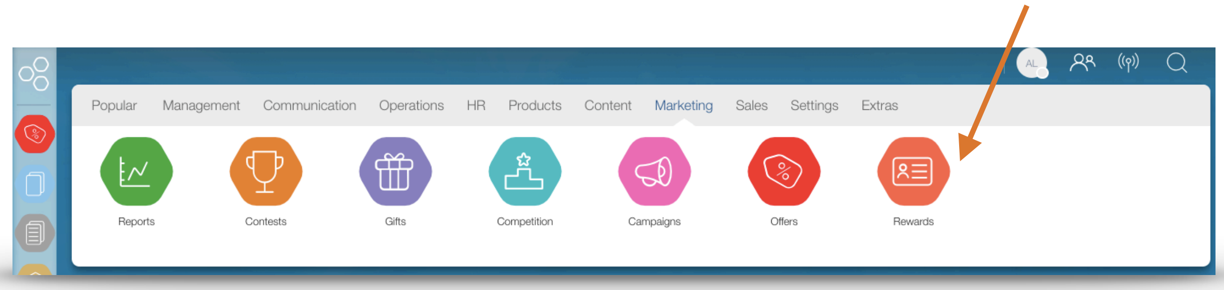
Loyalty Card Management (Rewards app)

Creating Card Type

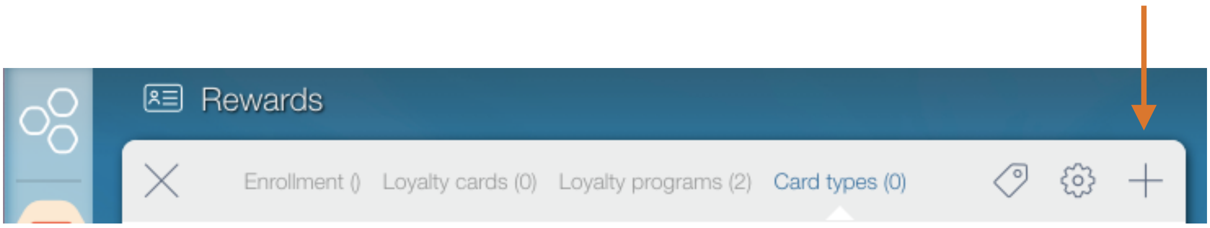


1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Rewards app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

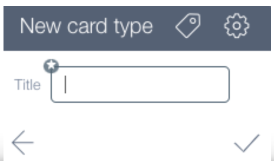
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Rewards app** inside.



3. Launch the **Rewards app,** select the **Card Types tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the card type, otherwise it cannot be used in the restaurant website.

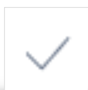


4. You should fill in the following section:



   - **Title** – Add the card type title (eg. Staff card).

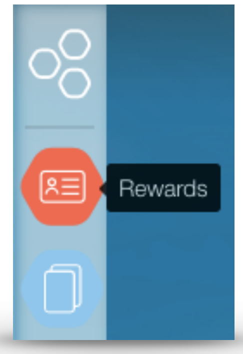
5. After creating a new card type, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



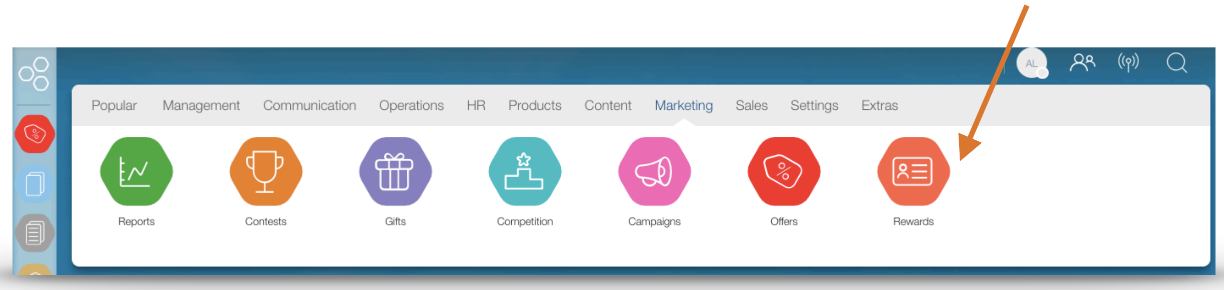
Loyalty Cards

List of all the loyalty cards owned by a customer with member details from whom the card was gifted, card number, card type, current balance and the card's validity date. The gift cards can be gifted from one contact to another, automatically given to a contact that meet the specified criteria or ad-hoc given to a contact by the admin through the Fimble system.

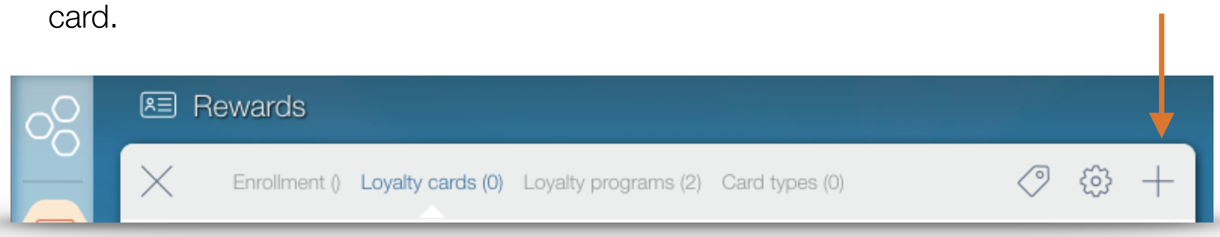
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Rewards app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



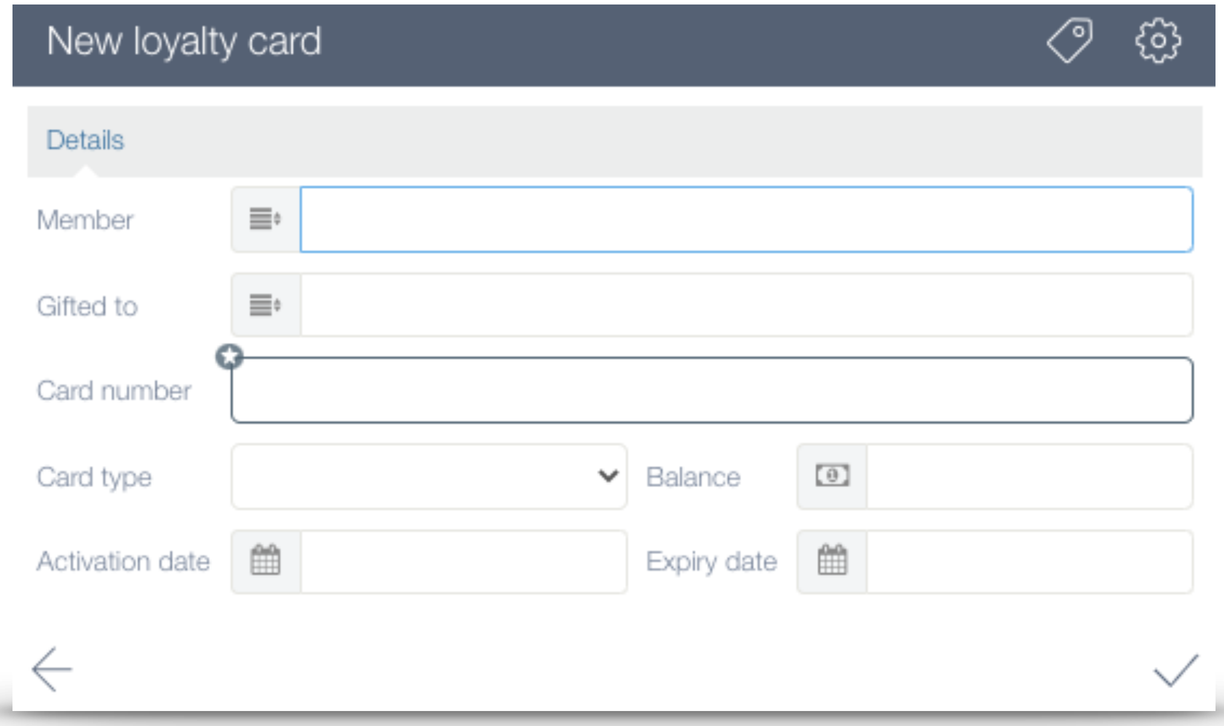
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Marketing Category** where you will find the **Rewards app** inside.



3. Launch the **Rewards app,** select the **Loyalty Cards tab** and press the "+" icon. It will open a new form where you are able to fill in the required fields for the loyalty card.



4. You should fill in the following sections:



- **Member** – The member who gives the loyalty card to another member.
  See how to manage customers

- **Gifted to** – The member who receives a loyalty card from another member.

- **Card Number** – Set the unique card number.

- **Card Type** – Select the card type you created before in card types section of Rewards app (eg. Staff card).
  See how to manage card types

- **Balance**– The current balance of the loyalty card in € / $ etc.
- **Activation Date** – Set the activation date for the loyalty card. The date that the loyalty card starts being used.

- **Expiry Date** – Set the expiration date for the loyalty card. The date that the loyalty card stops being used.

5. After adding a new loyalty card, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

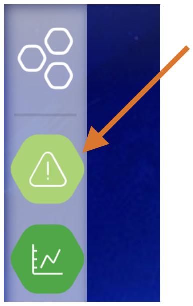
Tickets

Ticket-Complaint Management (Tickets app)

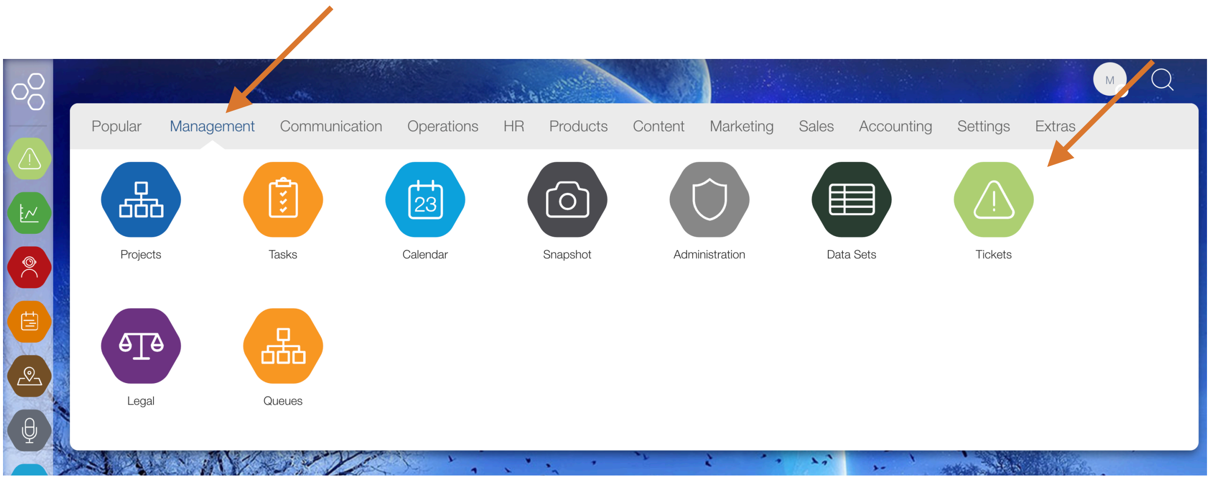
Fimble provides you with an easy way to manage your customers' complaints through the Tickets application. With a variety of features such as ticket categories, complaint types, ticket statuses, and more, you can get a clear picture of your customers' complaints and handle them the way you see fit.

Tickets can be used internally or externally. You can create a ticket and assign it to the appropriate person to handle, or you can receive a ticket from a customer through your website (as a complaint) and assign it to the appropriate person to handle as well.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Tickets app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Management Category** where you will find the **Tickets app** inside.



3. Launch the **Tickets app.** There you will see the available tabs through which you can manage your tickets.

How to setup Tickets

Adding / Editing ticket Categories

Categories are used to categorize the tickets/complaints based on your business's needs. For example, you could have a category: "Customers" and a Category: "Staff", so you can categorise the complaints based on the above tickets categories. This will help in reporting as well.

- Go to the **Categories** tab, press the "+" button to create a new category, write the title and press save "√".

- If you want to create a **sub-category** then click the main category and then click the "+", write the title of this sub-category and press save "√"

Adding / Editing Ticket types

You can create Ticket types like 'Bad Food Quality', 'Late Delivery', etc. to better manage your tickets and make them more convenient for your customers as well. To create or edit a Ticket type you should fill in the following.

- **Title** - Add the title of the complaint type

- **Category** - Match the category with the respective type, e.g. Category: "Customers", Ticket type: 'Bad Food Quality'

- **Priority** - Choose the priority of the specific Ticket type between Low, Normal or High

- **Estimated time of completion** - Select the estimated time of completion that the specific type should has

- **Assign to** -
  - Contact - If you choose the **Contact** option then you can assign this ticket type to a specific **assignee** of your choice and even add a **second assignee**. In this case, when a user or customer selects this type of ticket, the ticket is automatically assigned to the person you have already selected (as assignee).
  - Account level - If you choose the **Account level** option then you can assign this ticket type to a specific **Account level** (see Users - Access levels) and a **second Account level**. That means that every user and this account level will be assigned to the specific ticket type

- **Ticket Form** - If you want to request more information about a ticket, you can select the appropriate ticket form (which you have already created for this purpose through the Form app).

- **Default comments** - Fill in the default comments you want your users to see when they handle a specific ticket type

Adding / Editing Tickets

You can add a new ticket by clicking the "+" button in any of the My tickets, All tickets, Unassigned or Resolved tabs. Go to the inner tab **details** and select between an "Existing contact" or a "New contact" and follow the below steps:

Existing contact

Existing contacts means that a ticket is FROM a registered customer or existing user. To create a new ticket for an existing contact you should fill in some of the following:

- **From contact** - Select one of the existing users or customers that the ticket is coming from. For example, let's say you received an email from a (registered) customer who has a complaint because a product was of poor quality. You could create a new ticket in which you select the specific customer (In From contact field) and assign it to the right person to handle it.

- **Owner** - The user responsible for handling the ticket (the assignee).
- **Related to** - You can associate a ticket with a variety of choices, including Order, Product, Service, Store, Contact. For example, you can select the Product option and select the product the customer is complaining about (e.g. King Burger).

- **Ticket type -** Choose the appropriate type of ticket for the specific case (e.g. 'Bad Food Quality')

- **Priority -** Choose the priority of the specific Ticket type between Low, Normal or High

- **EDC -** Select the Estimated Date of Completion for the specific ticket

- **Completion** - The progress bar shows the progress of the ticket (range: 0 - 100)

- **Description** - Write the description/message of the ticket (in this case, the customer's message)

- **Private comments** - Write your comments for this ticket. These are internal comments and only the owner(s) of the ticket can see them.

New contact

New contact means that a ticket is FROM a new customer of new user. To create a new ticket for a new contact you should fill in some of the following:

- **First name, Last name** - Enter the first and last name of the contact

- **Email** - Enter the email of the contact

- **Phone** - Enter the phone of the contact

- **Address** - Enter the address of the contact

- **Owner** - The user responsible for handling the ticket (the assignee).

- **Related to** - You can associate a ticket with a variety of choices, including Order, Product, Service, Store, Contact. For example, you can select the Product option and select the product the customer is complaining about (e.g. King Burger).

- **Ticket type -** Choose the appropriate type of ticket for the specific case (e.g. 'Bad Food Quality')

- **Priority -** Choose the priority of the specific Ticket type between Low, Normal or High

- **EDC -** Select the Estimated Date of Completion for the specific ticket

- **Completion** - The progress bar shows the progress of the ticket (range: 0 - 100)

- **Description** - Write the description/message of the ticket (in this case, the customer's message)

- **Private comments** - Write your comments for this ticket. These are internal comments and only the owner(s) of the ticket can see them.

All tickets, My Tickets, Unassigned and Resolved tabs

The listers of the above tabs provides you with the below information:

- **Ticket ID** - The identification number of the ticket

- **Contact** - The contact from which the ticket was send. This applies to already existing contacts and/or registered customers

- **First Name, Last Name** - The contact from which the ticket was send in case it's a new contact

- **Ticket type** - The type of ticket that was selected by the user or customer for a specific case (e.g. 'Bad Food Quality')

- **Owner** - The user responsible for handling the ticket (the assignee).

- **Description** - The message/description of a ticket

- **Creation date** - The date that a ticket was created

- **Overview** - An overview of a ticket which includes: Ticket information, Contact details, Files related to the ticket and a Thread

- **Resolved** - If a ticket has a "√" in Resolved column then it means that it is resolved

<u>All tickets</u>

The "All Tickets" tab shows **all** tickets, regardless of whether they are assigned to you or other users, unassigned or resolved.

<u>My tickets</u>

The "My tickets" tab shows the tickets that are assigned to you, meaning you are the owner. Also, the lister provides the same information as in the All tickets tab.

<u>Unassigned</u>

The "Unassigned" tab shows the tickets that do not have an owner (assignee). If you want to assign a ticket to an assignee, open the ticket record and select one of the suggested assignees in the "Owner" field. This ticket will disappear from the Unassigned tab and will be moved to the owner's My Tickets tab (and to the All Tickets tab).

Resolved

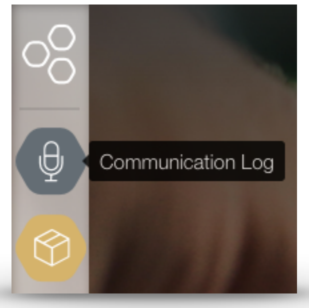
The “Resolved" tab shows tickets that have been resolved. To resolve a ticket, you must open a ticket record and select the Resolved checkbox (bottom left). This will move the ticket to the Resolved tab.

Communication

Communication Management (Communication Log app)

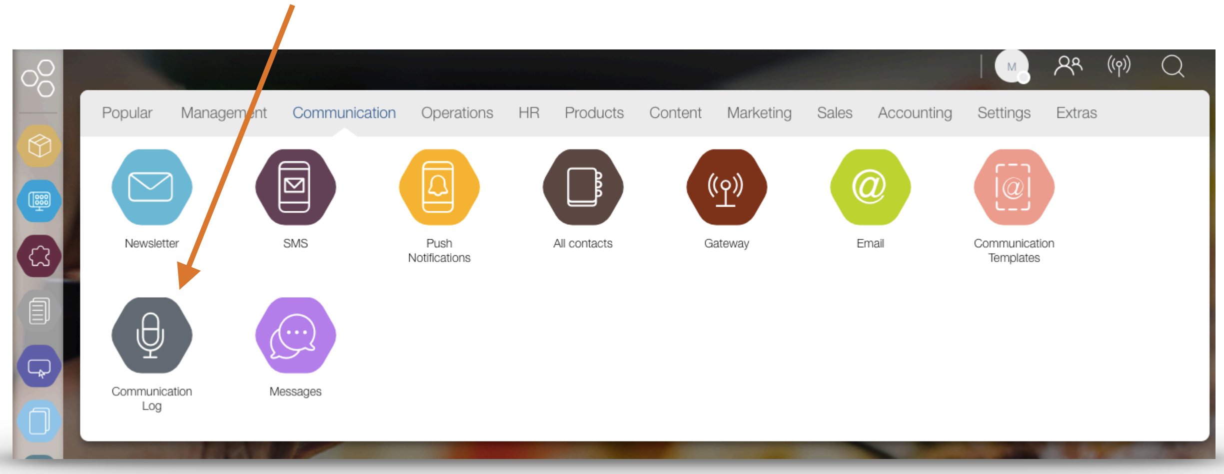
Fimble allows you to monitor a log of all communications sent by the system, and to record the callbacks that need to be made as well as to see the missed calls.

Adding / Monitoring Communication Log



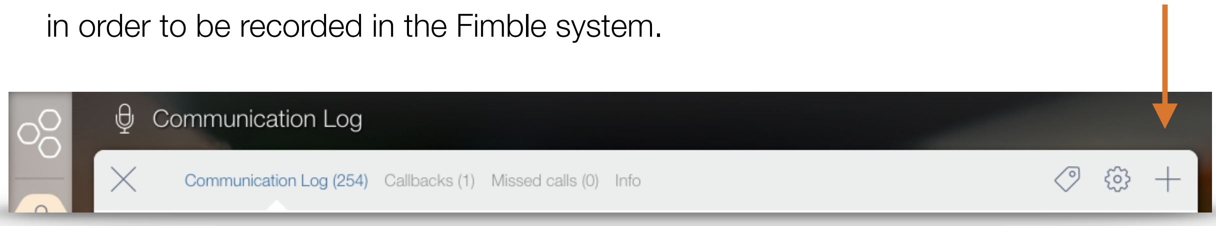
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Communication Log app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Communication Log app** inside.

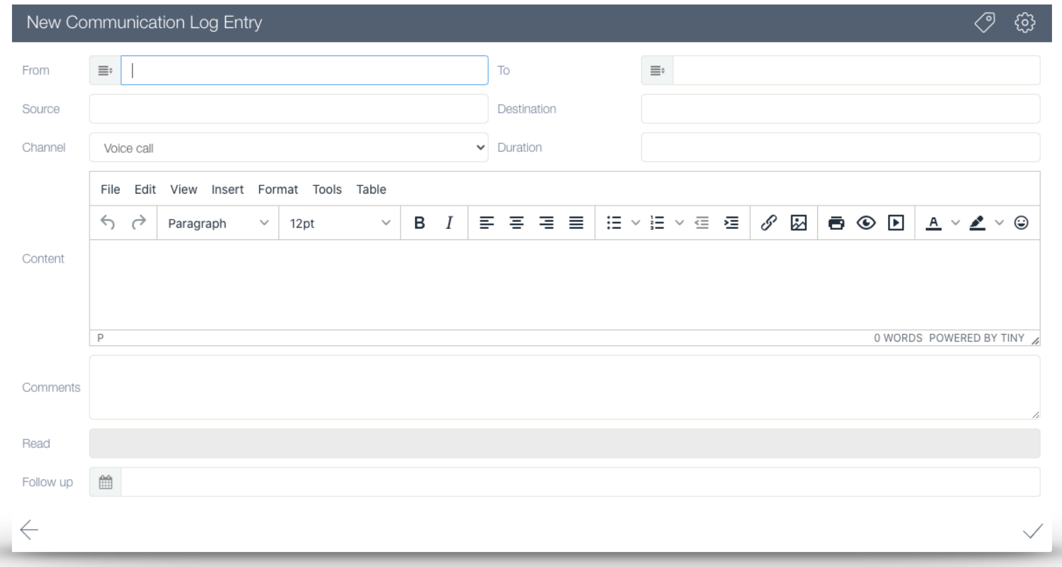


3. Launch the **Communication Log app,** select the **Communication Log tab** and either press the "+" icon to add a new communication that happened or just view the list with all the communication from the past. If you press the "+" icon it will open a new form where you are able to fill in the required fields for the new communication

in order to be recorded in the Fimble system.



4. You should fill in the following sections to add a new communication:



- **From** – Add the person (contact within the system) who started the communication.

- **To** – Add the person (contact within the system) who has been communicated by any means.

- **Source** – Add the source of the communication (eg. orders@eshop.com).

- **Destination** – Add the destination of the communication (eg. customer-name@gmail.com).

- **Channel** – Add where the communication initiated (eg. Email).
  [See how to manage communication channels](#)

- **Duration** – Add the duration of the communication.

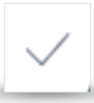
- **Content** – Add the content of the communication.

- **Comments** – Add any possible comments referred to the communication.

- **Read** – If the message was opened or not.

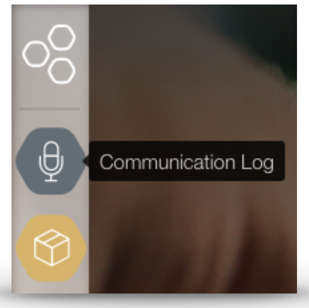
- **Follow Up** – Add the date that the responsible person from your team needs to follow-up on this communication.

5. After adding a new communication to the log, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

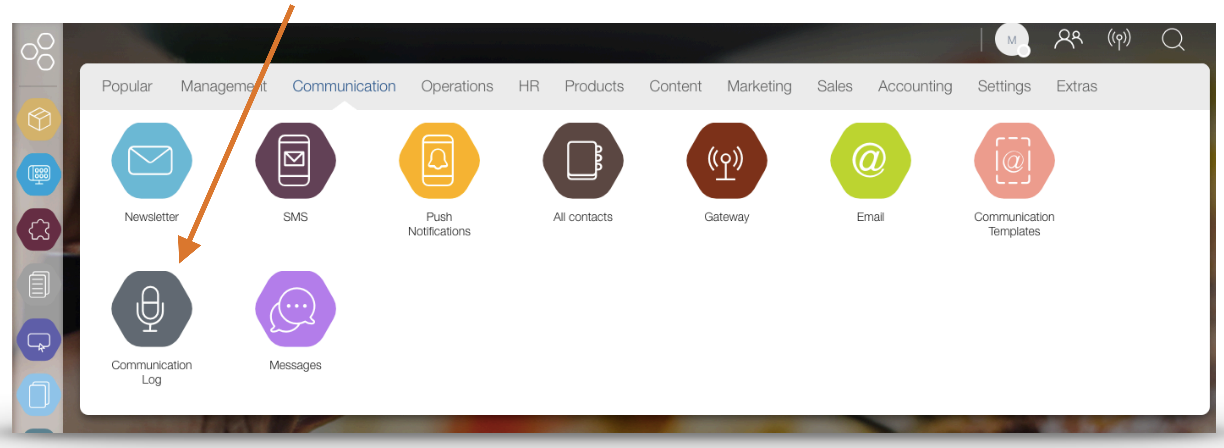


Adding / Monitoring Callbacks

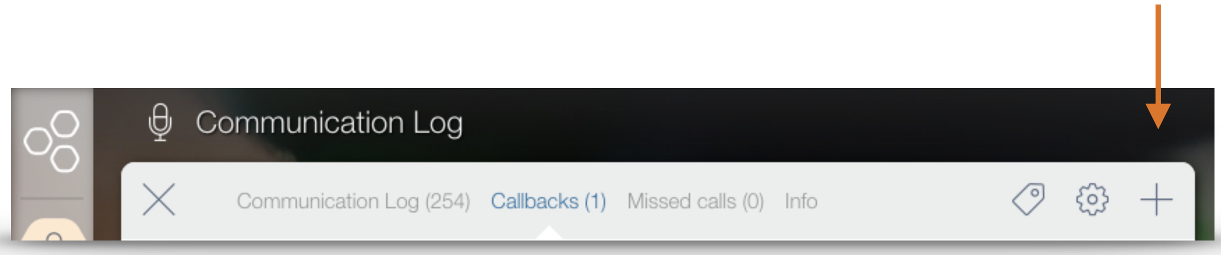
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Communication Log app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Communication Log app** inside.



3. Launch the **Communication Log app,** select the **Callbacks tab** and either press the "+" icon to add a new callback that needs to be made or just view the list with all the pending callbacks. If you press the "+" icon it will open a new form where you are able to fill in the required fields for the new callback in order to be recorded in the Fimble system.



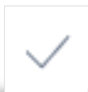
4. You should fill in the following sections to add a new communication:

    - **From** – Add the person (contact within the system) that needs to be called back.

    - **To** – Add the person (contact within the system) who needs to call back, the one who called, or needs to be called even if they did not call before, once the communication is initiated and recorded.

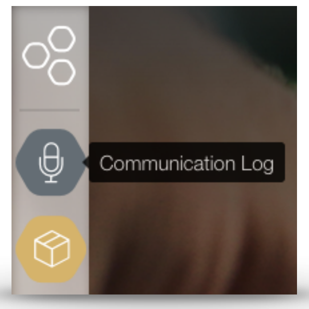
    - **Comments** – Add any possible comments referred to the communication.

5. After adding a new call back to the log, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

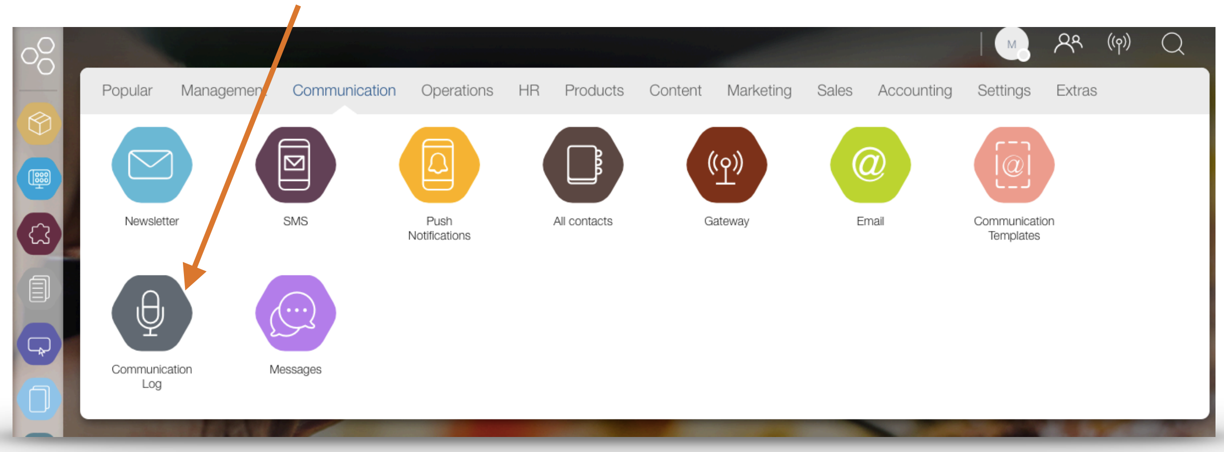


Adding / Monitoring Missed Calls

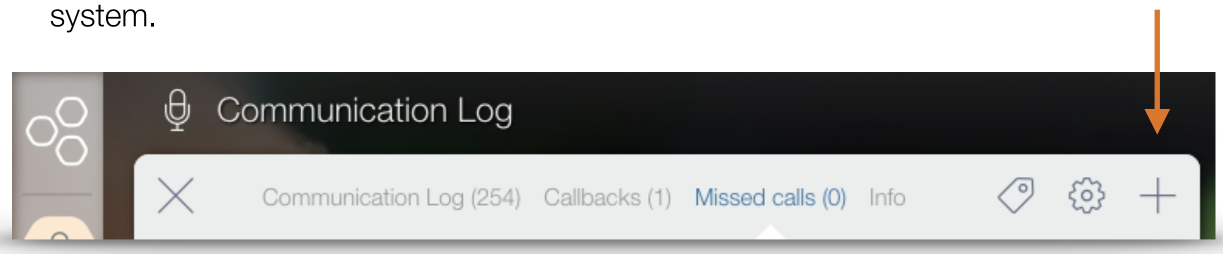
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Communication Log app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



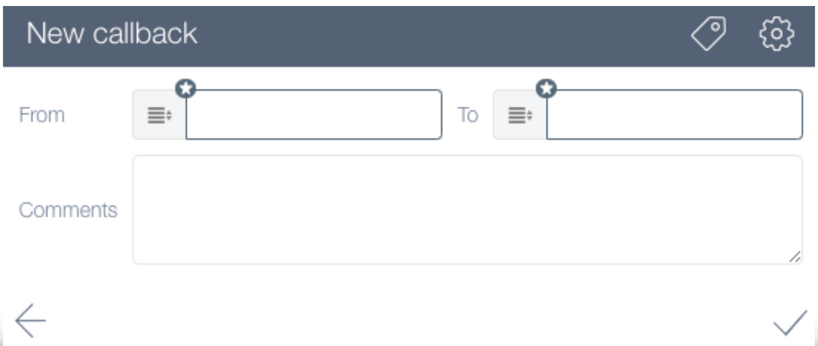
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Communication Log app** inside.



3. Launch the **Communication Log app,** select the **Missed Calls tab** and either press the "+" icon to add a new missed call that you need to evaluate if you will call back or just view the list with all the missed calls within the system. If you press the "+" icon it will open a new form where you are able to fill in the required fields for adding a new missed call that you noticed in order to be recorded in the Fimble system.



4. You should fill in the following sections to add a new missed call:



- **From** – Add the person (contact within the system) who called and their call has been missed.

- **To** – Add the person (contact within the system) who was called and they missed the call.

- **Comments** – Add any possible comments referred to the missed call.

5. After adding a new missed call to the log, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

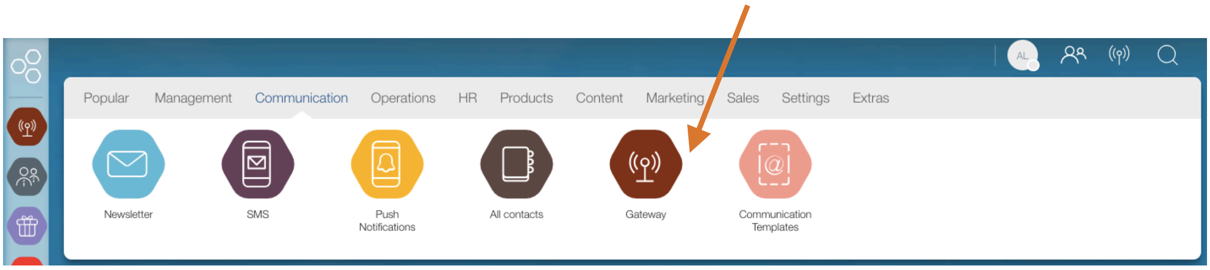
Communication Channels Management (Gateway app)

Fimble allows you to manage your communication with ability to create communication channels and set privileges for each user or level. Supports email accounts, printers, and sms channel managements among others.

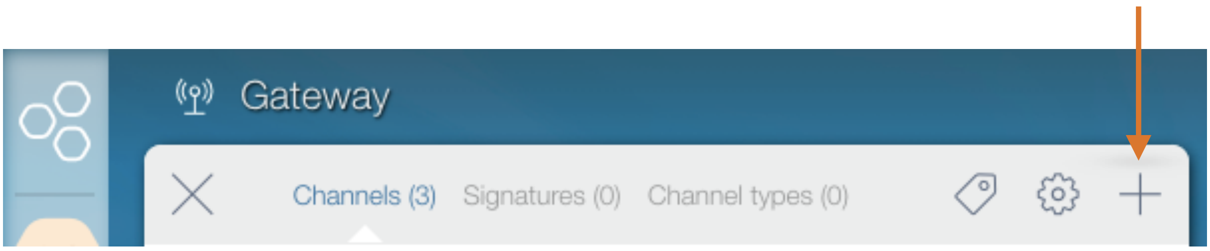
Creating a new Printer Channel

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Gateway app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

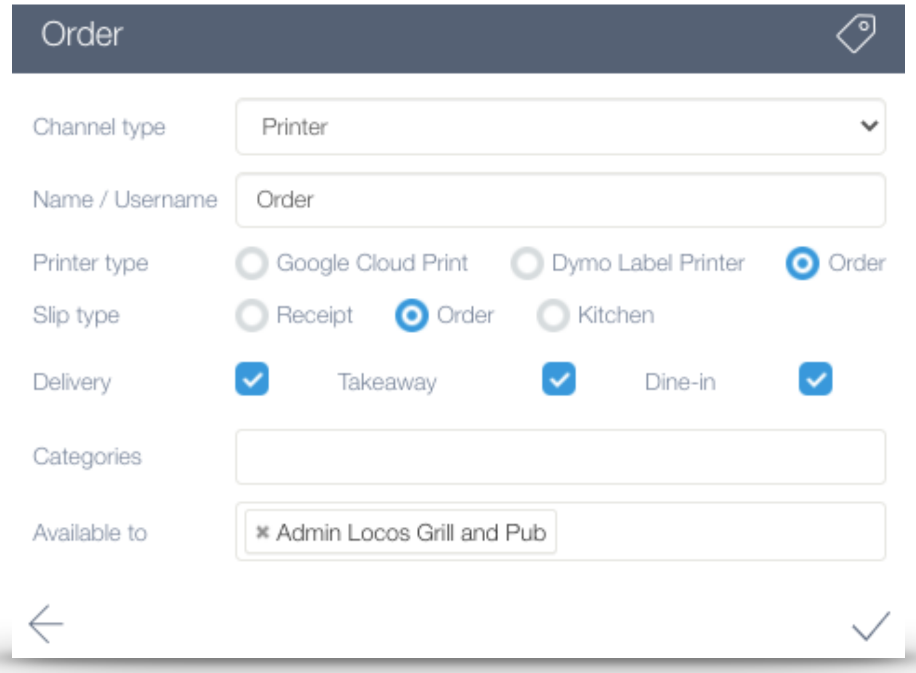
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Gateway app** inside.



3. Launch the **Gateway app,** select the **Channels tab** and press the "+" icon to add a new communication channel. It will open a new form where you are able to fill in the required fields for the channel.



4. You should fill in the following sections to create a new channel:



- **Channel Type** – Select the Printer channel type from the list.

- **Name / Username** – Add the name of the printer, we usually put the name of the position that the printer is placed in. For example 1. Kitchen, 2. Bar, 3. Cashier. “Name” will appear as a choice in Printerman’s environment when you set up a new location, setting names like “bar” when you will need to match it with a printer device will help you match easier.
  See how to print orders

- **Printer Type** – Select the Order option here. For Dymo Label Printer please contact us in order to make some setup on our side first.

- **Slip Type** – You can choose between the Slip Types:
  - a) **Receipt:** By selecting this slip type the channel will print receipts. Prerequisite for this in order to work is that you have connected the printer device with a tax mechanism. It is used for cashier printers.
  - b) **Order:** By selecting this slip type the channel will print order slips. Order slips are papers containing only the order products and no other tax information. It is used by bar employees, kitchen employees etc.

- c) **Kitchen:** By selecting this slip type the channel will print order slips again. The difference between this type and the “order” slip type is that you may have different settings for the kitchen. For example, in an order you may want to show only the name of the products and not the materials. Or just show materials only when the recipe is changed. So you can distinguish how the order slip is printed using the “order” channel and the “kitchen” channel.

- **Order Types** – Select which specific channel you would like to print or not based on the order type you selected. For example if you select delivery, only the delivery orders will be printing and not the takeaway ones. You can choose between delivery, takeaway, and dine-in.
  See how to manage order types

- **Categories** – The categories you will set in this field are the ones that will be printed from the printer. For example if you have an order with 2 cocktails, 2 pizzas and 2 salads, each printer (the one in the kitchen and the one in the bar) will print the categories you have matched it with. So the bar will only get the cocktails and the kitchen’s one will only print the food for example.
  See how to manage product categories

- **Available to** – Add which users can use this gateway channel. Fimble clients usually have been matched with their admin account to make this type of channel management. But there is also the possibility for the admin account to create more users and give them the appropriate permissions to use the Printerman software so in this case they will have to add them as well to this “Available to” field in order for them to have access.
  See how to manage users

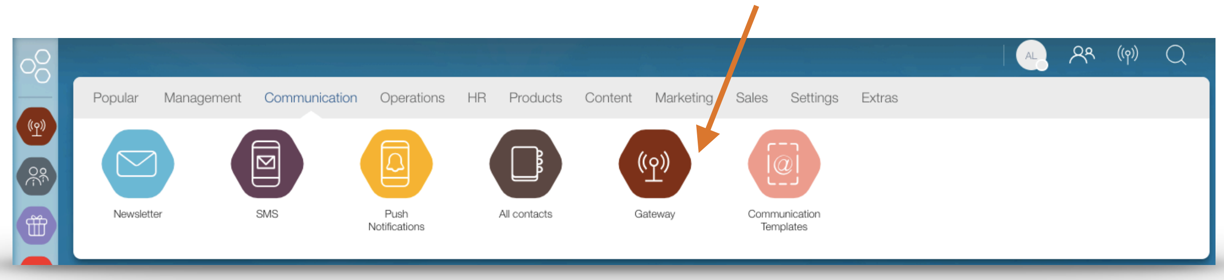
5. After adding a new printer channel, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Creating a new Email Channel

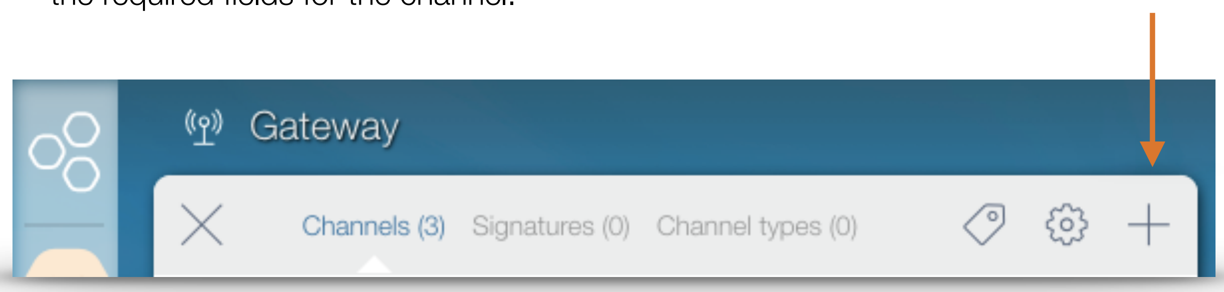
By creating an email channel you can use this specific email address you create in the entire fimble platform and use our your incoming / outgoing mail servers to send emails directly through the fimble platform. For example if you want to create a communication template and add an email sender there, or just to add an email sender to send the results of a survey form using the Forms application, you can use the email accounts you have previously created in the Channels tab of the Gateway application.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Gateway app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

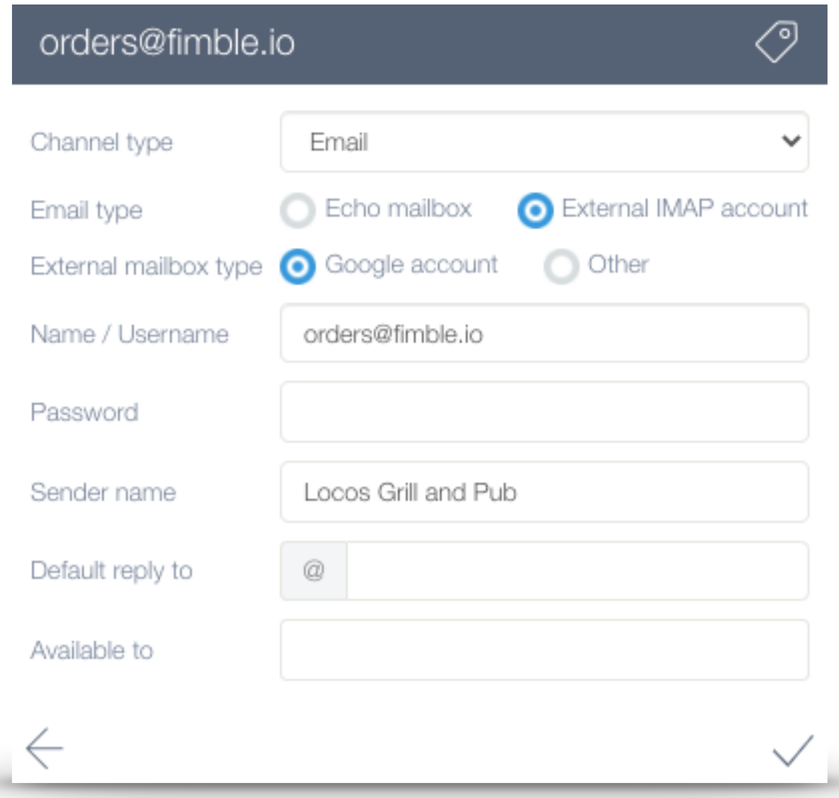
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Gateway app** inside.



3. Launch the **Gateway app,** select the **Channels tab** and press the "+" icon to add a new communication channel. It will open a new form where you are able to fill in the required fields for the channel.



4. You should fill in the following sections to create a new channel:



- **Channel Type** – Select the Email channel type from the list.

- **Email Type** – Select the External IMAP Account option here.

- **Echo Mailbox Type** – Select the Google Account or the Other option here. Depending on what you select you should fill in respective fields that are related to your email account setup in the fimble platform and you can ask for them from your email hosting provider.

- **Slip Type** – You can choose between the Slip Types:
  - a) **Receipt:** By selecting this slip type the channel will print receipts. Prerequisite for this in order to work is that you have connected the printer device with a tax mechanism. It is used for cashier printers.
  - b) **Order:** By selecting this slip type the channel will print order slips. Order slips are papers containing only the order products and no other tax information. It is used by bar employees, kitchen employees etc.

- c) **Kitchen:** By selecting this slip type the channel will print order slips again. The difference between this type and the "order" slip type is that you may have different settings for the kitchen. For example, in an order you may want to show only the name of the products and not the materials. Or just show materials only when the recipe is changed. So you can distinguish how the order slip is printed using the "order" channel and the "kitchen" channel.

- **Order Types** – Select if you want a specific channel to order specific delivery method orders. You can choose between delivery, takeaway, dine-in
  See how to manage order types

- **Categories** – The categories you will set in this field are the ones that will be printed from the printer. For example if you have an order with 2 cocktails, 2 pizzas and 2 salads, each printer (the one in the kitchen and the one in the bar) will print the categories you have matched it with. So the bar will only get the cocktails and the kitchen's one will only print the food for example.
  See how to manage product categories

- **Available to** – Add which users can use this gateway channel. Fimble clients usually have been matched with their admin account to make this type of channel management. But there is also the possibility for the admin account to create more users and give them the appropriate permissions to use the Printerman software so in this case they will have to add them as well to this "Available to" field in order for them to have access.
  See how to manage users

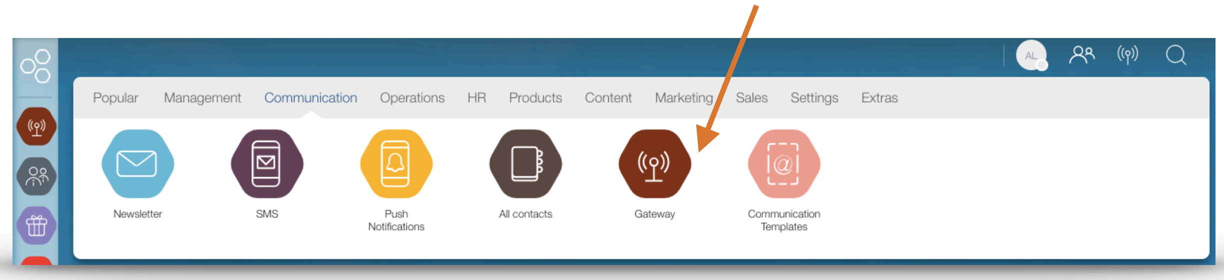
5. After adding a new email channel, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Creating a new SMS Channel

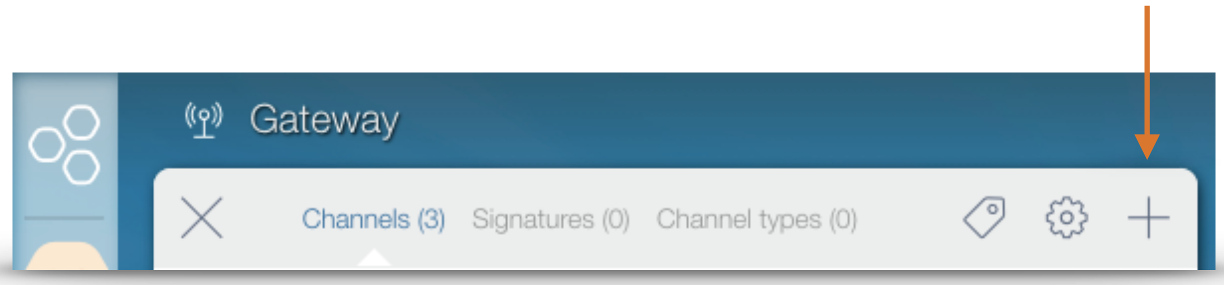
By creating an email channel you can use this specific email address you create to the whole fimble platform and use our or your incoming / outgoing mail servers to send emails directly through the fimble platform. For example if you want to create a communication template and add an email sender there, or just to add an email sender to send the results of a survey form using the Forms application, you can use the email accounts you have previously created in the Channels tab of the Gateway application.

1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Gateway app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.

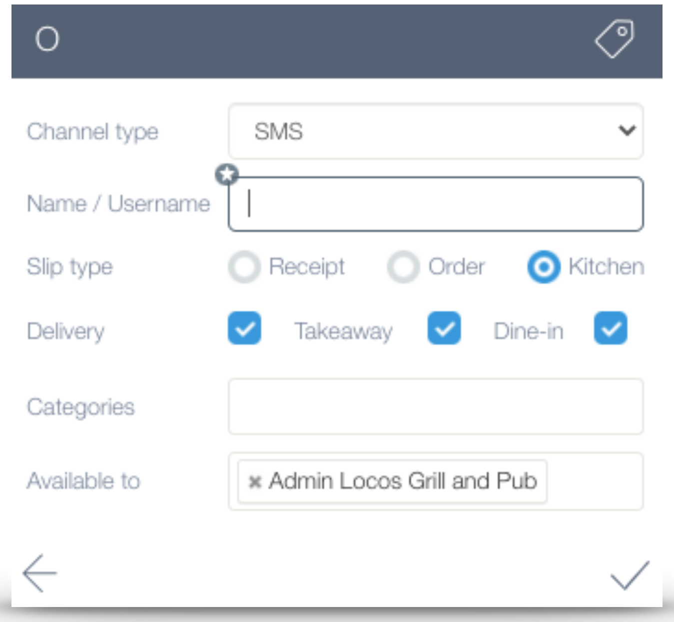
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Gateway app** inside.



3. Launch the **Gateway app,** select the **Channels tab** and press the “+” icon to add a new communication channel. It will open a new form where you are able to fill in the required fields for the channel.



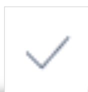
4. You should fill in the following sections to create a new channel:



- **Channel Type** – Select the SMS channel type from the list.

- **Available to** – Add which users can use this gateway channel. Fimble clients usually have been matched with their admin account to make this type of channel management stuff. But there is also the possibility for the admin account to create more users and give them the appropriate permissions to use the Printerman software so in this case they will have to add them as well to this "Available to" field in order for them to have access.
  See how to manage users

5. After adding a new sms channel, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



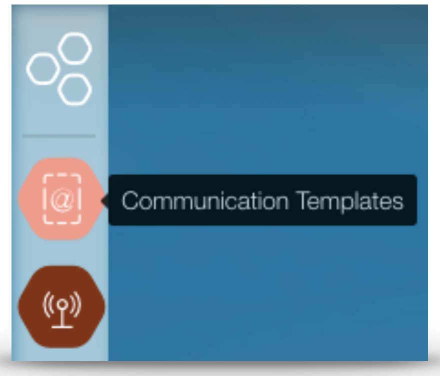
Communication Templates Management (Communication Templates app)

Fimble supports you with the management of multiple communication templates including Email, SMS and Push Notifications, etc. List of channels managed through the Gateway application from which the Emails, SMSs as well as Push Notifications will be sent. There are also identifiers used internally by the system through which it can link the template with a specific condition and when each one will be sent.

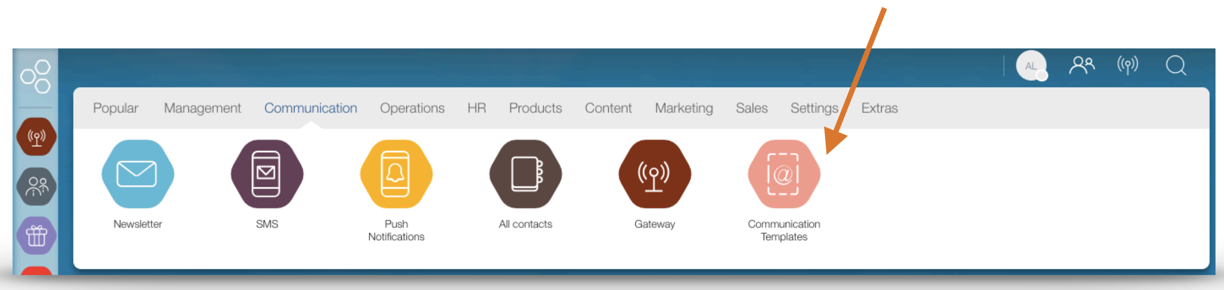
Email Templates Management

The user can set up here the content / message (template) of the emails that are automatically sent from the system on specific cases. These cases are hard coded, each one of them using a specific identifier which is the “tag” field which should not be changed on editing.

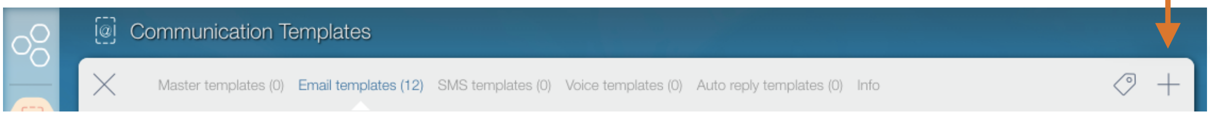
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Communication Templates app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Communication Templates app** inside.

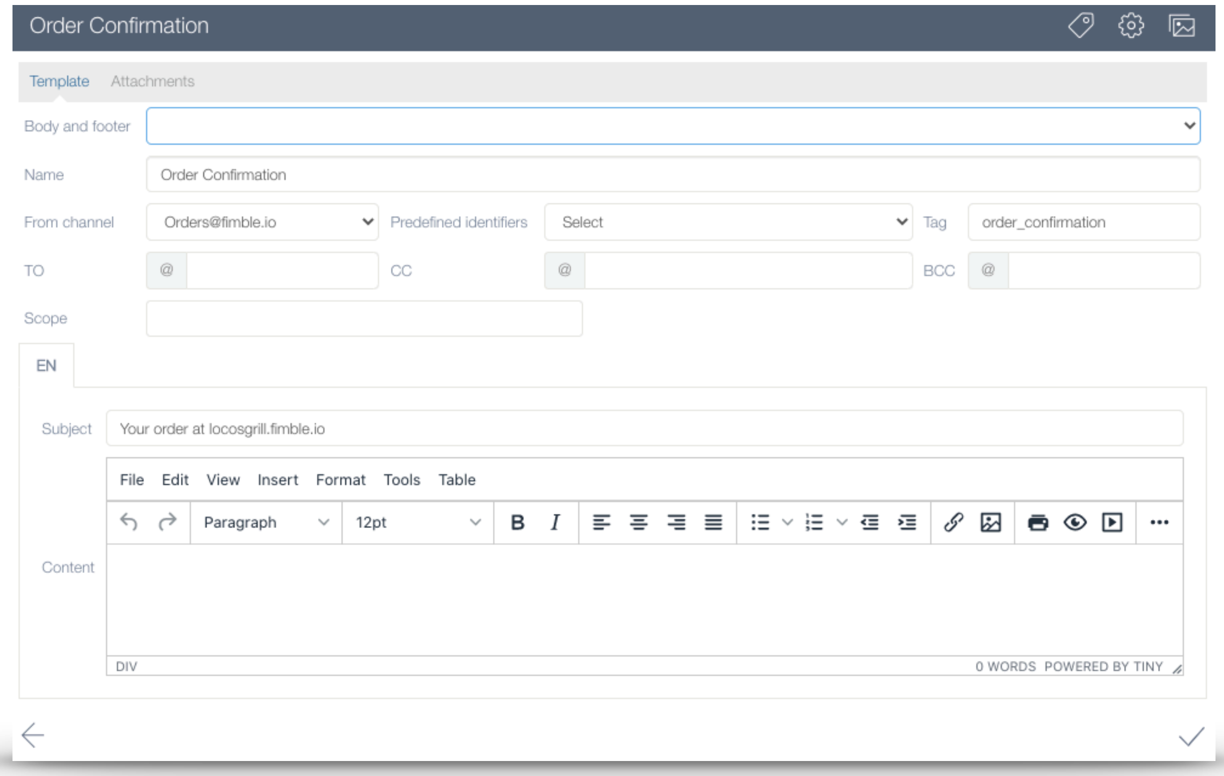


3. Launch the **Communication Templates app,** select the **Email Templates tab** and press the "+" icon to add a new email template. It will open a new form where you are able to fill in the required fields for the new email template in order to be handled by Fimble system when you want to send transactional emails to your customers like automated order confirmation emails or to manually send a marketing email to all your customers or a segment of your customers like an online survey to gather feedback from them.



4. You should fill in the following sections to create a new email template:

<u>Sub Tab: Template</u>



- **Name** – Add the email's template name. This is used for identification, search reporting, etc.

- **From Channel** – Add the email address where will be the sender of the email. In order to get the respective options in the dropdown, you will need to create a channel through the Gateway application.
  See how to manage communication channels

- **Predefined Identifiers** – The type of the email template. eg. “Thank you”, “Forgot Password” etc. - Choose an option from the predefined types in the dropdown list.

- **Tag** – A predefined tag that matches the email template with an action eg. “forgot”.

- **Subject** – Add the subject of the email that will be sent to the customer.

- **Content** – Add the content of the email (body) that will be sent to the customer. This can be any custom email template design that fimble team can implement for you or just use an email template already designed for another purpose but matches the scope you need it for. The content you add in the content text area can be a simple text or even a more robust marketing email template.

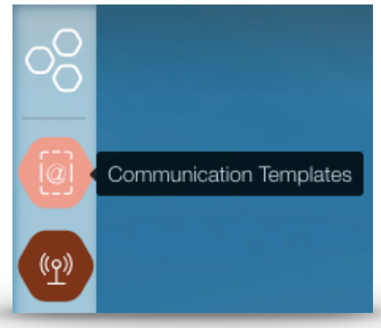
Note: Make sure you do not delete identifiers and tags of the pre-made email templates because these are used by system and they are what match the email templates with a specific action eg. the “Forgot Password” feature of your restaurant’s website and mobile application. If you want to create a new email template then we will use the identifier and tag you placed in order to match them with the respective action you would like the system to perform.

5. After adding a new email template, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

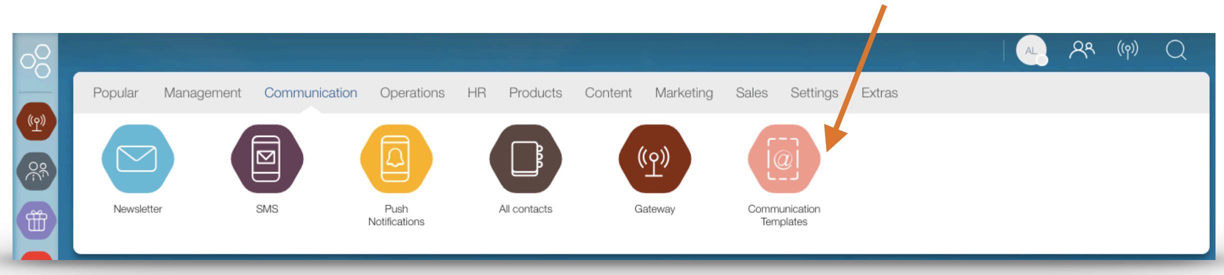
SMS Templates Management

The user can set up here the content / message (template) of the sms that are automatically sent from the system on specific cases. These cases are hard coded.

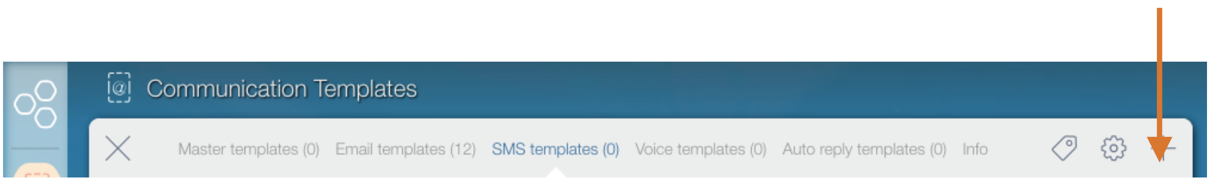
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Communication Templates app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



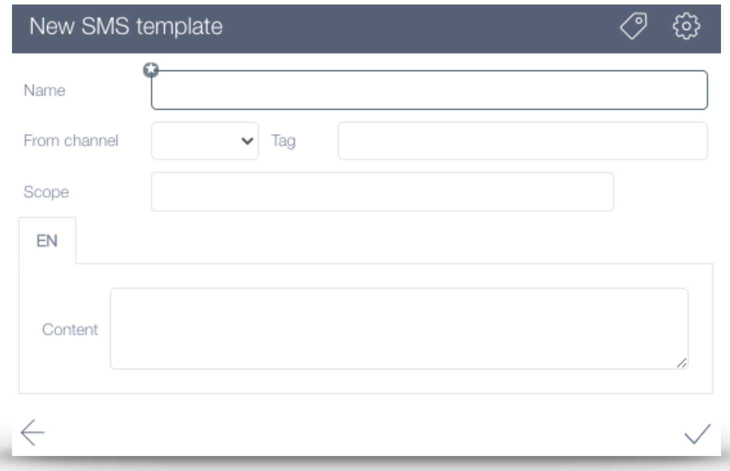
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Communication Templates app** inside.



3. Launch the **Communication Templates app,** select the **SMS Templates tab** and press the "+" icon to add a new sms template. It will open a new form where you are able to fill in the required fields for the new sms template in order to be handled by Fimble system when you want to send bulk sms to your customers like a new offer added on the website or an automated sms when they have birthday wishing them Happy birthday with a discount coupon attached.



4. You should fill in the following sections to create a new SMS template:



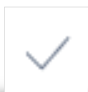
- **Name** – Add the SMS template name. This is used for identification, search reporting, etc.

- **From Channel** – Select the SMS type from the From Channel dropdown list. In order to see and select the sms option in the dropdown, you will need to create a new sms channel through the Gateway application. In the Gateway application you need to create a new SMS channel type named sms or SMS if it does not already exist in order to be used as the option in the field From Channel in SMS templates new form when you are going to add a new sms template.
See how to manage communication channels

- **Scope** – Select the applications you would like to tag the sms template. For example there is a feature to send sms through the POS application, so you will need to select the POS option in the Scope field in order to match them and make it work correctly.

- **Content** – Add the text of the sms (body) that will be sent to the customer.

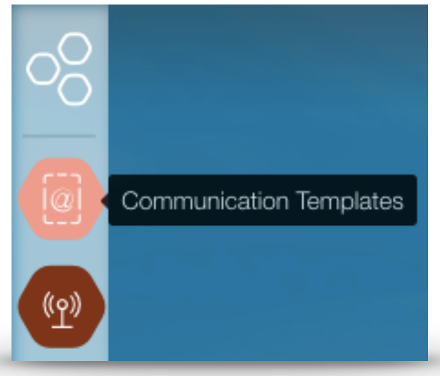
5. After adding a new sms template, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.



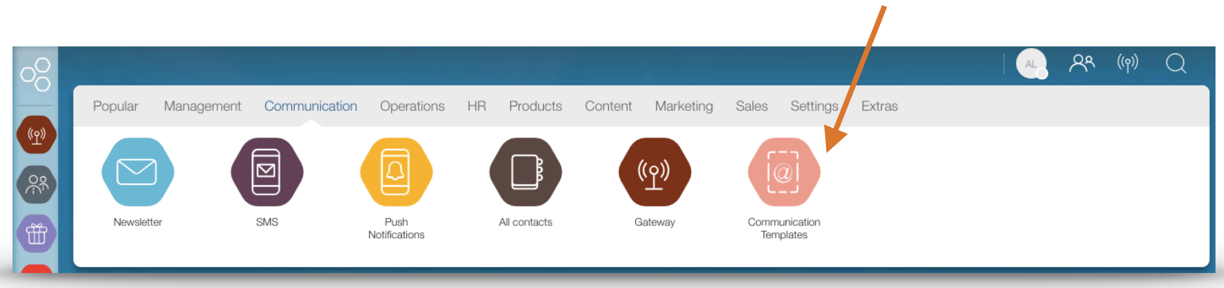
Push Notification Templates Management

The user can set up here the content / message (template) of the push notifications that are automatically sent from the system on specific cases. These cases are hard coded, each one of them using a specific identifier which is the "tag" field which should not be changed on editing. For example, a push notification for the order's delivery is an automated push notification that could be sent to the customer once the order is set as delivered.

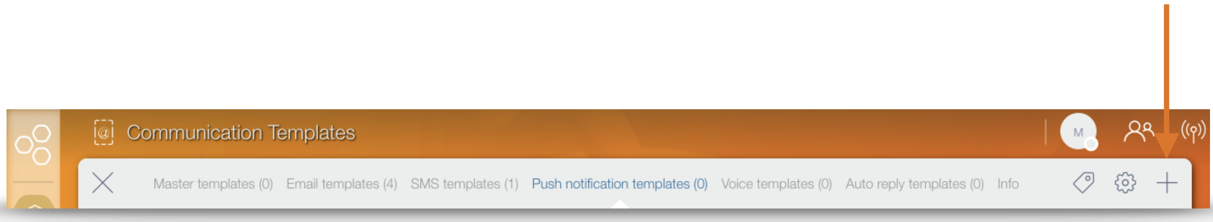
1. Go to the Application bar on the left sidebar menu, and choose either to launch the **Communication Templates app** by clicking on the app icon if it is already docked (avoid step 2 in this case) or to launch the dashboard by clicking on the top icon on the left sidebar menu.



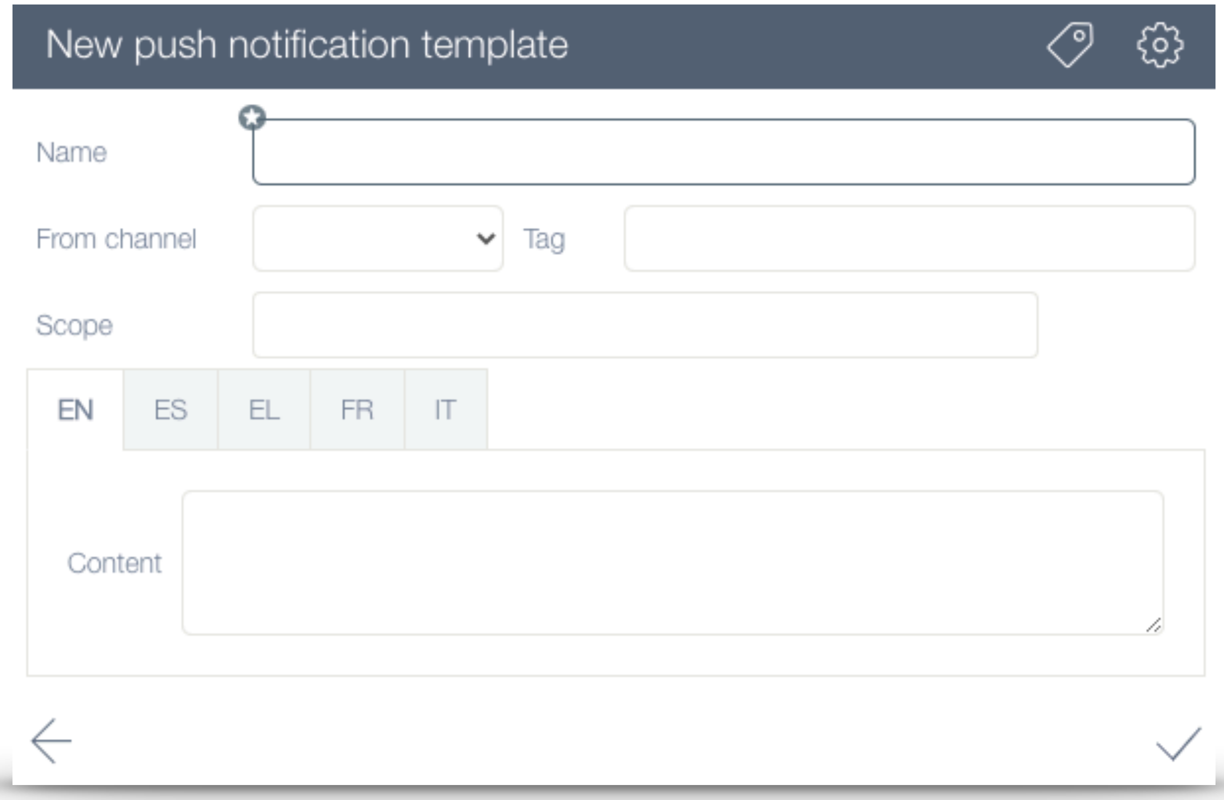
2. Once you open the dashboard, you have the respective user level access to applications broken down by most popular and by major categories. Then you are able to select the **Communication Category** where you will find the **Communication Templates app** inside.



3. Launch the **Communication Templates app,** select the **Push Notification Templates tab** and press the "+" icon to add a new push notification template. It will open a new form where you are able to fill in the required fields for the new push notification template in order to be handled by Fimble system when you want to send push notifications to your customers through fimble mobile application like a new offer added or a coupon expiration reminder as well as a push notification to the client when the order is leaving the store and it is out for delivery.



4. You should fill in the following sections to create a new push notification template:



- **Name** – Add the push notification's template name. This is used for identification, search reporting, etc.

- **From Channel** – Select the channel from which the notification will be sent.

- **Tag** – As mentioned above this is the identifier used by the system.

- **Scope** – The application from which the record will be updated and then the push notification will be sent.

- **Content** – Add the content / message (text) of the notification.

Note: Make sure you do not delete the tags of the pre-made push notifications templates because these are used by system and they are what match the push notifications templates with a specific action eg. the “You received a new coupon for your birthday” feature on your mobile application. If you want to create a push notification template then we will use the tag you placed in order to match it with the respective action you would like the system to perform.

5. After adding a new push notification template, to SAVE the record click the CHECK mark on the bottom right corner. In order to close the form without saving, click the Arrow on the bottom left corner.

Any Questions?

For more information contact us:

support@fimble.io