OTTER TABLET TRAINING |

Otter is a tablet consolidating software for online order & delivery platforms that allows more than one online order & delivery service to reside on one tablet. This document will walk you through *Tablet Basics, Enabling Sound, How to Manage Orders, Menu Management, Order Adjustments, Manually Turning off Your Store, Support, and Other Delivery Partner Tablets.*

TABLET BASICS |

1. **PLACE** the tablet in a visible area where it can be seen and heard.
2. Orders will pop up on the screen as well as make a sound. Note that the Otter page refreshes on its own so the orders will pop up right away.
3. **KEEP** the tablet always plugged into a power source.
4. If there is an issue, **CLICK** on the orange chat button and a member of the Otter Support Team will respond.

ENABLING SOUND |

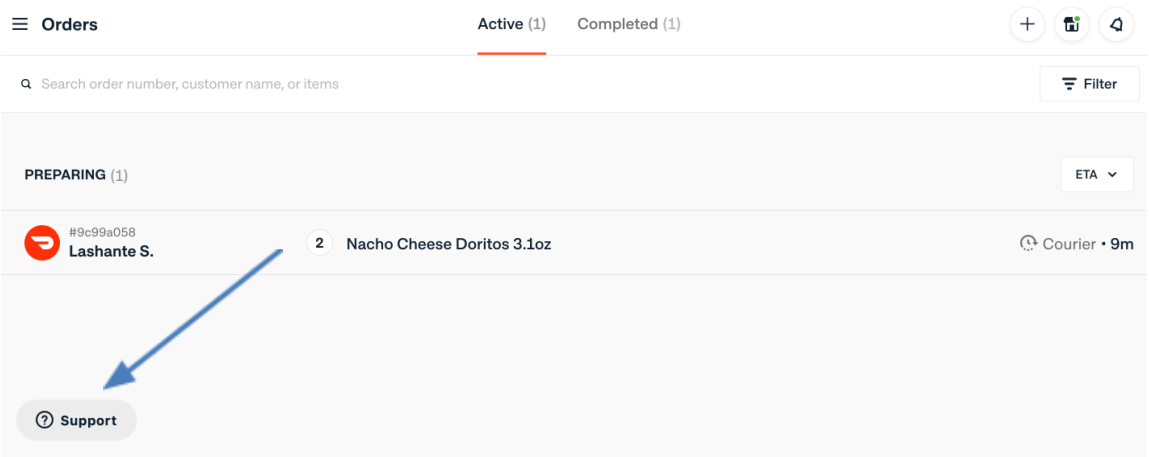
1. **ADJUST** the volume by swiping down from the top of the screen to access basic settings or
2. **CLICK** the home button on the bottom of the tablet to access tablet settings and adjust the volume.

OTTER SUPPORT |

1. To contact **Otter support** at any time, use the chat feature at the bottom left side of the screen by **CLICKING** the "support" bubble.

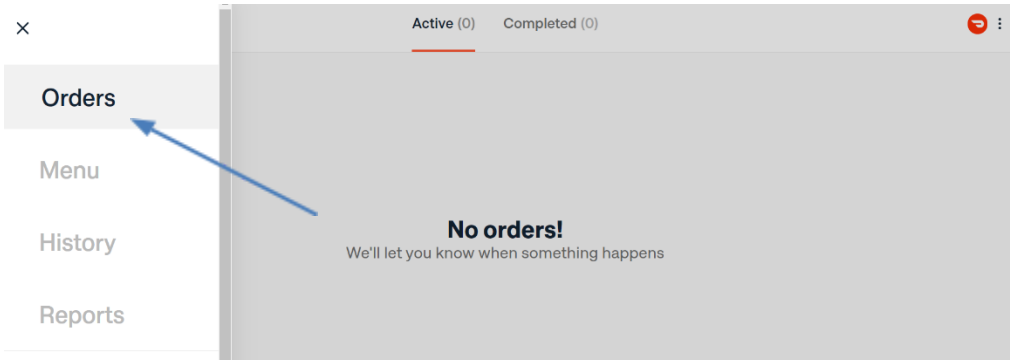
Contact support if

- A courier never arrives for an order
- The store needs to close early and hours need adjusting

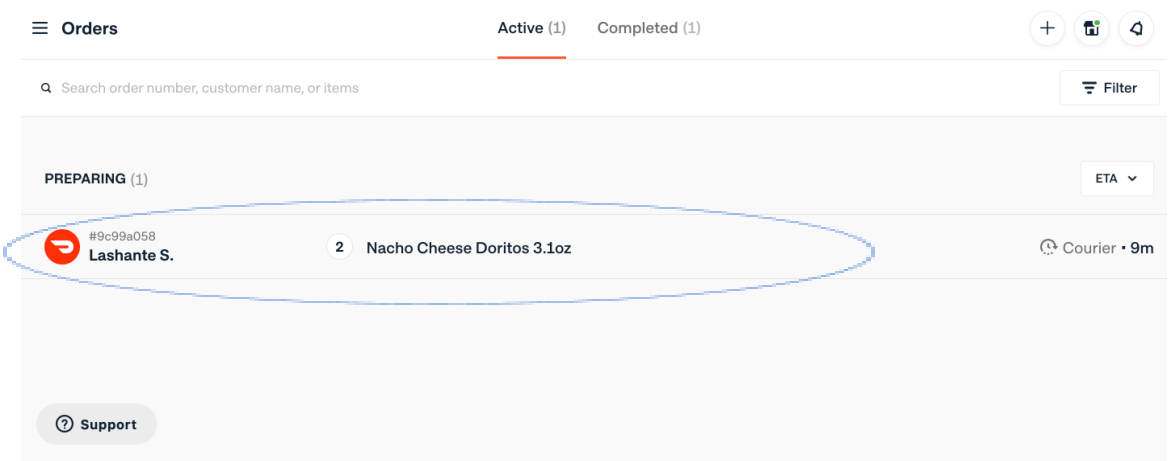


MANAGING THE ORDER SCREEN |

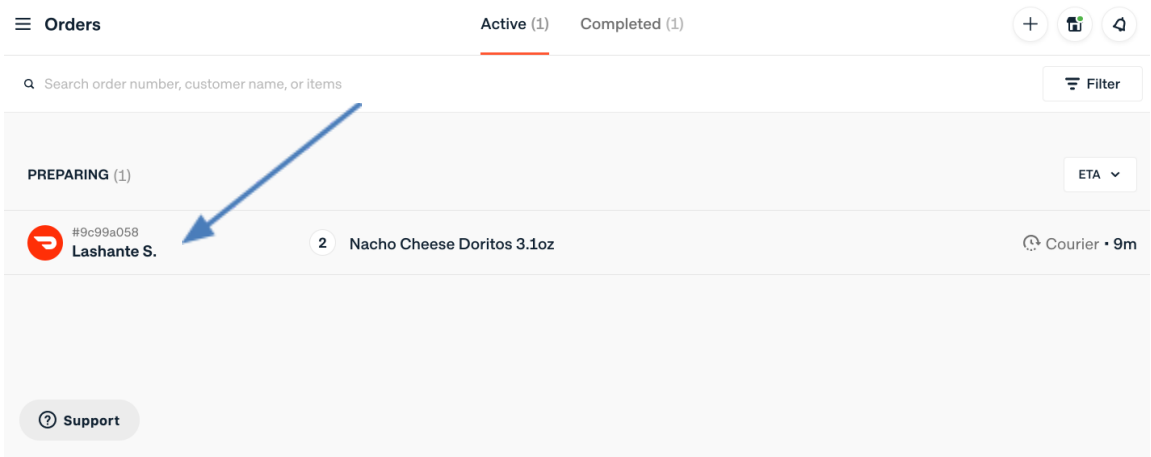
1. **CLICK** "Orders" from the menu



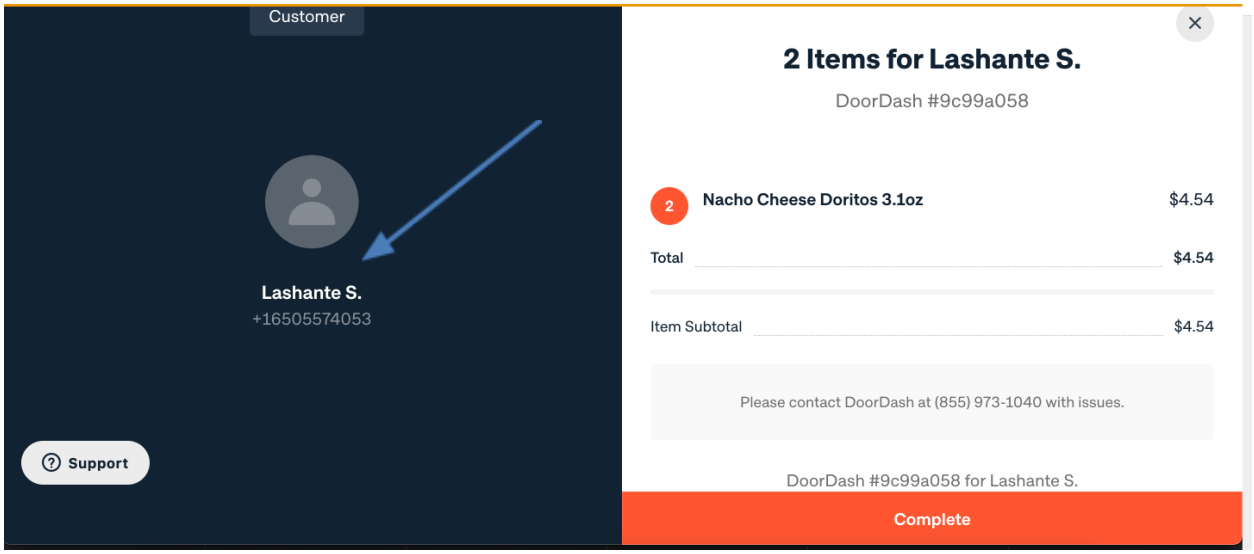
2. On the order screen, you will see active orders.



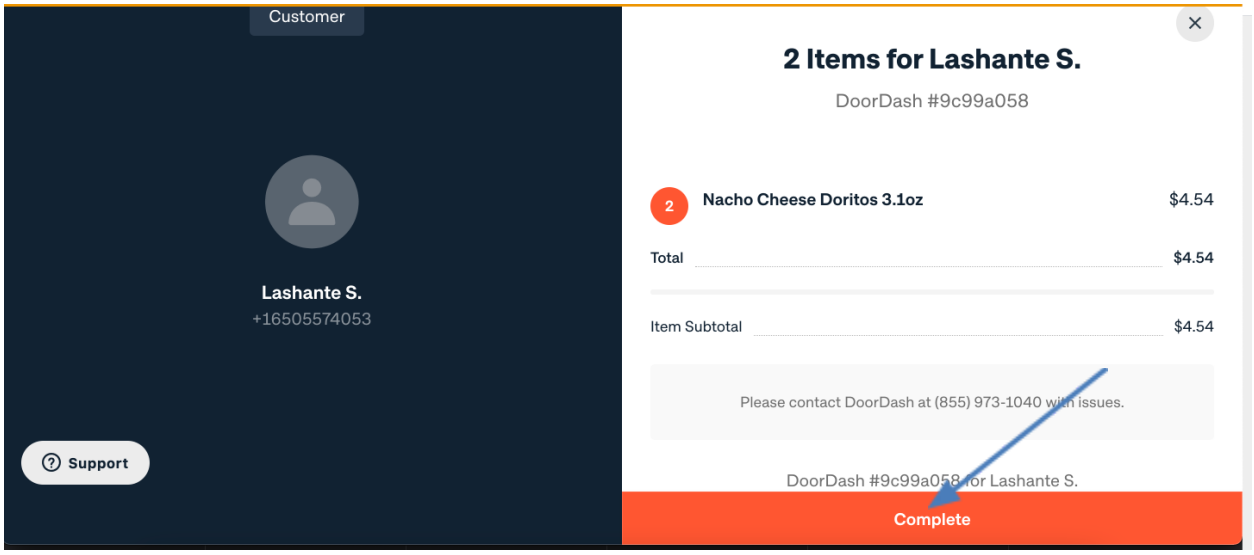
3. For any action needed on an order (cancel/contact customer/contact driver) **CLICK** on the order.



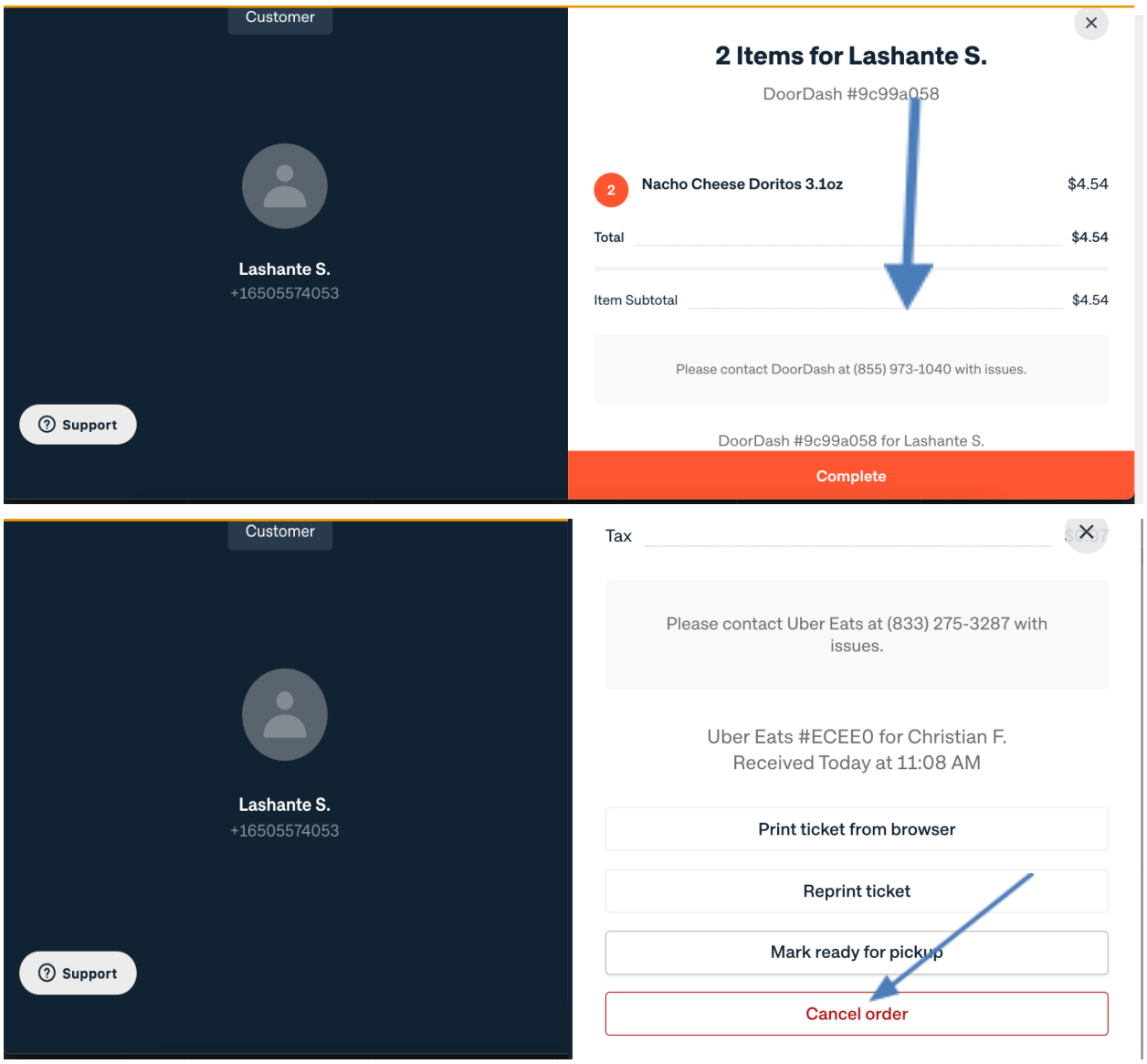
4. Once you have clicked on an active order you will see the customer information and order information (this phone number can be used to call a customer to see if they would want to swap an out-of-stock item with a like product in stock).



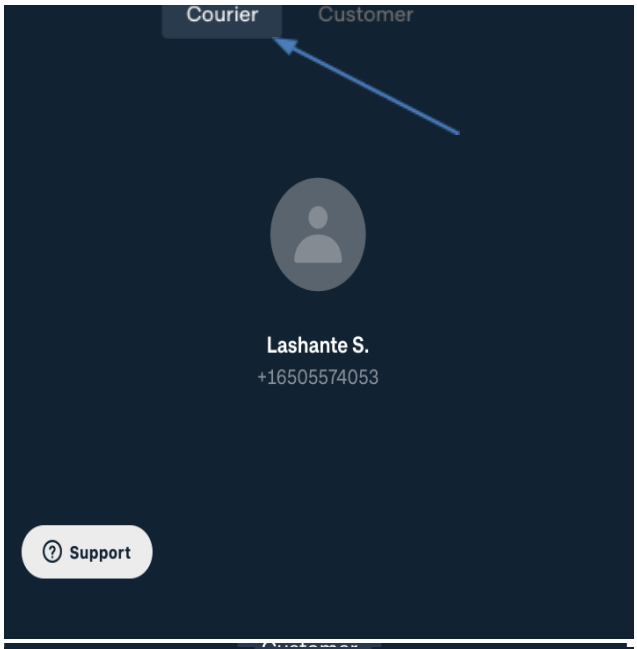
5. If you would like to complete the order, **CLICK** "complete" at the bottom right part of the screen. (If you want to cancel the order **please see the next step**)

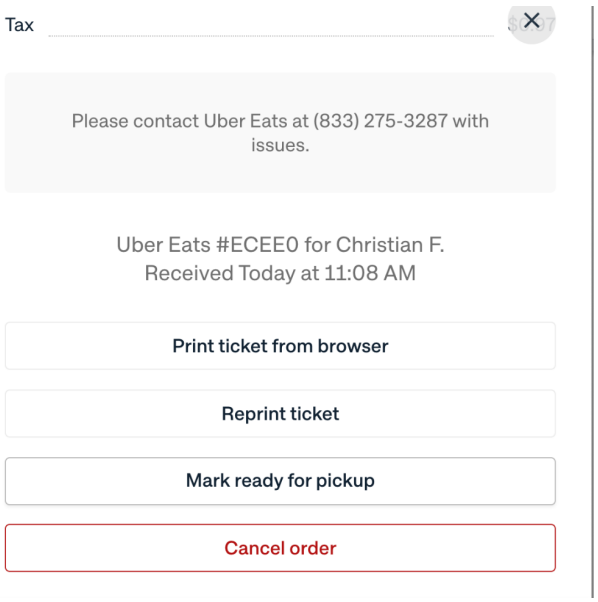


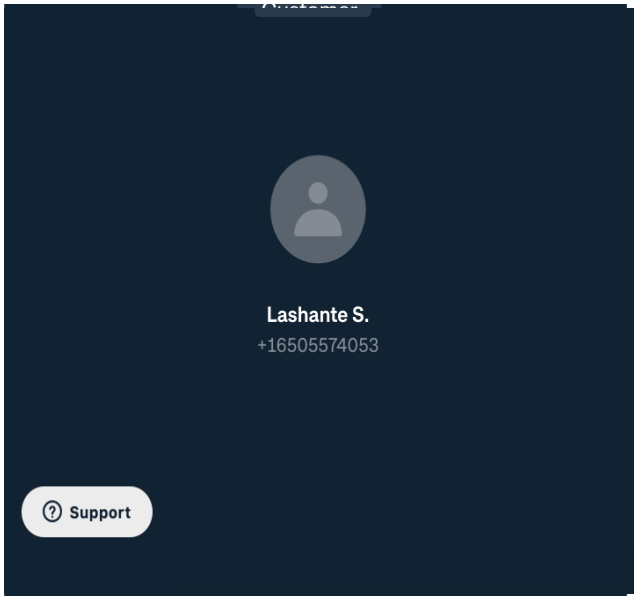
6. If you would like to cancel an order because you're unable to swap the item or contact the customer, scroll down on the active order screen and **CLICK** "cancel order".

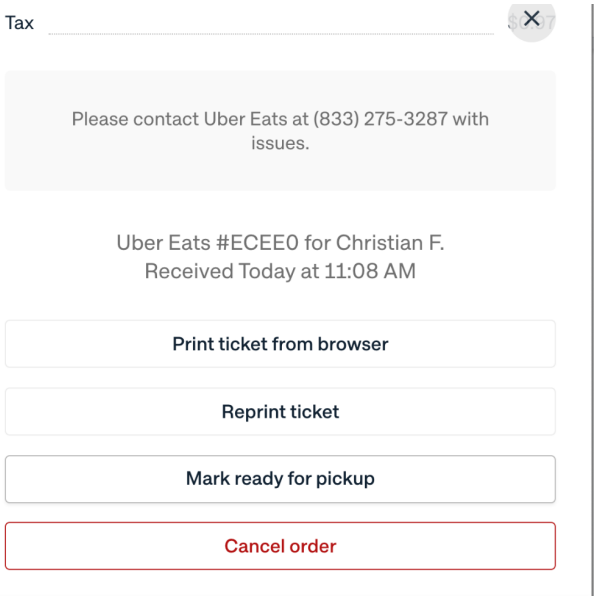


7. If you would like to contact the courier, you would click on "Courier" next to "Customer" at the top left part of the screen to see the courier's contact information. **NOTE: If you don't see the Courier button next to the Customer button, this means a courier has not yet been assigned to the order.**

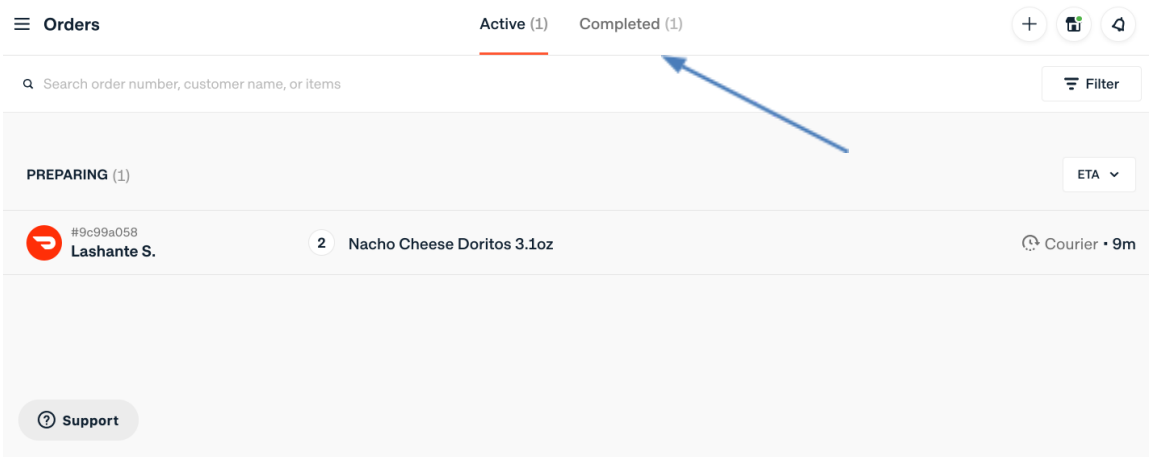

Courier
Customer
Lashante S.
+16505574053
Support


Tax
Please contact Uber Eats at (833) 275-3287 with issues.
Uber Eats #ECEE0 for Christian F.
Received Today at 11:08 AM
Print ticket from browser
Reprint ticket
Mark ready for pickup
Cancel order


Lashante S.
+16505574053
Support


Tax
Please contact Uber Eats at (833) 275-3287 with issues.
Uber Eats #ECEE0 for Christian F.
Received Today at 11:08 AM
Print ticket from browser
Reprint ticket
Mark ready for pickup
Cancel order

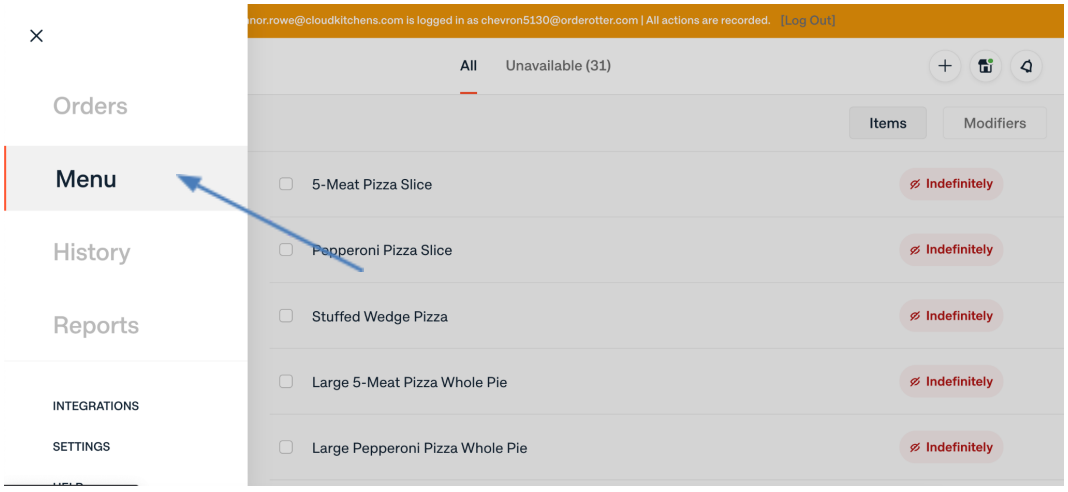
NOTE: Once an order is complete it can always be referenced in the *Completed* tab.



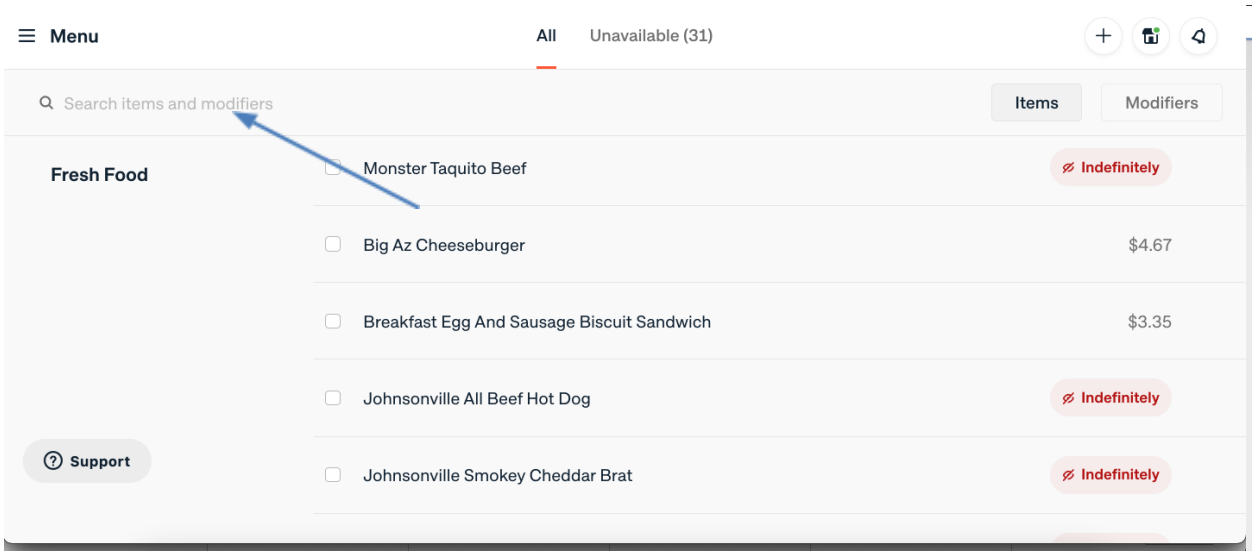
MENU MANAGEMENT |

Orders received in the tablet cannot be adjusted, so managing the menu is a critical step that must be conducted during every shift. Follow the instructions below to mark an item in or out of stock.

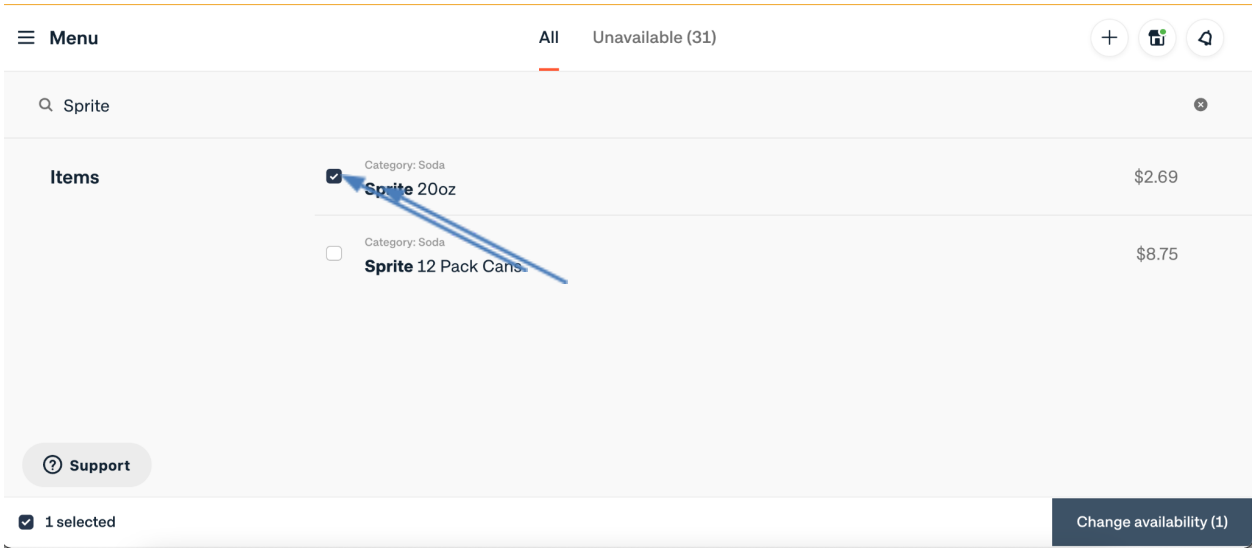
1. **CLICK** the Menu tab.



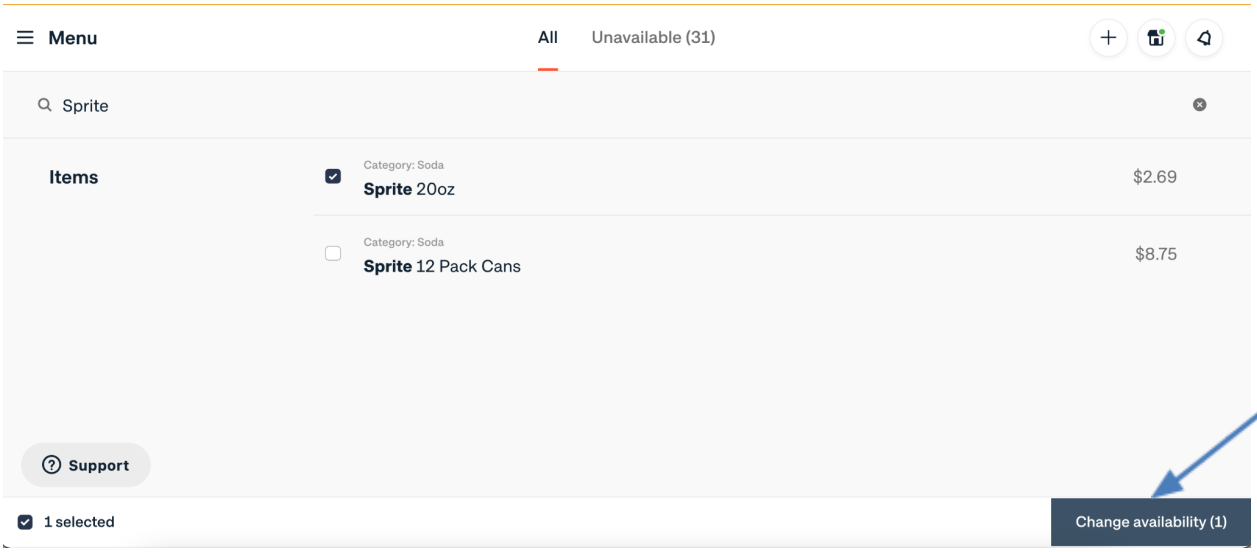
2. Find the item you would like to mark out of stock by using the search bar.



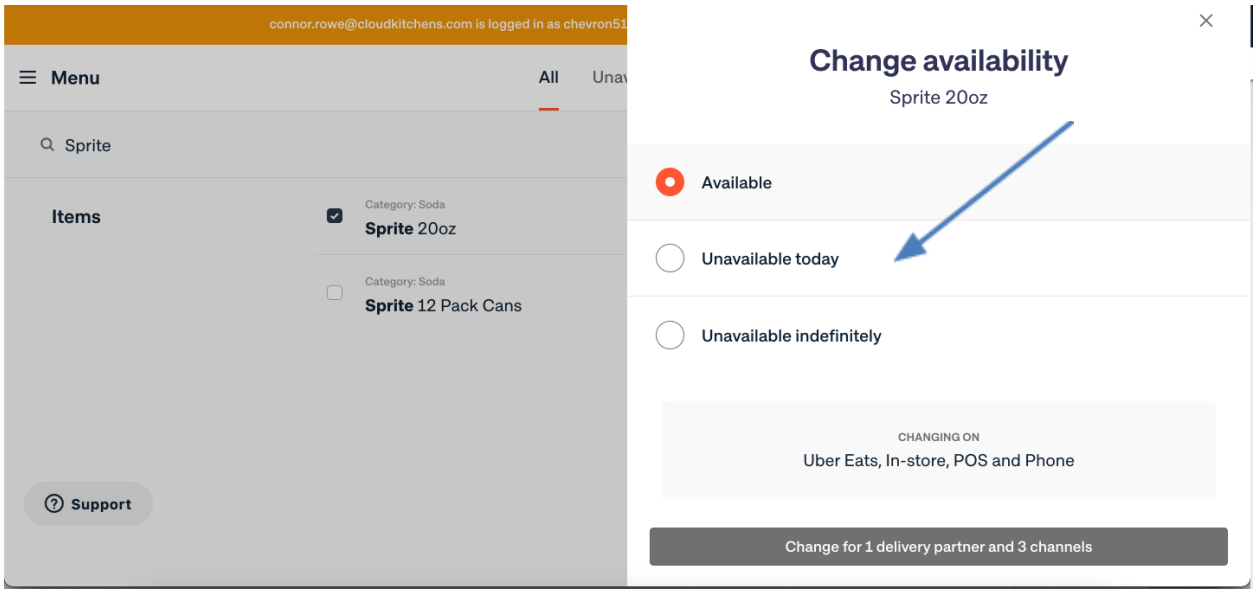
3. Once you find the item you would like to mark out of stock, **SELECT** the checkmark box next to it.



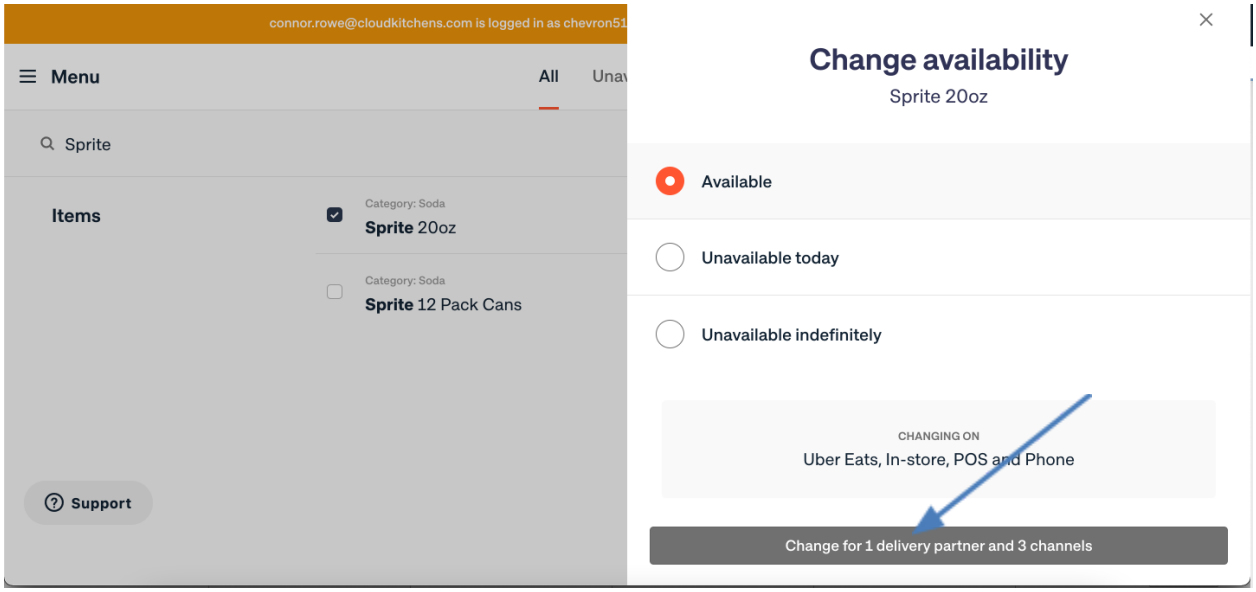
4. Next on the same page, **SELECT** "change availability"



5. When the pop-up appears on the right part of the screen, **SELECT** either *'Available*,' '*Unavailable today*,' or '*Unavailable indefinitely*.'
NOTE: '*Unavailable today'* items will automatically be made active the next day. '*Unavailable indefinitely'* items must be manually reactivated.



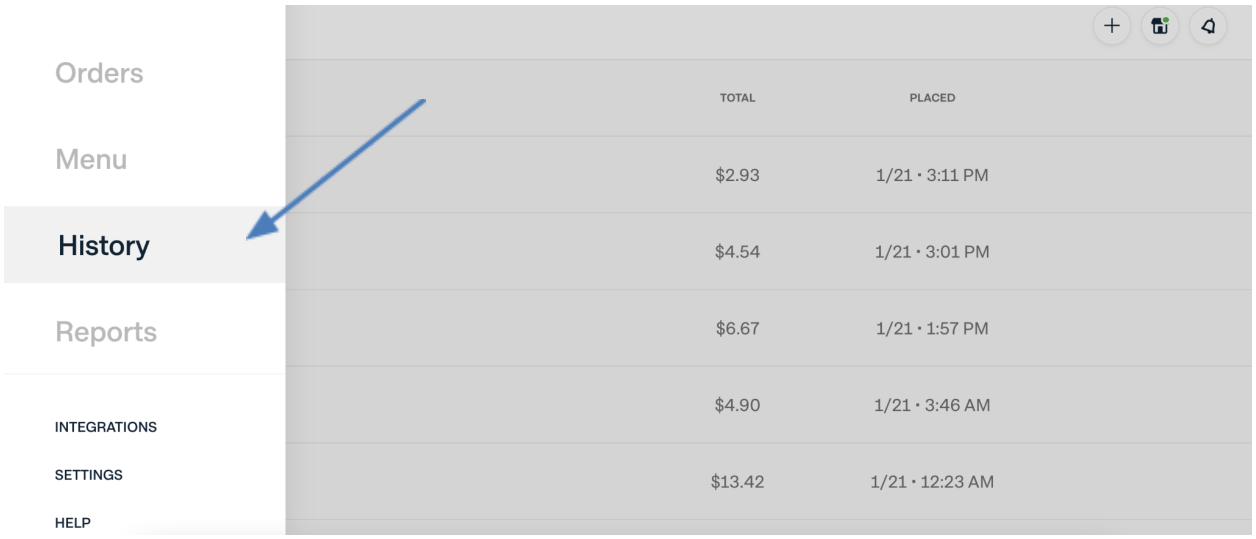
6. **CLICK** the bottom button "Change for……" to deactivate the item for all delivery partners.
   NOTE: For beer stores that have 2 menus ("All Day" and "With Alcohol"), changing the menu in Otter will update BOTH menus with just a single click!



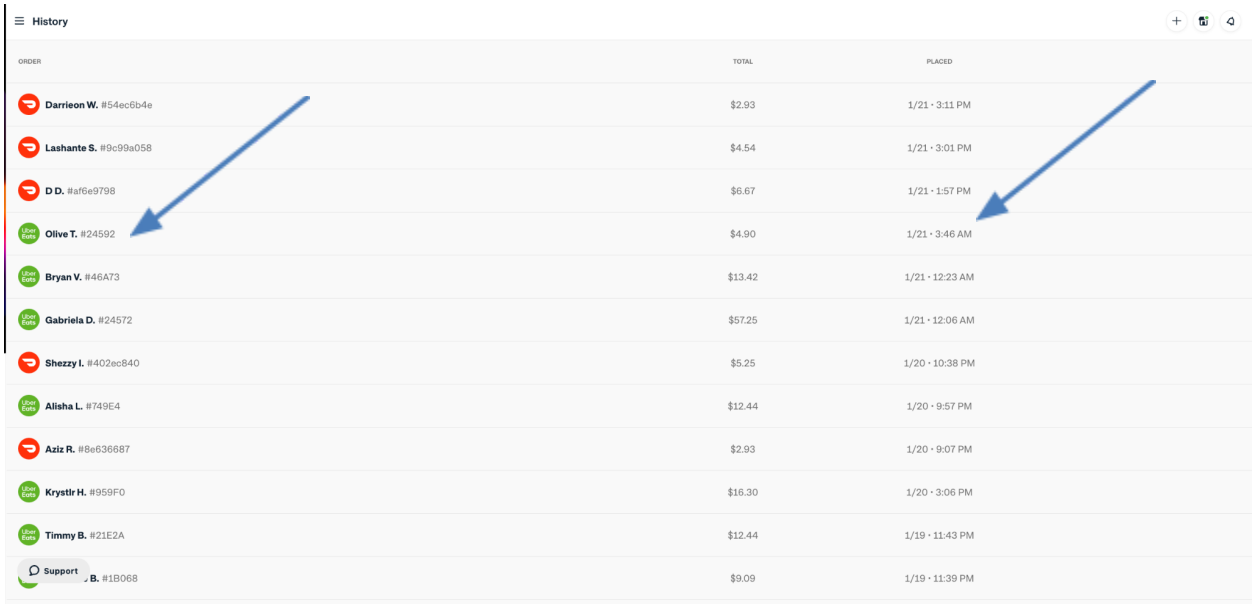
ORDER HISTORY PAGE |

The Order history page will show you any previous orders (canceled or accepted) and all of their information.

1. **CLICK** the Menu tab.



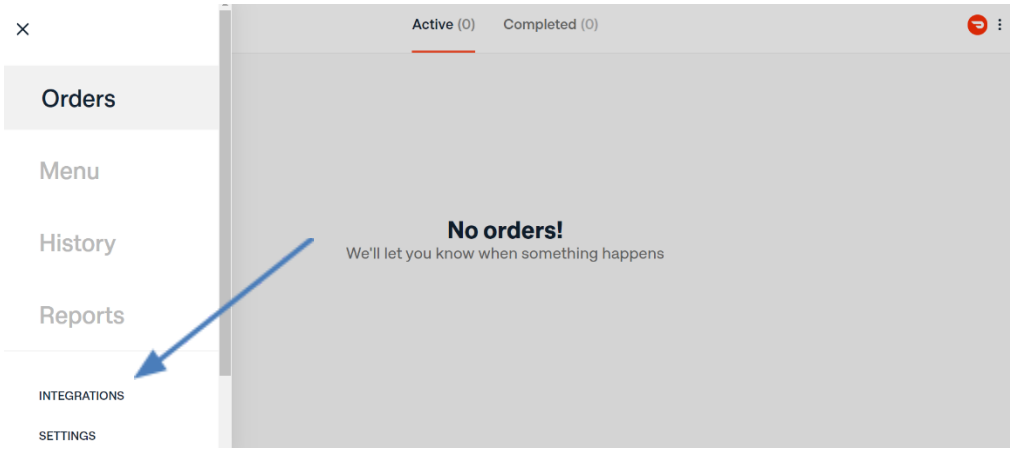
NOTE: You will see on the right side of the screen the dates that the orders happened. On the left side of the screen, you will see the delivery services and the customer's name. Just like on the order screen you can click into a past order and see more information.



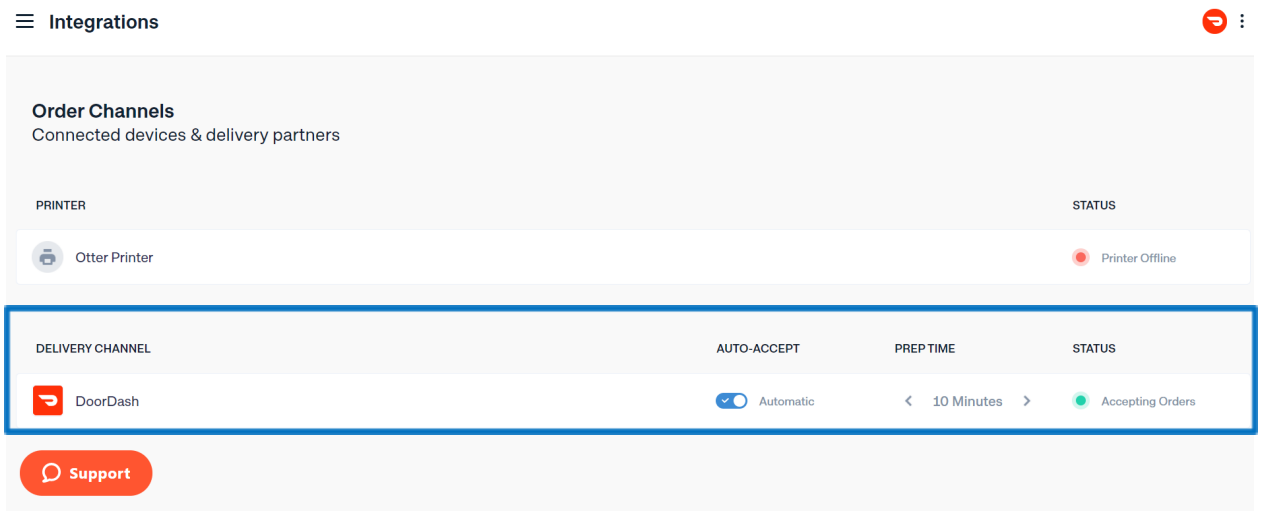
INTEGRATIONS PAGE |

The Integration page allows you to see the status of your delivery partners. This page is also where you'll update your prep time for your orders.

1. **CLICK** "Integrations" from the menu

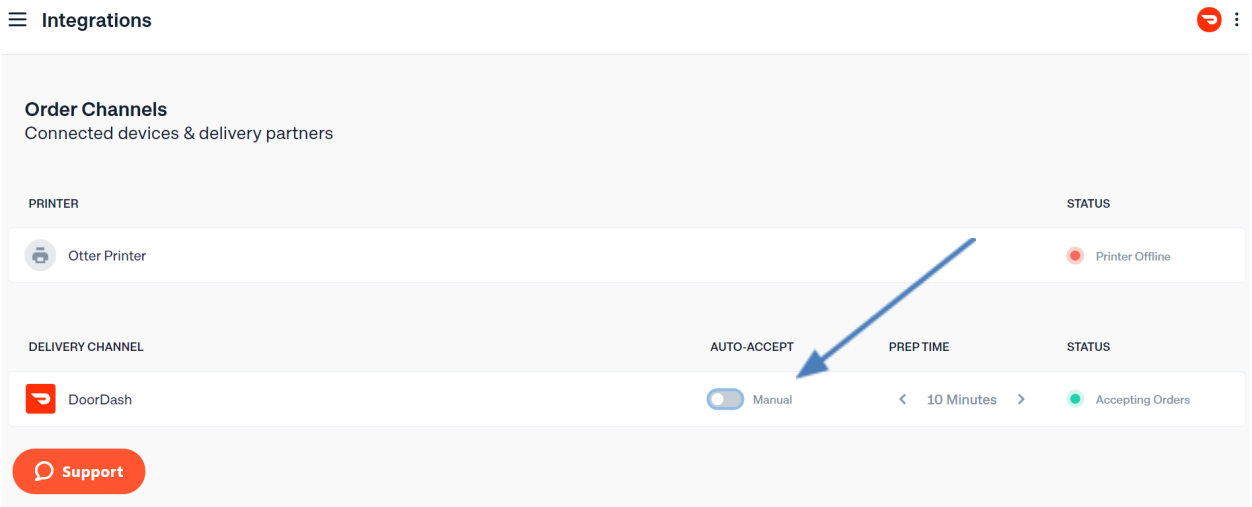


2. On the Integrations page, you can see the status of each delivery partner ("Accepting Orders" or "Offline"), as well as the Prep Time for orders for each delivery partner.
   NOTE: **CLICK** on the arrows next to the Prep Time to increase and decrease time as needed.



3. In the "Auto-Accept" field next to each delivery partner, **CLICK** on the blue button next to "Automatic" to change the status to "Manual." Tablets should always be set to "Automatic" for all delivery partners.

NOTE: "Auto-Accept" will automatically confirm orders on the tablet. We will use this feature to ensure that orders are accepted immediately.



ORDER ADJUSTMENTS |

Once orders are received in the tablet, they cannot be modified.

For any issues with the active orders, contact the customer directly (using the steps above). The customer contact number is listed on the order screen.

If the customer is unable to be reached, contact the delivery partner (i.e. Door Dash) via the number listed on the order screen. If needed, Team Members can also obtain this phone number by contacting the Otter Support Team through the chat function.

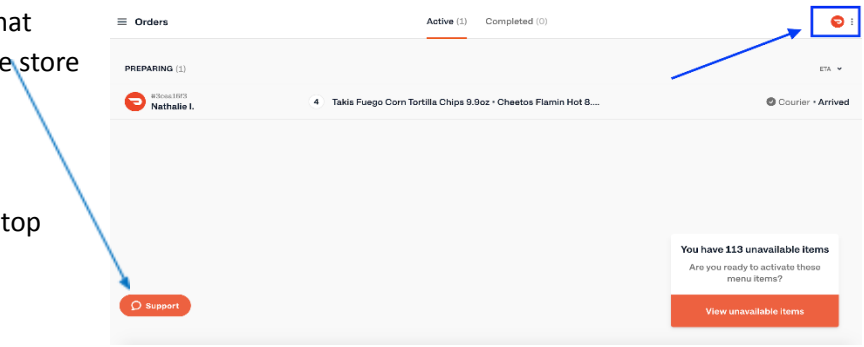
NOTE: For any orders that are unable to be filled because items are out of stock, if a logical modification choice to complete the order can't be made (i.e. using 2 Reese's two packs to replace an out of stock Reese's King Size four pack), cancel the order through the steps above.

MANUALLY TURNING OFF YOUR STORE FOR THE DAY |

If unplanned circumstances arise and you must turn off delivery services, Team Members can either contact Otter Support (step one) or turn services off via the tablet (steps 2 and 3).

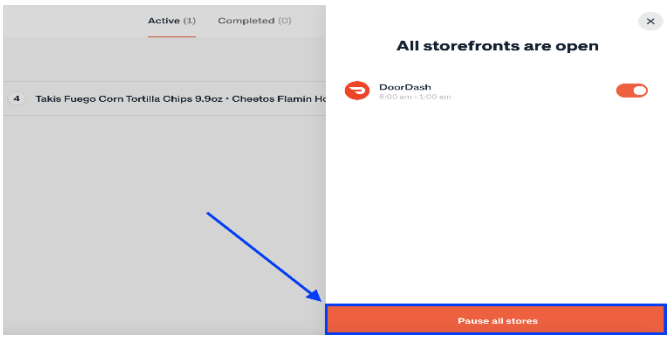
1. **CONTACT** Otter Support through the chat bubble and provide a length of time the store will be closed.

2. **TURN** off the store on the tablet.
   CLICK the delivery partner icons in the top right corner, a drop-down will appear.

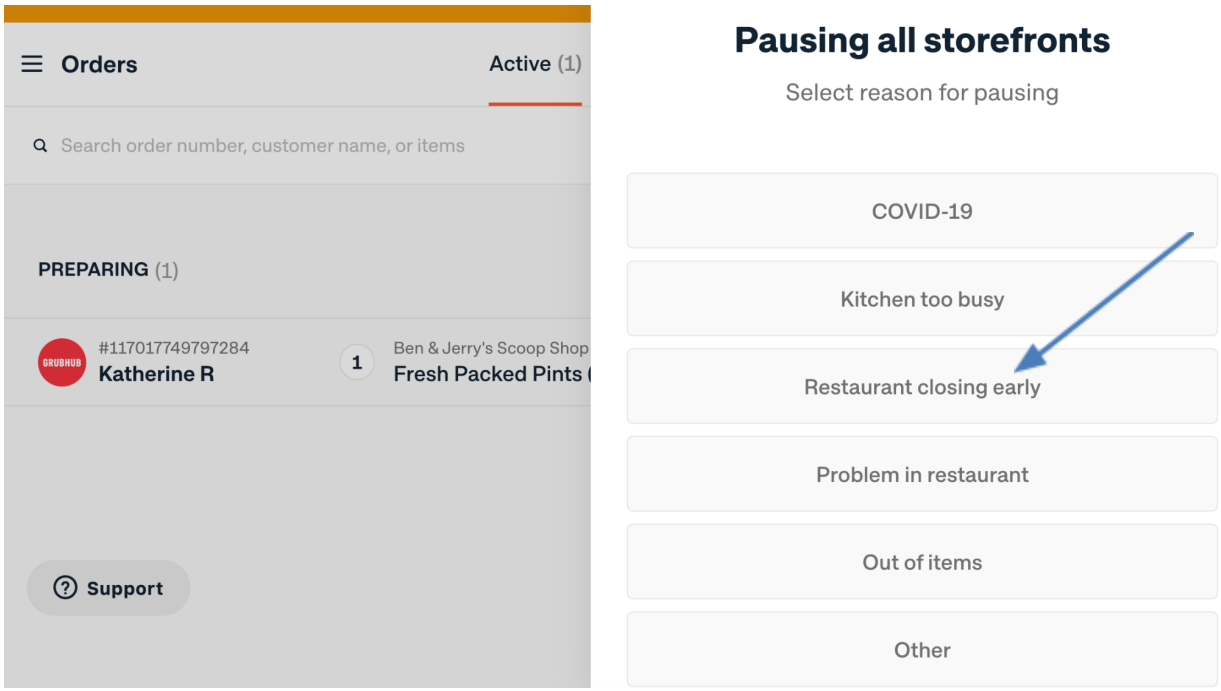


3. **CLICK** '*Pause all Stores'.*

   NOTE: If the option to deactivate a delivery platform is not available, **CONTACT** Otter Support Team through chat for the quickest response to fulfill your request.



4. **CLICK** on “Restaurant closing early”.



OTTER EMAIL SUPPORT |

CONTACT Otter Support through email at prioritysupport@tryotter.com or **SELECT** the Chat bubble on the tablet for the quickest response.

When emailing priortysupport@tryotter.com, please also cc connor.rowe@tryotter.com

OTHER DELIVERY PARTNER TABLETS |

Once the Otter tablet is set up, **TURN OFF** the other tablets and put them away in a safe place, as these tablets can be used if an outage occurs at Otter.

Ensure all Team Members know where the other tablets are and how to reactivate them in the unlikely event of a service outage.