



FREQUENTLY ASKED QUESTIONS

Theoretical Reporting Setup Service

OVERVIEW

What is the Theoretical Reporting Setup Service?

We know theoretical vs. actual reporting is key to maximizing your profitability, but getting your product mix (PMIX) mapped can be time consuming. With this consulting package, one of our industry experts will provide the training and support your team needs to finish your POS setup and start running theoretical reporting.

The service includes three 45-minute sessions with our team and will cover everything from PMIX mapping best practices to how to turn your theoretical reporting into results. (More on session content on the next page.)

What is PMIX mapping?

Before you can start running theoretical reports, you need to map your product mix (PMIX). This process involves connecting your POS buttons to products or recipes in MarginEdge, and it is the necessary first step before unlocking theoreticals.

With your product mix mapped, you will be able to:

- Engineer your menu for maximum profitability with our Menu Analysis tool.
- Reduce food costs by quickly spotting variances on our Theoretical Usage Report.

Contact your sales representative to learn more!

[me] marginedge

How much does the setup service cost?

The Theoretical Reporting Setup Service is \$250 for three 45-minute sessions.

When will I be billed?

Upon scheduling your first call, we will ask you to confirm the Setup Service via email. Then you will be billed on your next MarginEdge billing cycle, typically the next month. If you pay for your MarginEdge subscription annually, you'll be charged for the service in 30 days.

LOGISTICS

Are there set topics for each session?

In our first meeting, we typically work with your team to:

- Understand how to use MarginEdge to connect Products and Recipes to your point of sale system.
- Customize reporting to specify what is sold, added, removed, substituted, doubled, halved, etc.
- Better understand the relationship between Parent Items and Modifiers.
- Explain how to link modifiers and menu items to get more granular detail on customization and a la carte purchases.
- How to utilize, troubleshoot and employ the Theoretical Usage and Menu Analysis reports to turn your data into results.
- Review best practices in setting up your mappings so you get the most benefit for the least amount of work.

After your first session, your team will begin the product mix mapping process for your restaurant. Our second call typically involves spot checking your work and addressing any issues you've run into. By our third call, you'll be ready to dive into menu analysis and theoretical reporting like a pro.

Is there anything I should know before we start?

Before we get started, you'll need two things:

- **Your team in place**

Before you reach out, grab your teammate who is most familiar with your POS button set up, and make sure they are free for all three calls. (We want them to be as productive as possible for you!)

- **Your recipes in MarginEdge**

In order to map your buttons to recipes in MarginEdge, we need your recipes in our system. If you need an assist, we have a [Recipe Setup Service](#) that can help.

Note: If you're part of a restaurant group, we also recommend starting with the location that has the most complete POS setup to use as a model for your other locations.

How long does the process take?

The total time depends on how fast you work through your data mappings and how many products and recipes you choose to connect to your POS buttons.

We offer three 45-mins calls to assist you, but we're flexible on how quickly you use them. After your first call, you can decide to schedule your follow up calls as fast or slow as your group needs.

Once we start, how long until I get my theoreticals?

Once you're finished and your POS data is mapped, you will need to take and close two inventories in MarginEdge before you start to see any theoretical data pull through. Need help taking inventory? [We have an inventory reference guide for you!](#)

What happens if I have multiple locations? Does the service work for all locations?

At this time, the three Theoretical Reporting Setup Sessions need to be applied to the same location. You can use what you've learned to map each additional restaurants' product mix. (What you map in one location does not convey to others.)

If some or all of your locations have the same menu, we do offer a PMIX copying service for your convenience. This service only works if we can apply the same mappings across all your restaurants (i.e. the menu is virtually identical). The fee for this service is \$250 per location copied.