



Get to know your dashboard in about 15 minutes.

Everything you need to run online ordering, your menu, your staff, and your tips — written in plain English for restaurant owners and managers, not engineers.

START HERE

The five-minute version

If you only do five things, do these. Each one links to the full detail below.

1

Check your dashboard

See today's orders, sales, and tips at a glance.

2

Build your menu

Add items and categories, and set what's visible to customers.

3

Set your hours & payments

Pickup hours, payment options, and your ordering link.

4

Set up tip pooling

Decide how tips are shared across your team.

5

Review shifts & payroll

Confirm hours and tips before payday.

SECTION 1

Your dashboard at a glance

This is the first screen you see after logging in. It gives you a quick read on how the restaurant is doing right now.

WHAT YOU SEE	WHAT IT TELLS YOU
Order Statistics	Total Orders, Total Sales, Total Tips, and Average Ticket — switch between Today, Week, Month, and Year.
Pause online ordering	A button in the top-right of every screen. Use it any time you need to stop taking online orders — for a rush, a closure, or the end of the night.

SECTION 2

Orders

A running list of online orders for whatever date range you choose.

SETTING	WHAT IT DOES
Date range	Pick a start and end date, then hit Go to filter the list.
Order details	Each row shows the customer's name, email, phone, payment method, pickup time, tip, and total.

Your menu (Inventory)

Inventory is where your menu lives — items, the categories they're grouped into, and the menus they belong to.

Items

SETTING	WHAT IT DOES
Add New Products	Add a new menu item, set its price, category, and modifier groups.
Visible	Toggle whether an item shows up on your live online ordering menu, without deleting it.

Categories

SETTING	WHAT IT DOES
Add Category	Group items together — like Sandwiches or Lunch Specials — for a cleaner menu.
Visible	Show or hide an entire category from the online menu at once.

Menu Type

Menu Types let you group categories under time-based menus — for example a breakfast menu that switches to lunch at 11am — each with its own working hours.

Customers

A read-only list of everyone who has ordered online, built automatically as orders come in.

COLUMN	WHAT IT SHOWS
Contact info	Name, email, and phone number.
Marketing Allowed	Whether the customer opted in to marketing messages.
Order history	Customer Since, Last Order Date, Last Order amount, Lifetime Total, and total number of Orders.

Employees & roles

Employees sync in from Clover. Roles are where you control tip rules and access for each position.

Adding or removing staff

Employees can't be added or removed from this dashboard — that's done from your Clover dashboard or device. Once an employee exists in Clover, they'll appear here automatically.

What you can manage here

SETTING	WHAT IT DOES
Include in Payroll Report	Toggle whether an employee's hours and tips show up on the Payroll Report.
Show Active Employees	Filter the list down to staff currently active in Clover.

Roles

SETTING	WHAT IT DOES
Assigned To	Which employees hold this role — for example Server or Kitchen.
Tip Pooling	Turn on if this role shares tips with others rather than keeping their own.
Min. Hourly Tip Rate	A guaranteed minimum tip rate per hour for this role, if you offer one.
Accept Tip	Whether this role is eligible to receive tips at all — off for most back-of-house kitchen roles.

Shifts & payroll

Shifts logs every clock-in and clock-out. Payroll Report rolls that up into hours and tips per employee, ready for payday.

Shifts

SETTING	WHAT IT DOES
Today / Week / Month / Year / Custom	Pick a date range, and optionally filter to one employee.
Export	Download the shift data shown on screen.
Tip Shortage	Flags when an employee's declared tips fell short of what's required for their role.

Payroll Report

Same date-range and employee filters as Shifts, rolled up into Total Hours, Tips & Service Total, Declared Cash Tips, Total Tip Out, Total Tip In, Tip Pool, Total Tips, Tip Shortage, and Hourly Tip Rate — everything you need to run payroll for a pay period.

Tip Manager

Four reports that break down exactly how tips moved through your restaurant for a given date range.

REPORT	WHAT IT SHOWS
Tip Out	Gross sales, tips and service total, and tip-out fees per employee, per day.
Tip In	What each employee is eligible to receive, summarized by rule or by date.
Tip Pool	Every pooled order's contribution and share amounts, by eligible employee.
Withholding Report	Sales and tip withholding side by side with net tips and the final tip amount paid out.

Tip rules live in Roles

Before these reports will show meaningful numbers, make sure tip pooling, minimum hourly tip rate, and Accept Tip are set correctly for each role — see [Employees & roles](#) above.

Restaurant settings

Everything about how your restaurant appears and operates on online ordering, organized into six tabs.

TAB	WHAT IT CONTROLS
General	Profile picture, address, phone number, time zone, and preparation time.
Visibility	Hide the special instructions box on checkout or menu items, and hide the tip box on credit card orders.
Payments	Choose Pay Online, Pay at Pickup, or Both, and set up an optional service charge — flat name, auto-applied or not, and a percentage.
Hours	A global "Business is closed" switch, plus pickup hours for each day of the week.
Ordering Link	Your public online-ordering web address, plus an optional announcement banner customers see when ordering.
Shift Settings	Auto clockout time — protects against an employee forgetting to clock out.

New restaurant checklist

Working through these in order gets a new restaurant ready to take online orders.

- 1 Fill in **General** settings — address, phone, time zone, and preparation time.
- 2 Set your **Hours** for each day, and confirm the business isn't marked closed.
- 3 Choose your **Payment options** and set up a service charge if you use one.
- 4 Build out your menu in **Inventory** — items, categories, and menu types — and confirm everything you want live is marked Visible.
- 5 Create your **Roles** and set tip pooling, minimum tip rate, and Accept Tip for each one.
- 6 Turn on **Include in Payroll Report** for every employee who should appear on payroll.
- 7 Set your **Auto clockout time** under Shift Settings.
- 8 Grab your **Ordering Link** and add it to your website, social profiles, and any print materials.

Troubleshooting

The issues we get asked about most, and what to check first.

PROBLEM	WHAT TO DO
A menu item isn't showing online	Check that both the item and its category are toggled Visible in Inventory.
An employee isn't on the Payroll Report	Confirm Include in Payroll Report is turned on for them under Employees.
Tip numbers look off	Double check Tip Pooling, Min. Hourly Tip Rate, and Accept Tip on that employee's Role.
Customers can't check out	Confirm "Business is closed" isn't switched on under Hours, and that today's pickup hours aren't set to Closed.
An employee didn't clock out	Check Auto clockout time under Shift Settings — it should be set to a time after your last realistic shift ends.
A new employee isn't appearing	Add or activate them in Clover first — Employees syncs from Clover and can't add staff directly.

Still stuck? Reach us on live chat inside the app, email support@kitchenbot.io, or call [704-287-4009](tel:704-287-4009).