ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 01 · RESTAURANT

# The Restaurant Stack

*The nine systems a restaurant runs on, which one to fix first, and where AI genuinely earns its keep.*

Knowledge Article I01

AI Stack Series · acrossthetable.biz

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## WHO THIS IS FOR

You run a restaurant, a cafe, a food truck or a bar. You already have a point-of-sale system because you cannot take money without one. Everything else you bought one piece at a time, usually in a hurry, usually because something broke.

This guide is for the owner who suspects the pieces do not talk to each other and is tired of typing the same numbers into three places. It is not for choosing a single app. It is for seeing the whole picture so you can decide what to fix first.

Nothing here requires a technical background. If you can run a Friday night service, you can run this.

## START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Customer → Order → Experience → Loyalty

Broken into the steps a customer actually moves through:

- Customer
- Reservation
- POS order
- Payment
- Customer data
- Marketing
- Loyalty
- Return visit

Read that line left to right. A guest finds you, books or walks in, orders, pays, and then either comes back or does not. Every system you own sits on one of those steps.

The reason this matters: a restaurant does not usually have a technology problem. It has a handoff problem. The reservation system knows the guest. The point of sale knows what they ordered. The email tool knows their address. If those three never speak, you are running a loyalty program on guesswork.

## THE STACK, PIECE BY PIECE

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Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

| Tool | The step it covers | What it is | Price |
|---|---|---|---|
| Toast | POS and restaurant operations | Point of sale built for restaurants — orders, payments, menus and reporting. | Per terminal/month plus processing. |
| OpenTable | Reservations and discovery | Reservations, waitlist and diner discovery. | Monthly plus per-cover fees. |
| 7shifts | Employee scheduling | Staff scheduling, shift swaps and labor cost tracking for restaurants. | Free tier; per location/month. |
| MarginEdge | Food cost and inventory | Invoice capture, food cost and inventory tied to your books. | Per location/month. |
| Canva | Menus and promotions | Design everything else — decks, social posts, flyers, simple video — with AI help built in. | Free tier; Pro per user/month. |
| ChatGPT / Claude | Marketing, SOPs, analysis | OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work. | Free tier; paid plans per user/month. |
| Mailchimp | Customer campaigns | Email campaigns, automations and audiences. | Free tier; per month by contacts. |
| QuickBooks | Accounting | The small-business accounting standard — books, invoicing, reporting. | Per month by plan. |
| Zapier / Make | Automation | Connects thousands of apps and AI models with no code. | Free tier; paid by task volume. / Free tier; paid by operations. |

Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

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If your restaurant is small enough that you are the manager, the marketer and the bookkeeper, you can run the first four rows and skip the rest for now.

### What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- Toast — Hardware plus per-terminal fees add up. Price the whole setup.
- OpenTable — Cover fees on network bookings.
- 7shifts — Only pays off if managers actually use it.
- MarginEdge — Needs consistent invoice entry.
- Canva — Easy to drift off-brand. Lock a brand kit.
- ChatGPT — It sounds confident when it’s wrong. Check anything that touches money, law or a customer.
- Claude — Same rule as any assistant: verify facts and never paste data you wouldn’t email.
- Mailchimp — Costs climb with list size.
- QuickBooks — Only as clean as your categorization habits.
- Zapier — Task-based pricing climbs fast once it works.
- Make — The canvas gets messy without naming discipline.

## WHERE AI ACTUALLY FITS IN THIS BUSINESS

AI-generated promotions, review analysis, menu descriptions, customer segmentation, demand analysis, SOP and training development, management reporting.

In plain terms, that means:

- Writing menu descriptions that sound like your restaurant instead of a generic food blog — then rewriting them for the delivery apps, which need shorter copy.
- Reading six months of reviews in one pass and telling you the three complaints that actually repeat, instead of the one that upset you most.
- Turning last year’s sales by day and weather into a plain-English answer to "how many should I prep for Saturday."
- Writing the training SOP for a station once, so the next new hire learns the same way the last one did.
- Drafting the promotion for a slow Tuesday in the time it used to take to find the Canva file.

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Notice what is not on that list: AI is not taking the order, cooking the food or greeting the guest. In a restaurant it does the paperwork around the hospitality, so the people can do the hospitality.

## WHERE ACROSS THE TABLE FITS

A disclosure before you read this part: this is a product direction from Across the Table, which is my own company. Treat it as an idea to judge on its merits, the same as anything else in this guide.

A smart-table experience fits here: table interaction → menu → ordering → offers → loyalty → review → relationship.

What makes a table interesting is that it is the one moment you have the guest's full attention and their phone in their hand at the same time. Every other loyalty program has to chase them afterwards.

## WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Get the point of sale right before anything else** Everything downstream reads from it. If your item names are a mess, your food costing, your reporting and your marketing will all be a mess. Spend a week cleaning up item names and categories. This is unglamorous and it is the highest-return week you will spend.
2. **Connect payments to accounting** Link the point of sale to QuickBooks so daily sales post themselves. This is the single biggest hours-saved change for most owners, and it is usually a setting rather than a project.
3. **Put scheduling in one place** Move the schedule off the group chat and the printed sheet into one tool the staff can see on their phones. Labor is your second-largest cost and you cannot manage it from a photo of a whiteboard.
4. **Start capturing customer information** A reservation system or a simple email signup gives you a list you own. Delivery apps keep their customer list; you need yours.
5. **Only then add food costing and marketing automation** These pay off, but they pay off on top of clean data. Running them on messy item names gives you confident wrong numbers, which is worse than no numbers.

## WHAT IT COSTS TO START

A restaurant stack has three kinds of cost and they behave very differently. Terminal-based pricing (your point of sale) scales with your physical footprint. Per-location pricing

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(scheduling, food costing) scales when you open a second location. Percentage-of-sale pricing (card processing, reservation covers) scales with every single dollar you take.

That last one is the one owners underestimate. A fee that sounds small is charged on every transaction forever. Before you sign anything with a per-cover or per-transaction fee, multiply it by your actual covers last year. Do that arithmetic on paper before the sales call, not during it.

The cheapest honest version of this stack: a point of sale you already have, the free tier of a scheduling tool, a free email tool under a few hundred contacts, and one paid AI assistant. Most of the spending decisions can wait until something is demonstrably costing you more than the software would.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

## THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

For a restaurant the two that bite hardest are card data and employment records. You do not store card numbers yourself — that is your processor's job, and it is a reason to use a real payment system rather than anything improvised.

Scheduling and tip records are employment records. Keep them where they can be produced if you are ever asked, and know your state's rules on breaks, tip pooling and minor hours before you let any tool schedule automatically.

If you use AI to analyze reviews or customer data, do not paste customer names and contact details into a free consumer chatbot. Strip the identifying details first, or use a paid plan with the data controls turned on.

## MISTAKES THAT COST THE MOST

- Buying the system with the best demo instead of the one that connects to what you already run. The integration matters more than the interface.
- Signing a long processing contract because the hardware is free. The hardware is never free; it is priced into the rate.
- Letting the delivery apps own the customer relationship. They are a sales channel, not a marketing list.

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- Adding food-costing software before the item names are clean, then not trusting the numbers it produces.
- Running promotions from the gut when you already own the sales data that would tell you which night actually needs help.

## THE CEO DECISION

- Which step of the line — find, book, order, pay, return — is losing you the most money right now? Fix that one.
- Are you paying a percentage on something you could pay a flat fee on, or the other way around? At your volume, one of those is wrong.
- Do you own a customer list, or does a delivery app own it?
- If your manager left tomorrow, is the schedule, the prep list and the training in a system, or in their head?
- What is the one number you check every morning, and does it come out of a system automatically or does someone type it?

## YOUR QUICK REVIEW

- ☐ I can name which system holds my customer list.
- ☐ My daily sales post to accounting without anyone typing them.
- ☐ My item names in the point of sale are clean and consistent.
- ☐ My staff can see next week’s schedule on their phones.
- ☐ I know what percentage I pay on every card transaction.

## ADDITIONAL RESOURCES

| Tool | Where to find it | What it is for |
|---|---|---|
| Toast | pos.toasttab.com | Full-service and quick-service restaurants running one system front and back. |
| OpenTable | www.opentable.com | Restaurants who need to be found and booked. |
| 7shifts | www.7shifts.com | Managers building schedules around labor targets. |
| MarginEdge | www.marginedge.com | Restaurants who want real plate costs, not guesses. |

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| Tool | Where to find it | What it is for |
|---|---|---|
| Canva | www.canva.com | Small teams with no designer who still need consistent-looking work. |
| ChatGPT / Claude | chatgpt.com / claude.ai | Your default thinking partner when you want one tool that does most jobs well. |
| Mailchimp | mailchimp.com | General small-business email marketing. |
| QuickBooks | quickbooks.intuit.com | Clean books your accountant already knows how to read. |
| Zapier / Make | zapier.com / www.make.com | Your first automations, and the widest app coverage. |
| Across the Table AI Assessment | acrossthetable.biz/#assessment | Fifteen minutes. Tells you which job to start with before you buy anything. |
| The Scaling Edge | acrossthetablebiz.substack.com | Weekly newsletter for owners without a business background. |

### Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Connect the tools — acrossthetable.biz/knowledge-articles/connect-the-tools/ (covers Zapier, Make)
- Make the deck — acrossthetable.biz/knowledge-articles/make-the-deck/ (covers Canva)
- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)
- Market by email — acrossthetable.biz/knowledge-articles/market-by-email/ (covers Mailchimp)

## CONTINUE LEARNING

The next step is not another app. It is fifteen minutes with the Across the Table AI Assessment, which asks what your business actually does and tells you which job to start with.

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If you want the detail on any one piece, the guides listed above compare the three main tools for that job side by side, in the same plain language as this one.

## READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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