



# Olo Terms for Partners

## Introduction

Please refer to the below definitions for key Olo terminology to help familiarize your teams with our platform and tools.

### Admin

- Olo's backend system where we enter store data, brand information, and settings.

### Basket Test

- Validation test for POS integrated menu items.
- Available in Dashboard for customers to access or in Admin.
- It does not send the order to the store, performs a simple validation.
- For more information, please visit [the Help Center](#).

### Channel

- Olo's internal term for the restaurant brand that gets created in Admin. Each brand has a channel with settings that impact all stores. Within each channel, there's a company, and within each company, lives the brand's specific store locations.

### Customer Success Manager (CSM)

- A member of our Customer Success team who handles the direct relationship between Olo and each restaurant brand. Every restaurant brand works closely with their CSM on new projects and integrations.

### Dashboard

- The central tool used by restaurant brands and stores to manage their online ordering and delivery programs.
- Website: <https://my.olo.com>.
- For more information, please visit [the Help Center](#).

### Deployment Customer

- A restaurant brand who has not fully completed the Olo onboarding process.

### Deployment Team

- Part of our Customer Success team. This team manages the entire deployment process for restaurant brands from contract signing until 80% of their stores have gone live on the Olo platform. Once the 80% threshold is reached, they are introduced to their Customer Success Manager who handles the relationship from that point forward.

### Dispatch

- Olo's white-label delivery product allowing brands to enable third-party delivery through their branded site and app. Dispatch leverages multiple Delivery Service Providers (DSPs) to complete orders. [Read more about Dispatch here.](#)

### Delivery Service Provider (DSP)

- A partner company that handles the process of transporting a restaurant's order from the store location to the end customer via Dispatch or through third-party marketplaces via Rails.

### External Reference ID

- A customer-generated identifier used to distinguish different locations.

### Order Mode

- A designation for orders in the POS. i.e. Olo sends a different order type through to the POS if the order is pickup vs delivery. This allows brands to have different rules for these orders (eg. pickup orders go to counter 2, delivery orders go to counter 4). This helps with reporting and reconciling and makes it easier for them to logically break up orders in their POS reports.

### Handoff Mode

- This refers to how the customer can receive their order. Handoff modes can be Pick Up, Dine In, Carry Out, Delivery, Dispatch, Drive-Thru, etc.

### Maintenance Customer:

- A customer that has successfully deployed 80% of their online ordering program.

## Mealtime

- Mealtime refers to the standard online ordering “to go” website. This differs from other types of sites we can support such as catering, Switchboard, and kiosk.

## Menu Admin

- Website: <https://my.olo.com/menuadmin/>
- A section on Dashboard where menus are built and maintained. Only certain users have access to this tool.
- The Company Menu controls the menu at the Company Level. There is also a Store level menu where specific categories and menu items can be controlled at the Store level.
- For more information, please see our menu articles [on the Help Center](#).

## Merchant Account

- The account used by stores to accept credit cards.

## Metadata

- Used in Menu Admin to alter the Olo UI’s and/or to send custom data to a 3rd party. See [this article](#) for an example of how metadata can impact the Olo UI.

## MIM (Menu Image Management)

- The Menu Image Management tool on the Dashboard that enables brands to upload product and category images from Dashboard directly to their site.

## Modifiers

- Terminology for the menu options/choices that live within a product. For example, a modifier for a hamburger item may be “Add Ketchup”.
- All modifiers are a part of a modifier group.
- Modifier groups can be shared across multiple items.

## Nesting

- The concept of modifiers living underneath modifiers. For example, if someone orders a sandwich, they may have the option to select their protein (e.g. Choose Protein: Chicken, Steak, Carnitas). If they select “Steak” as an option, they may

be prompted with a required modifier group that asks what temperature they'd like their meat cooked at. This would only appear/be required if the customer selected Steak.

- Olo allows an unlimited amount of nesting so there could be multiple levels underneath certain modifier choices.

#### Point of Sale (POS)

- Traditional POS
  - These are POS systems that are installed in the restaurant typically on a Windows PC acting as the back of house POS server. Example POSs are Aloha, MICROS (3700), MICROS 9700, Symphony 2 (Standard and Premium), PAR PixelPoint, POSitouch, Xpient (Iris), Focus POS, MicroSale, RPOS, etc. These types of POS systems must have an Olo "agent" installed on a PC in the restaurant to use Olo.
- Cloud POS
  - These are POS systems that reside in the Cloud and the restaurant connects their in-store POS terminals to this cloud-based POS. Example POSs are PAR Brink, Revel, Toast, CBS Northstar, PDQ, NCR Silver/Silver Pro, and any OloCloud integration. The types of POS systems typically have some sort of vendor configuration value that determines which Olo vendor communications with which POS system. There is no Olo agent installation required for these POS systems.

#### Public Store

- A restaurant location that is live and on a brand's site or app.

#### Prepaid

- Payment is collected outside of Olo (ie: Rails partners, Kiosks, are the main examples.) This differs from credit card payment where Olo passes credit card information to the Payment Processor for processing.

#### Private Store

- A store that is not searchable on a brand's white-label site or app. The only way someone can access a Private store is if they have access to the store-specific URL. Stores are in Private mode before they are set Public.
- Demo vendors are frequently set to Private as well.

#### Rails

- Olo's software product that allows restaurant customers to place orders through marketplace sites like DoorDash, Postmates, and Caviar. Orders placed flow directly through to the restaurant POS system via Olo's API. For more info, please visit [Olo.com/help](https://olo.com/help).

### Specialist

- A member of the Olo Customer Success Team; specialist focuses on specific Olo products and integrations and helps our customers implement these settings on top of their ordering platform.

### Switchboard

- Olo's product that processes orders originating from a restaurant's call center. For more information, visit [the Help Center](#).

### Technical Specialist - POS

- Previously known as TAM. Part of the Customer Success team, TAM is an expert for one or multiple POS systems. A TAM works directly with customers to set up their POS, troubleshoot issues, etc. This team is now the POS Team (Technical Specialist - POS).

### Throttling

- Every order has a make time associated with it depending on the "Total Make Time" strategy and the items in the customer's cart. Our throttling mechanism evaluates the total make-time of all orders in a 15-minute period and allows restaurants to cap the total number of make time minutes for all orders.
- When a customer attempts to place an order during a time when the kitchen cannot support more orders, they are 'throttled' into the next available time slot.
- For more information, please see [here](#).

### Vendor

- Also known as a Location or a Store. A vendor is a legacy term used internally by the Olo team. Within Admin (backend) we refer to stores as vendors.

### Vendor ID

- A number that is generated and unique to each vendor within the Olo platform. It cannot be adjusted and is considered the "master" reference in our API.