**How to Track Your Reusables Using the POS System**

**1. Define what you want to measure**

Start by deciding what metrics matter most to you. Do you want to track sales of single-use items versus reusables? Or perhaps you want to break down reusables further into categories like dine-in, BYO, and your cup swap system or mug library?

You'll need to create specific buttons in your POS for each option you want to measure. If you already offer a BYO discount and track it in your POS, you’re ahead of the game!

### **2. Configure Your POS**

No matter which POS system you use, the key is to create buttons that will record data for reports, allowing you to track progress monthly.

We’ve provided setup instructions below for the most popular systems—Square, Shopify and Lightspeed.

Once set up, do a few trial runs to ensure everything works smoothly and integrates seamlessly.

**SQUARE**

### **1. Enter Products in Square**

* **Create Separate Items**: Start by creating individual items for reusable cups and single-use cups (and other options you’d like to measure).
  + In your Square Dashboard, go to **Items** > **Create an Item**.
  + Enter the details for each cup type (e.g., "Reusable Cup" and "Single-Use Cup").
  + Save each item after entering the details.
* **Use Item Categories**: To organise these products, you can create categories such as "Reusable Cups" and "Single-Use Cups."
  + Go to **Items** > **Categories** > **Create a Category**.
  + Name the categories and assign the relevant items to each category.
  + This categorisation will make it easier to track and compare sales later.

### **2. Set Up Square POS**

* **Add Items to POS**: Ensure that the reusable and single-use cups are available in your Square POS app.
  + In the Square POS app, go to **Items** and verify that both reusable and single-use cups are listed.
  + If they aren’t already, add them manually to ensure they can be selected during transactions.
* **Organize Your POS Screen**: Customize your POS screen layout for easy access to these items.
  + Go to **Items** > **Manage Item Library**.
  + Arrange the buttons in a way that makes them easy to find during transactions, such as grouping them together by category.

### **3. Implement Discounts or Incentives**

* If you want to encourage BYO cups, you can set up discounts that apply only to these items.
  + Go to **Items** > **Discounts** > **Create a Discount**.
  + Choose the discount type (e.g., percentage or fixed amount) and set it to apply to the "Reusable Cups" category.
* **Track Discount Usage**: Monitor how often the discount is used by generating a report that shows discount usage.

### **4. Track Sales Through Square Reports**

* **Use Sales Summary Reports**: Square provides sales summary reports that can help you track the performance of different items or categories.
  + In your Square Dashboard, go to **Reports** > **Sales Summary**.
  + Filter the report by **Item** or **Category** to compare sales between reusable and single-use cups.
  + This report will show you the total sales, quantities sold, and other relevant metrics for each product.
* **Create Custom Reports**: If you need more detailed insights, you can create custom reports.
  + In **Reports**, use the **Custom Reports** feature to set specific parameters, such as date ranges, to compare the sales of reusable and single-use cups over time.

**SHOPIFY**

### **1. Set Up Product Categories**

* **Create Separate Products**: If you haven't already, create separate products for your reusable cups and single-use cups in your Shopify store.
  + Go to **Products** > **Add product**.
  + Enter the product details for each cup type (e.g., "Reusable Cup" and "Single-Use Cup").
  + Make sure to clearly distinguish the products in their titles and descriptions to avoid confusion.
* **Use Product Tags or Collections**: You can also use product tags or collections to group these items.
  + **Tags**: Add tags like "Reusable" and "Single-Use" to each product.
  + **Collections**: Create two separate collections—one for "Reusable Cups" and another for "Single-Use Cups."
    - Go to **Products** > **Collections** > **Create collection**.
    - Name the collections appropriately and add the relevant products to each collection.

### **2. Set Up Shopify POS**

* **Add Products to POS**: Ensure that the reusable cups and single-use cups are added to your Shopify POS system.
  + In the Shopify POS app, go to **Products**.
  + Search for the reusable and single-use cups and add them to your POS catalog.
* **Categorise Products in POS**: If you're using collections, you can categorise these products in your POS system by collections to make it easier to track sales later.

### **3. Apply Discounts for Reusable Cups**:

* If you want to encourage the use of reusable cups, you can set up discounts.
  + Go to **Discounts** > **Create discount**.
  + Choose a discount type (e.g., a percentage off or a fixed amount off) and apply it specifically to the "Reusable Cups" collection.
* **Track Discount Usage**: Use reports to track how often the discount is applied.

### **3. Track Sales Through Reports**

* **Use Sales Reports**: Shopify’s reporting features allow you to track sales of specific products or collections.
  + Go to **Analytics** > **Reports** in your Shopify admin.
  + Under **Sales reports**, look for reports that break down sales by product, product type, or collection.
  + Filter the report to show sales data for the "Reusable Cups" collection versus the "Single-Use Cups" collection.
* **Create Custom Reports**: If you need more specific data, you can create custom reports.
  + In **Reports**, select **Create custom report**.
  + Set up filters to compare sales between reusable and single-use cups.

**LIGHTSPEED**

### **1. Create Product Categories**

* In **Lightspeed Back Office**, go to **Menu Management > Products**.
* Add separate product items for:
  + **Reusable Cup**
  + **Single-Use Cup**
* Assign each item to a **category**, e.g., “Reusable” and “Single-Use.”
* Save your changes.

### **2. Set Up Modifiers for Reusable Options**

Modifiers help staff **apply reusables correctly** in transactions.

* Go to **Menu Management > Modifiers**.
* Create a **new modifier group** (e.g., “Cup Type”).
* Add modifiers under this group:
  + **Reusable Cup**
  + **Single-Use Cup**
* Assign the **modifier group** to all applicable drink items (e.g., coffee, tea, smoothies).
* Save and test the setup.

### **3. Set Up Discounts for BYO Cups (Optional)**

If offering a **BYO cup discount**, configure this in **Discounts**.

* Go to **Discounts > Create Discount**.
* Choose **Fixed Amount** or **Percentage Discount**.
* Apply it only to the **Reusable Cup** category.
* Save and test with a sale.

### **4. Generate Reports to Track Reusable Sales**

Lightspeed reporting allows you to track **single use vs. reusable cup sales**.

* Go to **Reports > Sales by Product**.
* Filter by **category** (Reusable Cups vs. Single-Use Cups).
* View total sales, quantities sold, and trends over time.
* Export data for tracking progress.