Integrate Toast with Crunchtime

Setup Guide

Document Details

Document #: 160_TOSG_260710

Overview

The purpose of this document is to provide the information you need to integrate the Toast POS system with the Crunchtime platform.

Download the latest version of this document here:
https://links.crunchtime.com/SG-IntegrateToastWithCT

… or scan the QR code to the left.

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SETUP GUIDE

Integrate Toast with Crunchtime

Introduction

Toast POS is a Cloud based platform that integrates data with Crunchtime on all five fronts. This integration can enable you to pull sales and time punch information from your POS into Crunchtime, as well as push Schedule and Employees from Crunchtime down to your POS system.

POS → Crunchtime:	Crunchtime → POS:
1. Sales Mix	1. Employees
2. Menu Mix	2. Schedules
3. Time Clock	

As a Cloud based platform, the first step is to allow our POS Integration Team (Connex) access to the Toast API. Reference the following link to add Crunchtime to the Toast Partner Connect Program for each Location: https://central.toasttab.com/s/article/Toast-Partner-Connect-Setting-Up-Integrations-with-Toast

After being added to the Partner Connect Program, Connex will also need to know the Toast GUIDs for all Restaurants set up in Toast. A GUID is a unique code established in the POS and should look something like this:

Restaurant Name	Toast GUID
Main Street Burger	facd7597-57e1-4e37-ba2a-01aa131b5691
South Street Burger	01e8795f-130e-41e1-8b09-213eaa80ab00

Note: Crunchtime requires many fields that are not required in Toast for the various integration points. For seamless integration between the two platforms, clients should ensure that all necessary fields are completed for all new menu items and employees.

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Location Activation

To enable a location with Connex, an activation request must be sent to the Crunchtime Support team (support@crunchtime.com) containing the following information:

- *Location Code* – The location code exactly as it appears in Enterprise Manager.
- *Location Name* – The name of the location (we recommend using the same name as it appears in Enterprise Manager).
- *Go-Live Date* – The date Connex will begin pulling data into Net-Chef.
- *Location Time Zone* – The time zone the location is in.
- *Job/File Types* – The type of integration that this location will be using (Sales Mix, Menu Mix, Time Clock, Employees, Schedules).
- *Observes Daylight Savings Time* (DST) – Choose either Yes or No.
- *Net-Chef URL* – The Net-Chef URL for this particular location.
- *Toast Location GUID* – The unique code POS for this location.

Example Request:

- *Location Code*: 123ABC
- *Location Name*: ABC Store
- *Go-Live Date*: 06/13/2024
- *Location Time Zone*: EST
- *Jobs/File Types*: Sales Mix, Menu Mix, Time Clock
- *Observes Daylight Savings Time*: Y
- *Net-Chef URL*: https://crunchcafe.net-chef.com
- *Toast Location GUID*: 13c1dba3-f30e-31b5-d753-8a3e952jb007

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Requirements for Menu Mix Integration

SKU or PLU: Crunchtime recognizes Menu Items in the POS by referencing a PLU code that must be 12 digits or less. Toast does not require the configuration of this code, but it is required to integrate with Crunchtime. If PLU/SKUs are missing, this will cause the Menu Mix integration to fail, inhibiting a customer's ability to report on theoretical costs.

Toast supports two fields: PLU or SKU. Each client **must pick one of these two fields** and inform the Crunchtime Connex Team of their choice so the integration can reference the proper field.

PLUs & SKUs can only be imported when a Menu Item or Modifier is originally created. For any Item that already exists or is created manually, a PLU/SKU must be entered manually.

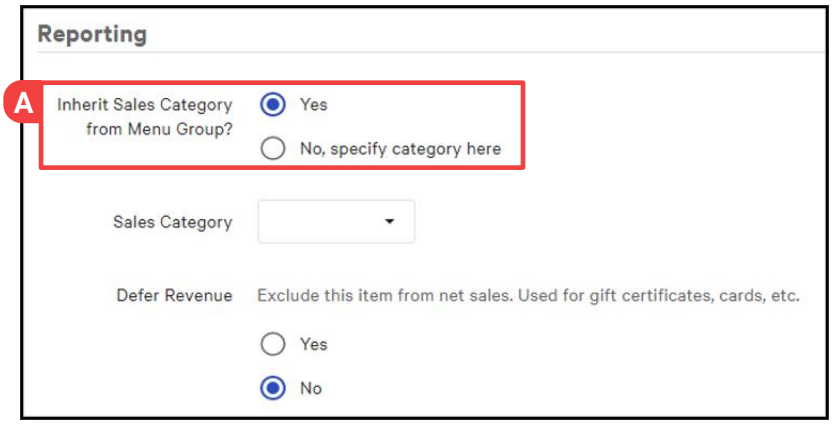
Requirements for Sales Mix Integration

Depending on how your chart of accounts is configured, you may choose to report on sales totals in Crunchtime by using the Toast Revenue Center, Dining Option or Sales Category. The most popular choice is grouping by Sales Category.

When integrating with Crunchtime, all Items and Modifiers in Toast are required to be directly linked to a Sales Category.

Sales Category: Crunchtime maps the Toast Sales Category to a specific GL to report on Net Sales by GL. Each item in Toast must be linked to a Sales Category for our Sales Mix integration to function without failure.

When setting up Toast Modifiers, there is a parameter that allows you to "Inherit Sales Category from Menu Group". This setting allows for a faster Toast setup.



A When set to "Yes", the sales value for this modifier will be coded to the Parent Menu Sales Category and its corresponding GL Account.

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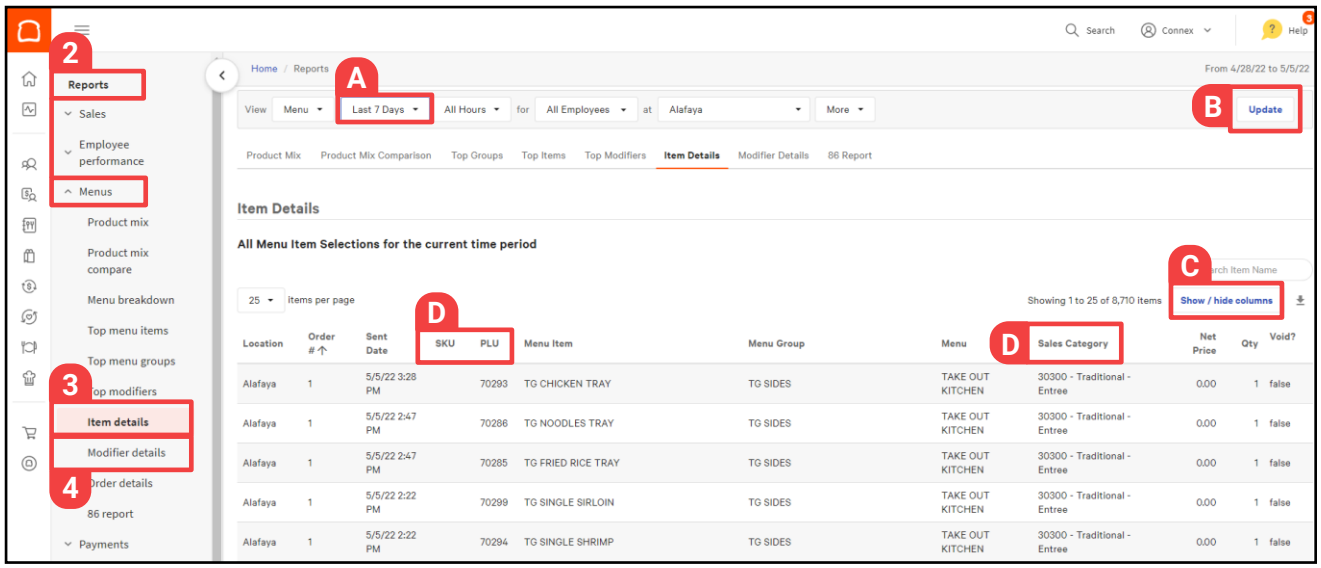
Requirements for Sales Mix Integration (Continued)

To validate that Sales Category & PLU/SKU setup has been completed, follow these steps in Toast.



1. Log in & select a Toast Location.
2. Navigate to *Reports* > *Menus*.
3. Select the *Item details* report.
   - A. Change the Date Range = *Last 7 Days*.
   - B. Click *Update*.
   - C. Click *Show/Hide Columns*.
   - D. Add 'SKU/PLU' & 'Sales Category'.
   - E. Run the export.
   - F. Filter for null SKU/PLU & Sales Category Values.
   - G. Update setup in the Toast UI to include any missing parameters.
4. Select the *Modifier details* report and repeat Steps A - F above.

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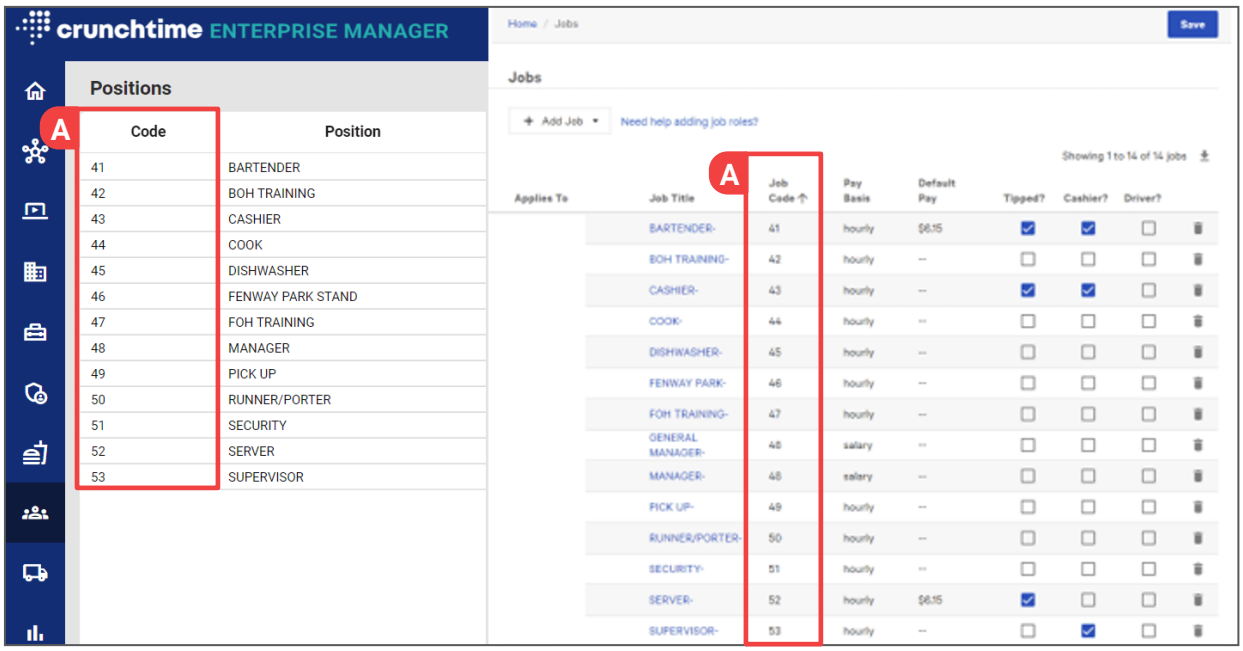
Requirements for Labor Integration

Job Codes: These are needed for both Employee and Time Clock integrations. In Crunchtime, they are referred to as Position and Position Code. The list of Position Codes and Job Codes must be aligned in both systems. The Position Name and Job Title do not matter – only the Codes needs to match.



A The Position Codes in Crunchtime must match the Job Codes in Toast.

Tip: If necessary, two Job Titles in Toast can match to one Job Code.

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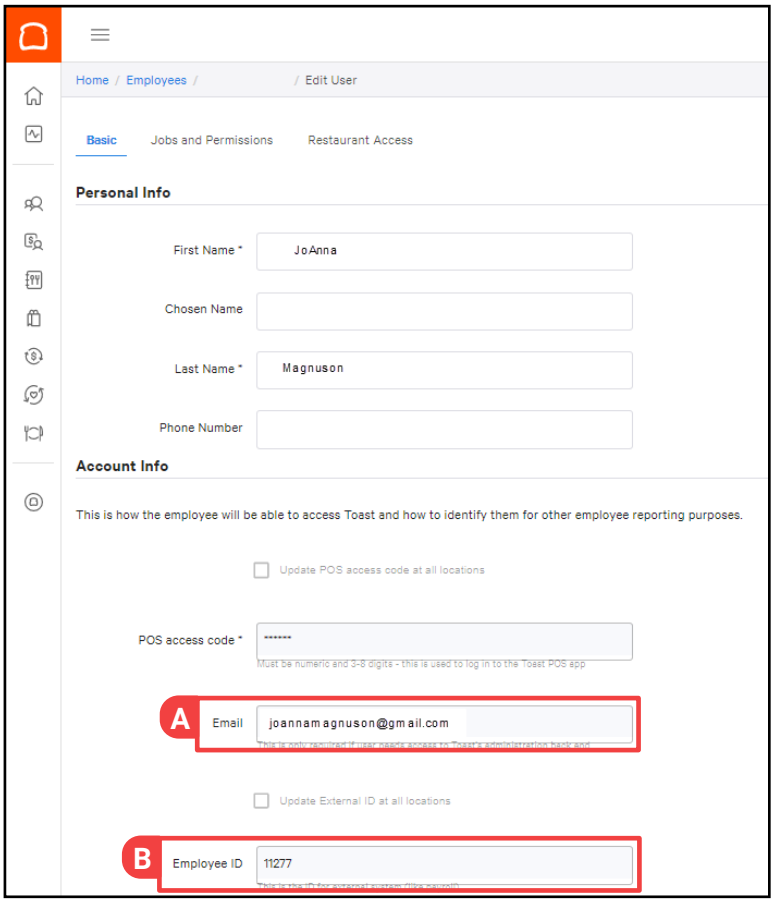
Email: This is required for Employee Integration. In order for systems to update existing records, there must be a unique identifier that you key off of so you know what record to update. For Toast, the unique identifier for an employee is the Email field. The Email Address field in Crunchtime must match the Email field in the Toast Employee Account Info screen in order for Crunchtime to update an existing employee record with a new Job Code or updated Pay Rate.

A *Email* – The Email Address field in Crunchtime must match this entry.



Employee ID: This is required for both Time Clock and Employee integrations. In Crunchtime, this field is referred to as the POS ID. The Toast Employee ID is the code passed to external systems like payroll or Crunchtime. The Toast Employee ID is not required in Toast but is used by the Time Clock data we capture so that managers can review and approve labor for Payroll in Crunchtime. It is required that the Toast Employee ID and Crunchtime POS ID match. If this field is missing in Toast, the Toast API passes a GUID string for the employee, which will cause the integration file to fail.

B *mployee ID* – For the Crunchtime integration, this field must be populated in Toast and the POS ID field in Crunchtime must match this entry.

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Other Considerations

- Q: Have you configured Open Items?
  A: Toast does not allow you to configure a PLU/SKU for these Items so you will need to manage a custom list with Connex.
- Q: Do you have Service Charges configured?
  A: We do not capture this data in our standard integration, so customers need to inform Connex that Service Charges are used.
- Q: Do managers need to review Charge Sales, Charge Tips, Cash Sales and Cash Tips when reviewing Labor?
  A: We do not capture this data in our standard integration, so customers need to inform Connex if this data is needed.
- Q: Do you allow free form Paid In/Outs?
  A: *This does not support seamless integration so Crunchtime advises against it.*

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