Takeout and Delivery

A practical system for travel-ready menus, accurate orders and clearer channel economics.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Treat off-premise service as its own operating system, not a dining-room order in a bag. These five guide pages and six editable sheets help you test a smaller menu, specify packaging, check orders and compare direct contribution by channel.

Inside this toolkit

1. Choose a menu that survives the journey
2. Specify packaging as carefully as a recipe
3. Build an accuracy check before sealing
4. Calculate contribution on the actual fee basis
5. Pilot capacity before adding more orders

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Choose a menu that survives the journey

Start with a small set of dishes your kitchen can produce consistently during existing service. Test the complete journey: waiting, packing, travel, customer unpacking and eating. A dish that looks good at the pass may arrive with mixed textures, spilled sauce or unclear assembly instructions.

- Record the exact dish version, portion, packaging and intended channel. Test the same recipe that will be sold.
- Assess appearance, texture, leakage, ease of eating and completeness at the realistic delivery intervals you are evaluating. These quality-test intervals are not safe holding limits.
- Try separating wet and crisp components, simplifying garnish or changing the package before changing the whole recipe.
- Remove dishes that cannot reliably meet your standards under approved food-safety controls. More menu items can create more mistakes and slower service.
- Confirm the description, modifiers, price and availability on each channel. Give one person responsibility for keeping versions synchronized.

Scope: this toolkit does not establish safe delivery times, temperatures, allergen guarantees or labeling compliance. FDA’s Food Code is a model; your PIC, locally adopted rules and approved procedures govern the operation. (Source 1)

Pilot check: can a colleague unfamiliar with the dish unpack it, identify each component and eat it as intended without guessing? Record what needs to change before listing it for guests.

Specify packaging as carefully as a recipe

Create a package specification for each item: container, lid, liner where appropriate, separate sauce cup, label, bag and tamper-evident feature where required or chosen. Verify that the supplier’s product is suitable for its intended food contact and use; do not infer suitability from appearance.

- Test fit, sealing, leakage, stacking and whether the full order stays stable in its bag.
- Check temperature and moisture interactions under your approved process. Keep incompatible hot, cold, wet or crisp components arranged as the PIC and quality test require.
- Make the packing sequence repeatable: container, components, label, order check, closure and handoff.
- Record the approved packaging SKU and a reviewed substitute. A visually similar lid may not fit or perform the same way.
- Use only substantiated disposal or environmental claims; local collection rules and packaging details can differ.

FDA’s delivery guidance highlights packaging, temperature control, contamination prevention and allergen controls. Use these as subjects for your site-specific procedure review, not as a claim that a particular container makes food safe. (Source 2)

Hypothetical test	Observed issue	Next test
Crisp item packed with sauce	Texture softened	Separate sauce
Two bowls stacked in bag	Lower lid deformed	Different load arrangement
Label on steam-prone surface	Order ID became unreadable	Approved alternate placement

Cost check: total every packaging component per order, including small items often omitted. A better container can still be the better option if it reduces verified spills or remakes; test the complete cost rather than only unit price.

Build an accuracy check before sealing

Use a single readable order ticket. An assembler builds the order; a checker verifies the contents before the bag is sealed. Where one person fills both roles, use two distinct passes rather than checking from memory while packing.

- Check item name, quantity, size, requested modifiers, included sides, sauces, drinks and any separately packed components against the current ticket.
- Route allergen requests through the PIC-approved process. Do not rely on a bag note to replace recipe knowledge or cross-contact controls, and never silently substitute.
- Mark multi-bag orders clearly, for example “1 of 2” and “2 of 2,” using an order ID rather than unnecessary personal details.
- Record ready time and release time, then verify the order identity with the authorized collector under your process. Do not leave handoff responsibility unclear.
- Define what happens when a driver is late, an item is missing or a seal is damaged. The PIC decides safety questions; the authorized manager handles service recovery.

Worked example: a two-person order includes two mains, two drinks and one side packed separately. The check should cover five components and both bags, not merely two main dishes. Attach the final order identifier only after confirming the contents.

Measure order accuracy as orders without a verified restaurant-caused error divided by fulfilled orders. Keep a reason code for each error. A refund alone may not identify whether the cause was restaurant packing, courier handling or another issue.

Calculate contribution on the actual fee basis

Use a representative order for each channel. Read the current merchant agreement and settlement statement for fee bases, discounts and adjustments. Commission may use a different base from the cash received. Avoid counting a processing fee twice if it is already included.

Illustrative order, dollars	Amount
Menu subtotal less $2 restaurant-funded discount	30 − 2 = 28.00
Commission: assumed 20% of $30 subtotal	6.00
Food cost	9.00
Packaging	1.20
Incremental fulfillment labor	3.00
Separate processing fee, if actually charged	0.90
Direct contribution before other costs	7.90

Calculation: $28 − $6 − $9 − $1.20 − $3 − $0.90 = $7.90. This is not profit. Rent, other labor, overhead, tax treatment and unlisted costs are excluded. The rates are hypothetical, not current platform pricing. Exclude sales tax and tips from this simplified revenue basis and confirm accounting treatment with your adviser.

- Use restaurant-funded discounts and actual refunds once. Do not subtract a platform-funded promotion unless the settlement charges it to you.
- Separate fixed monthly fees from per-order costs, then test their allocation at realistic order volume.
- Include incremental labor without also allocating the same labor cost elsewhere in the model.
- Compare expected contribution with actual settlement results. A positive estimate is not evidence that the whole channel is profitable.

Pilot capacity before adding more orders

Run a limited pilot with a clear menu, service window and responsible lead. Measure off-premise orders alongside dine-in performance. New sales are not useful if the combined operation repeatedly misses promises or overwhelms the team.

Measure	How to use it
Promise misses / fulfilled orders	Shows whether quoted readiness is realistic
Verified restaurant errors / fulfilled orders	Identifies packing and ticket weaknesses
Ready-to-release delay	Separates kitchen readiness from collection delay
Contribution per order	Compares channels on a consistent basis
Dine-in delay / complaints	Checks whether capacity was displaced

Hypothetical week: seven verified restaurant errors across 200 fulfilled orders is a 3.5% error rate. If five are missing drinks, revise the drink handoff rather than retraining every kitchen process. Review whether the fix works over the next comparable period.

- Assign authority to adjust availability, quoted times or channel pauses using actual workload.
- Investigate differences by dish, time and channel before changing the full menu.
- Keep refund and incident records linked to order IDs in your normal restricted systems.
- Recheck packaging after supplier substitutions and menu tests after recipe changes.
- Expand one constraint at a time: menu, hours or order capacity. Preserve a comparison period so you can see what changed.

Next step: select five candidate dishes, complete the journey test and cost one typical order before widening availability.

Menu travel-suitability test

Dish / recipe version: _____ Date: _____ Tester: _____ Channel: _____

Packaging version: _____ Journey conditions: _____ PIC procedure reference: _____

Observation point	Texture / appearance	Leakage / integrity	Ease of eating
At pack-out	_____	_____	_____
Test interval: _____	_____	_____	_____
Test interval: _____	_____	_____	_____
Customer unpacking	_____	_____	_____

Missing / unclear components: _____

Change to dish, package or instructions: _____

Retest date / result: _____

Decision: list / revise / omit. Approved by: _____

Quality test only. Intervals and observations do not establish food safety or replace the PIC’s required controls.

Packaging specification and test record

Dish or order type: _____ Specification version: _____ Owner: _____

Component	Approved SKU / size	Unit cost	Reviewed substitute
Main container / lid	_____	_____	_____
Sauce / side container	_____	_____	_____
Label / seal	_____	_____	_____
Bag / support	_____	_____	_____
Other included item	_____	_____	_____

Supplier intended-use information reference: _____

Packing sequence: _____

Leak / stack / fit / readability test and result: _____

Temperature, contamination and allergen procedure references: _____

Total packaging cost per typical order: _____ Calculation checked by: _____

Substitution review trigger / retest date: _____

Order assembly and accuracy check

Order ID: _____ Channel: _____ Promised ready time: _____

Assembler: _____ Checker: _____ Total bags: _____

Check before sealing	Result / initials
Correct order ticket / version	_____
Items, quantities and sizes match	_____
Modifiers reviewed and fulfilled	_____
Allergen requests handled per approved process	_____
Sides, sauces, drinks and utensils as ordered	_____
Separate components and all bags identified	_____
Packaging / seal / label checked	_____
Required PIC release checks completed	_____

Exception / action / approving person: _____

Ready time: _____ Released time: _____ Release verified by: _____

Do not silently substitute or seal an order with an unresolved required check.

Dispatch and handoff exception log

Date / shift: _____ Lead: _____ Approved handoff procedure: _____

Order ID	Ready / release	Exception	Action / owner	Closed at
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Reason codes: delayed collection / wrong collector or order / missing component / damaged package / other.

PIC decision record reference where required: _____

Service recovery authorization / record reference: _____

Recurring issue for the weekly review: _____

Use order references, not unnecessary customer information. Do not treat waiting-time entries as approved food-safety limits.

Per-order contribution worksheet

Channel: _____ Order type: _____ Date: _____ Currency: _____

Use a consistent before-tax, excluding-tip basis. Verify actual fee bases and avoid double counting.

Revenue or cost	Basis / source	Amount
Menu subtotal	_____	_____
Restaurant-funded discount / refund	_____	_____
Net restaurant revenue	Subtotal less adjustments	_____
Commission	Rate and applicable base	_____
Food cost	Recipe / inventory basis	_____
Packaging	All components	_____
Incremental labor	Time and cost assumption	_____
Other separate per-order charges	Check not already included	_____
Direct contribution	Net revenue − listed costs	_____

Fixed fees / overhead / other excluded costs: _____

Volume or cost sensitivity tested: _____

Settlement statement checked on: _____ Reviewer: _____

Direct contribution is not net profit.

Weekly channel performance review

Week: _____ Channel: _____ Reviewer: _____

Measure	Current period	Comparable period	Cause / action
Fulfilled orders	_____	_____	_____
Promise misses / orders	_____	_____	_____
Restaurant errors / orders	_____	_____	_____
Typical ready-to-release delay	_____	_____	_____
Direct contribution per order	_____	_____	_____
Dine-in impact	_____	_____	_____

Top recurring error and source order IDs: _____

One change to test: _____

Owner / start date / review date: _____

Menu, package or availability version changed: _____

Decision: retain / revise / pause / expand. Evidence and authority: _____

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

FDA: Food Safety Best Practices for Online Delivery Services

Delivery planning should address packaging, temperature control, contamination and allergen controls. Accessed 23 October 2026.

https://www.fda.gov/food/hfp-constituent-updates/fda-highlights-best-practices-food-safety-online-delivery-services

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.