

Revel iPad Point of Sale

Management Console User Guide

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Revel
SYSTEMS

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Introduction

Delivery Management is a tool used for tracking deliveries, estimating delivery time, and viewing order details and driver histories. The system is capable of optimizing delivery routes by calculating the time it takes to prepare food and add it to the time it takes to deliver the order to the customer.

The tool also includes a structured end-of-delivery procedure to maintain accurate delivery reports and the insight required to run a successful delivery business.


NOTE: The delivery settings in the Management Console must be configured before using the Delivery Management tool on the iPad POS.

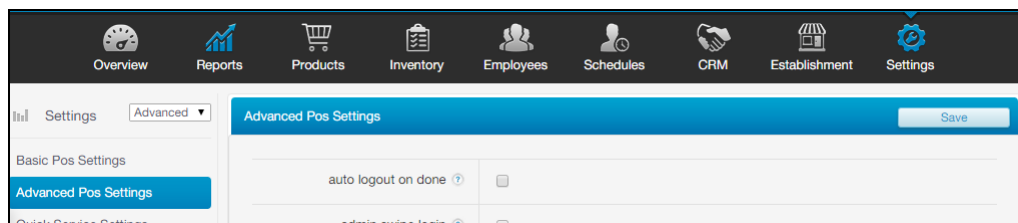
For assistance setting up the Management Console contact Revel Systems Onboarding team at 415.744.1433 ext 4 or send an email to onboarding@revelsystems.com.

Management Console

Configuring Delivery Management Settings

NOTE: Only users with administrator permissions have access to the POS Management Console. The Settings page configures all POS system settings including roles and permissions. For more information see "[Role and Permissions](#)" on page 7.

1. Log in to the Management Console.
2. Click the  icon, the Settings page opens.
3. Click on **Advanced Pos Settings** located on the left side of the screen. The Advanced Pos Settings page opens.




4. Scroll down the page to the Delivery section of the Settings page.
5. Configure the delivery settings.

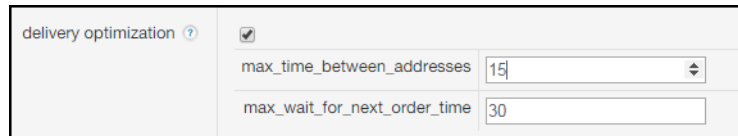
Delivery Optimization

Delivery Optimization recommends deliveries that the driver should include with their assigned orders. The system displays a green flag over all unassigned orders the driver should include when they check-out for delivery. These added orders increase the efficiency of the driver's route and decreases the time it takes an establishment to deliver all orders.

Configuring Delivery Optimization

1. Log in to the Management Console.
2. Click the  icon, the Settings page opens.
3. Click on **Advanced Pos Settings** located on the left-hand side of the screen. The Advanced Pos Settings page opens.
4. Scroll down the page to the Delivery section of the Settings page.

5. Select the delivery optimization check box to enable delivery optimization and then define the following:



The screenshot shows a settings panel for 'delivery optimization'. It includes a checked checkbox, a dropdown menu for 'max_time_between_addresses' set to '15', and a text input field for 'max_wait_for_next_order_time' set to '30'.


- a) Enter the maximum time for deliveries to be scheduled from one address to another in the “max_time_between_addresses” field,
- b) Enter the maximum wait time allowed between one delivery to another in the “max_wait_for_next_order_time” field.

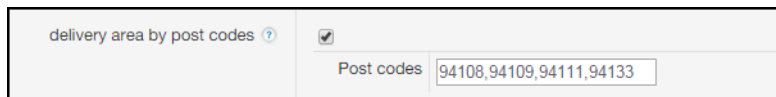
Delivery Area

A delivery zone can be defined by using one of the following methods:

- Postal Codes — Defines the delivery area by entering zip codes in the Postal code field.
- GeoJson Region — Defines the delivery area by drawing a region on a map. GeoJson automatically generates a script (code) of a drawn area that can be easily copied and placed into the GeoJson delivery field.


Defining the Delivery Area Using Zip Codes

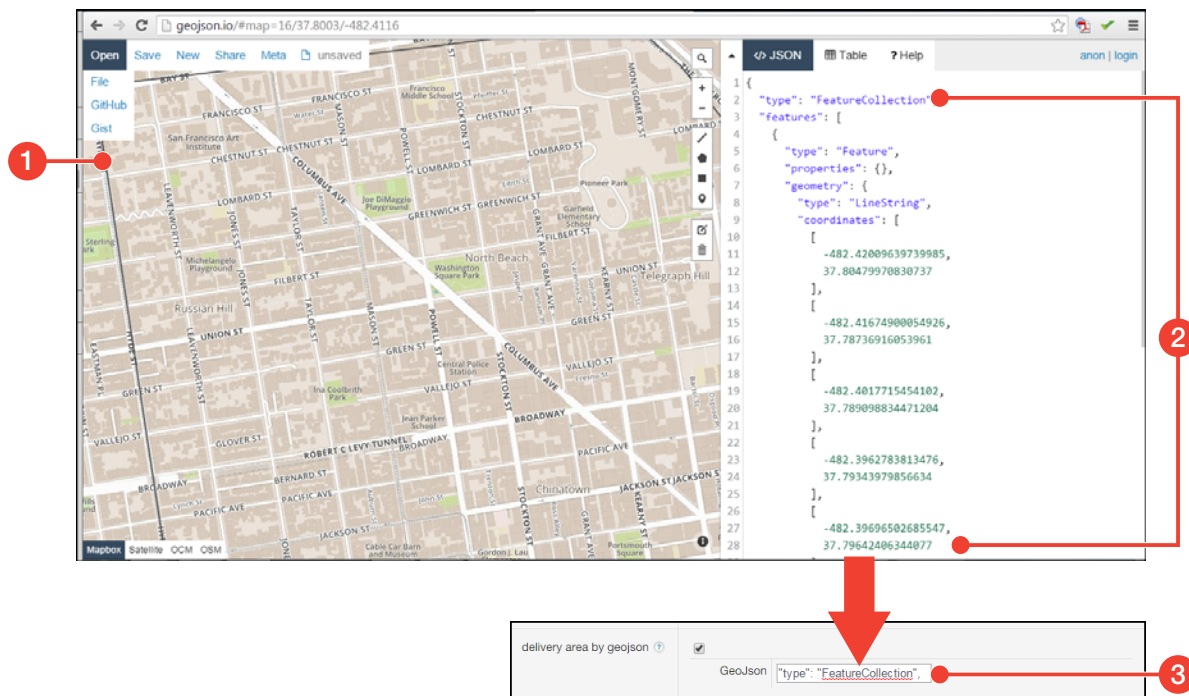
1. Log in to the Management Console.
2. Click the  icon, the Settings page opens.
3. Click on **Advanced Pos Settings** located on the left-hand side of the screen. The Advanced Pos Settings page opens.
4. Scroll down the page to the Delivery section of the Settings page.
5. Check the box to the right of “delivery area by post codes”.
6. Enter the post codes in the Post codes field. **Use a comma between the post codes. Do not enter a space after a comma.**



The screenshot shows a settings panel for 'delivery area by post codes'. It includes a checked checkbox and a text input field labeled 'Post codes' containing the value '94108,94109,94111,94133'.

Defining the Delivery Area Using Geojson

1. Log in to the Management Console.
2. Click the  icon, the Settings page opens.
3. Click on **Advanced Pos Settings** located on the left-hand side of the screen. The Advanced Pos Settings page opens.
4. Scroll down the page to the Delivery section of the Settings page.
5. Check the box to the right of “delivery area by geojson”.
6. On a Web browser go to <http://geojson.io/> and do the following:
 - a) Define the delivery area on the GeoJson map using the supplied tools.
 - b) Copy the script located to the right of the map.
7. Paste the script in the GeoJJson field located in Delivery section.



- 1 Web browser view of GeoJJson Map.
- 2 Web browser view of GeoJJson Script.
- 3 GeoJJson field located in the Delivery section of the Management Console.

Role and Permissions

NOTE: The Delivery Management roles and permissions are automatically created when the Delivery options are configured. For more information see "[Configuring Delivery Management Settings](#)" on page 4.

Roles are the assigned position the employee holds. Permissions define the tasks that the employee can perform when assigned to a role.

Two roles are automatically created to perform all Delivery Management tasks:

- Driver — The Driver has permission to answer incoming calls, send messages, add extra items to an order, create and receive open orders. The driver also has till access and can use a virtual till. For more information see "[Shift Start](#)" on page 18.
- Driver Manager — The Driver Manager controls all aspects of the delivery process. They assign drivers to an order, adjust tips, check-in drivers, end a drivers shift, adjust mileage, and cash in/out for an employee. The Driver Manager can also approve a delivery to an address outside the approved delivery area. For more information see "[Delivery Area](#)" on page 5.

Overview of the Delivery Settings

The screenshot shows the 'Delivery' settings page. On the left, there is a vertical list of settings, each preceded by a red circle with a white number. Red lines connect these numbers to the corresponding settings on the right. The settings on the right are as follows:

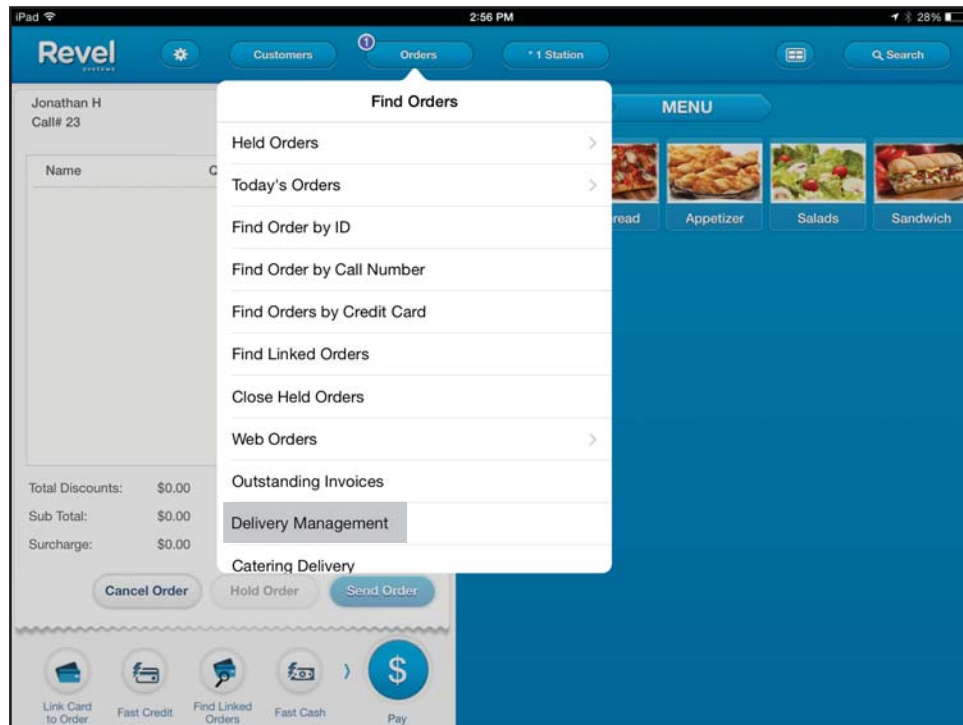
- 1: auto capture customer information for delivery ? ☐
- 2: catering delivery tracking ? ☐
- 3: delivery driver tracking ? ☐
- 4: delivery orders subject to cold taxation rules ? ☐
- 5: transfer ownership of delivery orders to driver ? ☐
- 6: delivery optimization ? ☐
- 7: delivery area by post codes ? ☐
Post codes:
- 8: delivery area by geojson ? ☐
GeoJson:
- 9: Display orders ready in the next X minutes ?

- 1 Prompts the POS user to add a customer address when Delivery is selected as the dining option.
- 2 Turns on access to catering tracking and reporting.
- 3 Turns on the delivery tracking and reporting functions.
- 4 Sets the taxation rule for the delivery of “Cold” items.
- 5 Allows the transfer of a delivery from one driver to another driver.
- 6 Identifies orders that should be added to the drivers deliveries.
- 7 Sets the delivery area with user-defined postal codes. For more information see "[Defining the Delivery Area Using Zip Codes](#)" on page 5.
- 8 Defines the delivery area using the GeoJson.com tool. For more information see "[Defining the Delivery Area Using Geojson](#)" on page 6.
- 9 Defines the time range, in minutes, when orders will appear on the delivery console as ready for delivery.
- 10 Sets the delivery management display to miles or kilometers.

iPad POS

Accessing the Delivery Management Screen

1. Log in to the POS.
2. Tap Orders the Order drop-down menu opens
3. Select Delivery Management from the drop-down menu. The Deliver Console - Map View is displayed on the iPad POS.

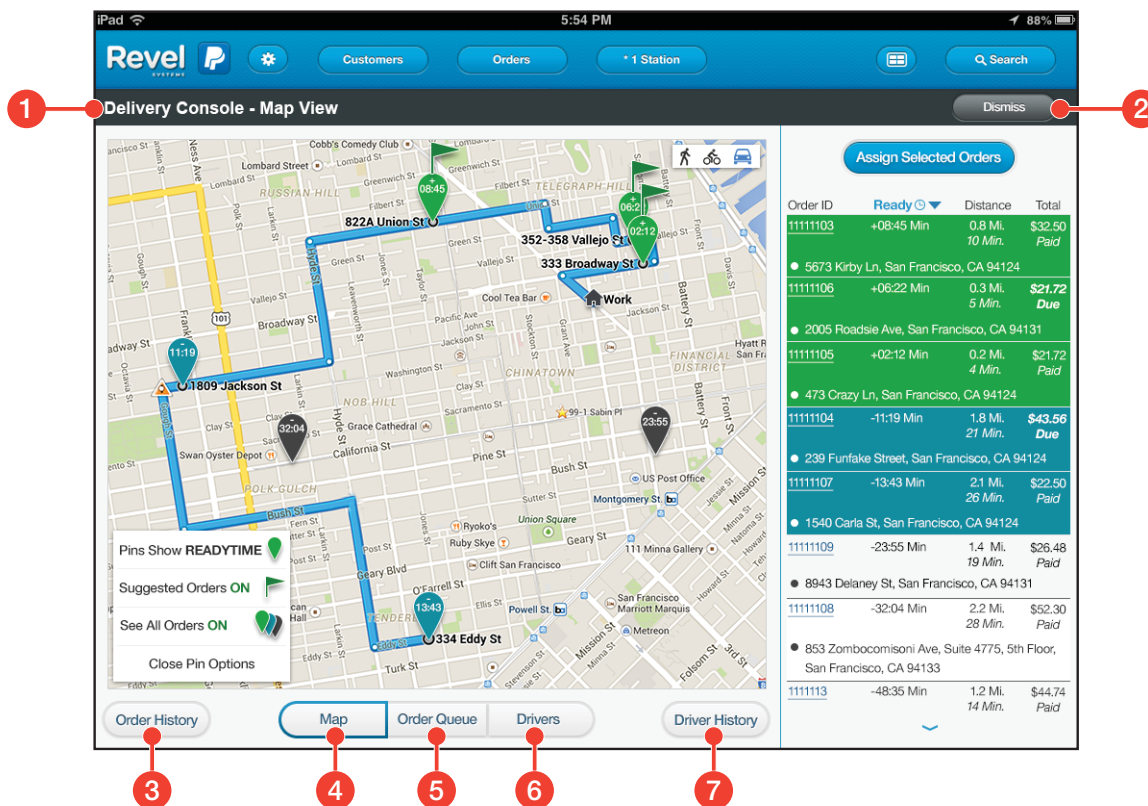


NOTE: User permissions determine what is displayed on Delivery Console. A manager can control all aspects of the delivery process. They can assign a driver to an order, adjust tips, check-in drivers, end the driver's shift, adjust mileage, and cash in/out for an employee. For more information see "[Role and Permissions](#)" on page 7.

Delivery Console Overview

The employee's role determines what is displayed on the screen. The Manager can view all drivers and all orders (assigned and unassigned). A Driver can only view their assigned orders and any orders that have not been assigned.

NOTE: Long tap on any pin or order to open the order details page.



- 1 Indicates the view that is currently displayed on the Delivery Console. Views include Order History, Map, Order Queue, Drivers, and Driver History.
- 2 Tap to close the Delivery Console and open the iPad POS screen.
- 3 Tap to open the Order History view.
- 4 Tap to open the Map view.
- 5 Tap to open the Order Queue view.
- 6 Tap to open the Driver view.
- 7 Tap to open the Driver History view.

Order History Overview

The Order History screen displays the order details including if the order is assigned to a driver, the status of the order, and if the order is open or closed.

NOTE: The Manager can view all orders (assigned and unassigned). A Driver can only view their assigned orders.

Delivery Console - Order History						
Search Dismiss						
Order ID	Status	Employee	Customer	Driver Status	Total	Due
11111106	Closed	Jake M	John DiMaggio	Enroute Est. Del: 6:12 PM	\$22.56	\$0.00
11111105	Closed	Jack D	William Gottfried	Unassigned	\$15.65	\$0.00
				Tender Type	CC#/Gift #	Payment Amt.
				Gift Card	1234567890	\$10.00
				Cash	-----	\$5.65
				Tip Amt.		\$4.00
11111104	Open	Ralph C	Jenny Ma	Unassigned	\$28.71	\$28.71
11111103	Open	Jack D	Kelly Johans	Unassigned	\$18.73	\$18.73
11111107	Open	Ralph C	Max Thoro	Assigned Est. Del: 4:42 PM	\$25.45	\$0.00

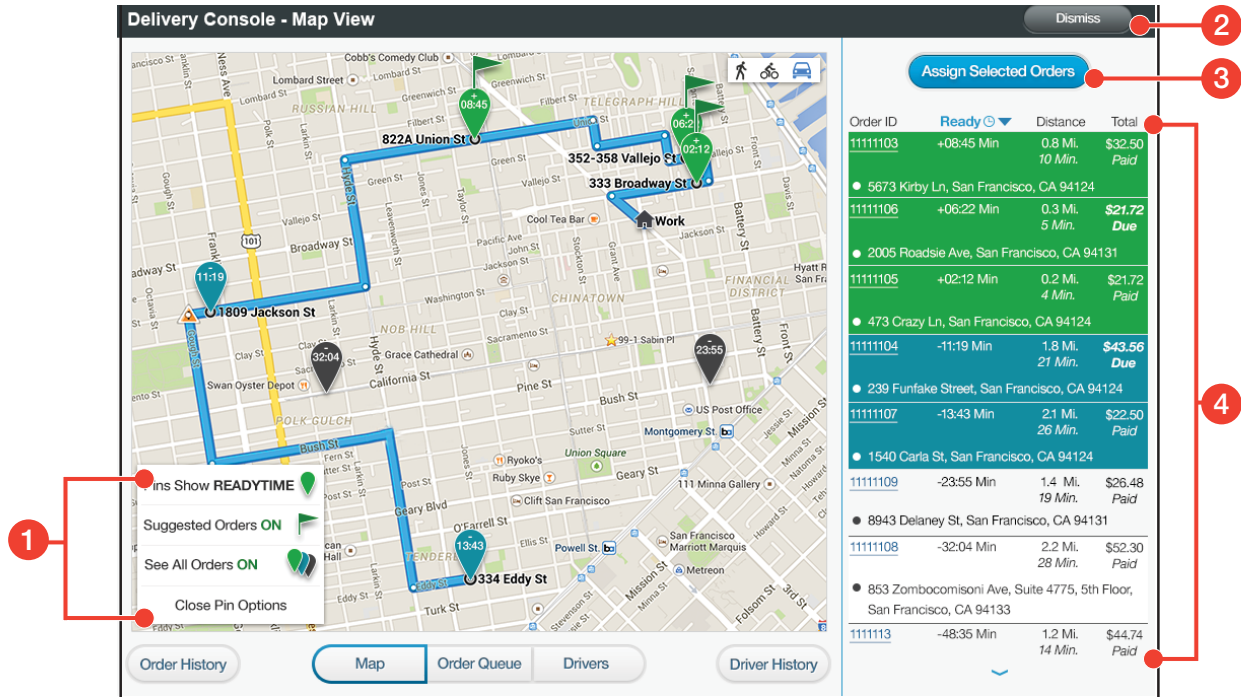
- 1 Tap to expand and view the payment details.
- 2 Tap to close the expanded view of the payment details.
- 3 Displays the list of all order numbers. Tap on an order number to view the order details.
- 4 Displays if an order is open or closed.
- 5 The name of the driver assigned to deliver the order.
- 6 The name of the customer assigned to the order.
- 7 Displays if an order has been assigned to a driver and if the order has been delivered.
- 8 The total amount of the order.
- 9 Displays the amount due when the order is delivered.
- 10 Displays the payment details.

Map Overview

The Map View displays the details of all unassigned orders. Details include delivery location, when the orders will be ready for delivery, and the best route.

Color pins indicate the state of the order. A green pin indicates the order is ready for delivery, a blue pin indicates the order is almost ready for delivery, and a black pin indicates that the order is not ready.

NOTE: The Manager can view all drivers and all orders (assigned and unassigned). A Driver can only view their assigned orders and any orders that have not been assigned.



- 1 Tap to open or close the pin option display. The options define how the pins will appear on the Map View. Settings include:
 - Pins Show - Pins details can be displayed by Distance or Ready Time.
 - Suggested Orders - Turns the suggested order functions On or Off.
 - See All Orders - Turns the Display all orders On or Off.
- 2 Tap to close the Delivery Console and open the iPad POS screen.
- 3 Tap the button to assign all orders highlighted in green to a driver for delivery.
- 4 A quick overview of the status of all orders. Green highlighted orders are ready for delivery, blue highlighted orders are almost ready, and white orders are on hold.

Sending an Order to Delivery

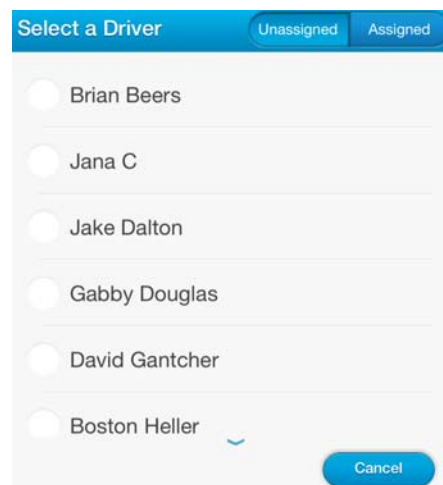
1. Log on to the iPad POS.
2. Select the required category, subcategory and product. Select product attributes or modifiers, if applicable. The POS adds the product to the Orders screen.
3. Tap the Dining option button, the Dining pop-up menu opens.
4. Select Delivery and then tap OK. The Manage Customers screen opens.
5. Select the customer's name or tap New Customer to add the customer.
6. Tap **Add to Order** and then do one of following:
 - Tap Send order to send the order to the kitchen, if applicable.
 - Tap Pay to take payment for the order
 - Tap Hold Order, if the customer pays for the order upon the delivery.

Assigning a Delivery to a Driver

1. Log in to the POS.
2. Tap Orders, the Orders drop-down menu opens.
3. Select Delivery Management from the drop-down menu. The Delivery Console is displayed on the screen.
4. Tap on an order or orders located on right-hand side of the screen.
5. Tap Assign Selected Orders. The Select a Driver pop-up window opens.

NOTE: By default, the POS shows the list of the drivers who have no assigned orders. Tap Assigned to see the list of the drivers who have assigned orders.

6. Select a driver from the list.



Order Queue Overview

The Order Queue displays all open orders and their delivery details. Orders can also be assigned to drivers from this display.

NOTE: The Manager can view all drivers and all orders (assigned and unassigned). A Driver can only view their assigned orders and any orders that have not been assigned.

The screenshot shows the 'Delivery Console - Orders Queue' interface. It features a table of orders with columns for Order ID, Time Since Ordered, Address, and Status. The order with ID 11111110 is selected and highlighted in blue. To the right of the table, there is a map showing the delivery route and a section for Order Information, including customer name, phone number, address, driver assigned, and estimated delivery time. At the bottom, there are buttons for 'Order History', 'Map', 'Order Queue', 'Drivers', 'Driver History', and 'Send Order & Route Info'. Red callout numbers 1 through 8 point to specific elements: 1 points to the selected order row, 2 points to the Order ID, 3 points to the Time Since Ordered, 4 points to the Address, 5 points to the Status, 6 points to the 'Unassign' button, 7 points to the Order Information section, and 8 points to the 'Route Directions' section.

Order ID	Time Since Ordered	Address	Status
11111106	20 Min	2005 Roadsie Ave, San Francisco 94124	Ready
11111105	28 Min	473 Crazy Ln, San Francisco 94124	Ready
11111104	33 Min	8943 Delaney St, San Francisco 94124	Ready
11111103	40 Min	5673 Kirby Ln, SF 94124	Ready
11111107	11 Min	1540 Carla St, San Francisco 94124	Cooking
11111108	17 Min	853 Zombocomisoni Ave, Suite 4775, Floor 5, San Francisco, CA 94133	Cooking
11111109	13 Min	239 Funfake St, SF 94131	Cooking
11111110	46 Min	8245 Jonos St, Sf 94133	Assigned
11111115	38 Min	853 Trieste St, sf 94131	Enroute
11111113	29 Min	1337 Dufaq St, SF 94131	Enroute

Order Information

Order ID# 11111110

Unassign

Cust. Name: John DiMaggio

Phone #: 262.558.2347

Address: 8245 Jonos St, Sf 94133

Driver Assigned: Jake M.

Est. Delivery Time: 7:13 PM

Total Route Time: 54 Min (16 Miles)


Route Directions

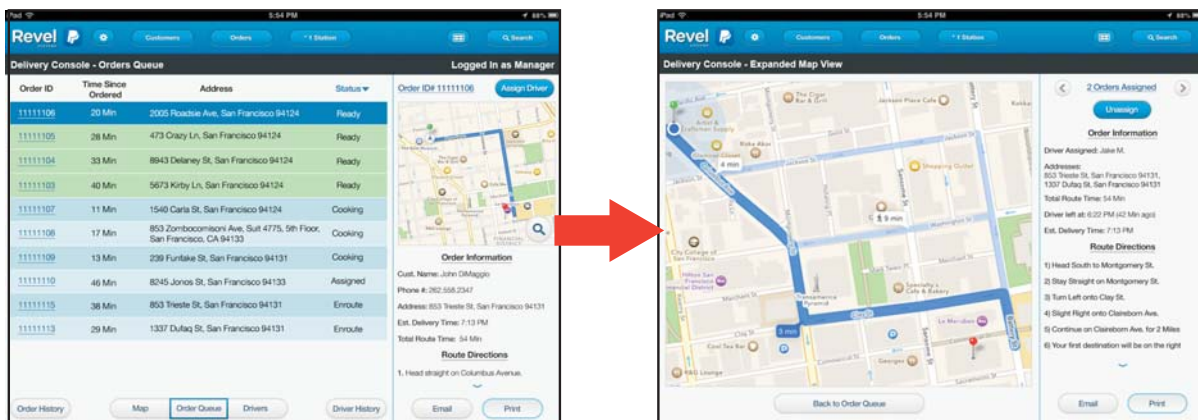
- 1 Highlights a selected order and displays the order information on the right side of the screen.
- 2 The identifying number automatically assigned to the order by the iPad POS.
- 3 The time, in minutes, since the order was entered in the iPad POS.
- 4 The delivery address for the order.
- 5 The status of the order.
- 6 Tap to quickly assign a selected order to a driver.
- 7 Details of the order selected on the left side of the screen
- 8 Detailed delivery route instructions for the selected order.

Transferring Ownership of Deliveries

1. Log in to the POS.
2. Tap Orders, the Orders drop-down menu opens.
3. Select Delivery Management from the drop-down menu. The Delivery Console is displayed on the screen.
4. Tap the Order Queue button, the Order Queue screen opens.
5. Tap on an order or orders located on the left side of the screen.
6. Tap the Unassign button located on the right side of the screen, the Reassign Driver pop-up screen opens.
7. Select a driver from the list and then tap OK.

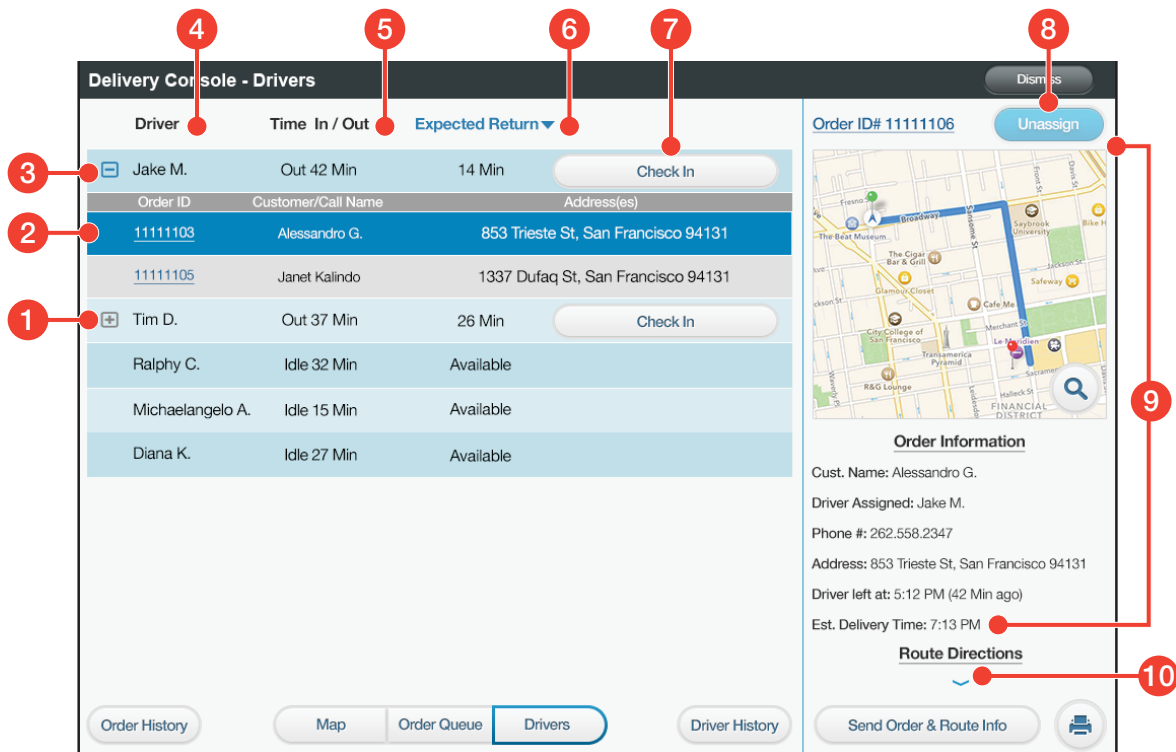
Expanding the Map View

1. Log in to the POS.
2. Tap Orders, the Orders drop-down menu opens.
3. Select Delivery Management from the drop-down menu. The Delivery Console is displayed on the screen.
4. Tap the Order Queue button, the Order Queue screen opens.
5. Tap on an order located on the left side of the screen.
6. Tap the  button, the map view expands.



Drivers Overview

The Drivers screen displays the driver's orders, status, and directions. The Driver Manager can view all drivers and all assigned and unassigned orders. A Driver can only view their assigned orders and any order that has not been assigned to a driver.



- 1 Displays a list of all orders assigned to the driver.
- 2 The identifying number automatically assigned to the order by the iPad POS
- 3 Closes the list of deliveries assigned to the driver.
- 4 The name of delivery drivers.
- 5 The number of minutes since the driver Checked In or Checked Out.
- 6 The time the driver should be available for more deliveries.
- 7 Press this to check the driver in or out from a delivery.
- 8 Unassigns a delivery from a driver so that it can be assigned to a different driver.
- 9 Details of the order selected on the left side of the screen
- 10 Detailed delivery route instructions for the selected order.

Driver History Overview

Driver History is a list of all drivers and their completed orders.

3

4

5

6

7

8

9

10

11

12

13

Dismiss

Driver

Total Payments

Order Totals

2

+

Jake M.

\$15.62

\$80.98

End Shift

Order ID

Customer

Checked Out

Checked In

Duration Out

Total

Order Status

11111116

Joe S.

12:21 PM

36 Min

\$15.36

Open / Unpaid

Tender Type

CC#/Gift #

Payment Amt.

Tip Amt.

\$0.00

11111112

Rosa Meletto

10:45 AM

11:58 AM

1 Hr 13 Min

\$21.44

Open / Paid

Tender Type

CC#/Gift #

Payment Amt.

Tip Amt.

Cash

\$21.44

3.00

11111106

John DiMaggio

9:44 AM

10:27 AM

43 Min

\$44.18

Closed / Paid

Tender Type

CC#/Gift #

Payment Amt.

Tip Amt.

Gift Card

1234567890

\$13.71

Visa

5574

\$30.47

1

+

Tim D.

\$121.65

\$150.22

End Shift

+

Ralph C.

\$43.50

\$43.50

End Shift

+

Michaelangelo A.

\$22.65

\$64.18

End Shift

+

Diana K.

\$33.54

\$42.73

End Shift

Order History

Map

Order Queue

Drivers

Driver History

Till Mgmt

- 1 Tap to expand and displays a list of all orders assigned to the driver.
- 2 Closes the expanded list of deliveries assigned to the driver.
- 3 The name of the delivery driver.
- 4 The identifying number automatically assigned to the order by the iPad POS.
- 5 The customer name associated to an order number.
- 6 The total payments the driver has collected.
- 7 The total amount the driver has left to collect.
- 8 The time the driver checked out.
- 9 The time the driver checked in.
- 10 The current status of the order.
- 11 The total payment for the order.
- 12 Tap to start the driver's end-shift process. For more information see "[End-of-Shift Process](#)" on page 21.
- 13 The status of the order after the driver clocked out.

Driver Procedures

Shift Start

To start a shift the driver must Clock In and then Login to the POS.

Clocking In

1. Tap Clock In located on the lower, right side of the Login screen. The PIN pop-up screen opens.
2. Enter the employee PIN.
3. Tap OK, the Confirm pop-up opens.
4. Tap Yes, the Info pop-up opens “Successfully Clocked In”.
5. Tap OK.



Logging In

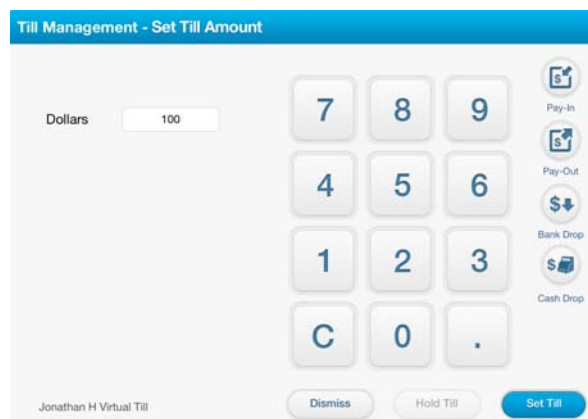
1. Enter the employee PIN.
2. Tap the Login button, the driver will automatically be logged in to the Delivery Management screen.

Virtual Tills

Employees who keep cash on themselves, for example a delivery driver, may close orders without placing money in the till. A virtual till is tied to an employee and tracks all the employee's activity. Employees with the Delivery role are able to set the starting till amount, set pay-ins/pay-outs, complete bank drops, and perform cash drops into a physical till.

Setting the Till Amount

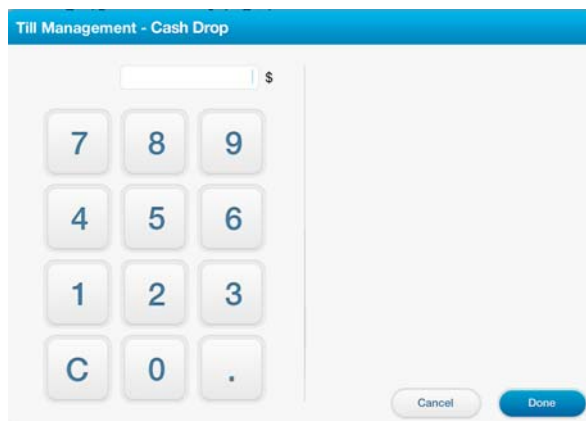
1. Log in to the POS as a driver.
2. Tap the Driver History button, the Driver History view is displayed on the screen.
3. Tap the Till Mgmt button, the Till Management pop-up opens.
4. Tap inside the Dollar field.
5. Enter the amount of the cash in the Dollars field.
6. Tap the Set Till button.



Performing a Cash Drop

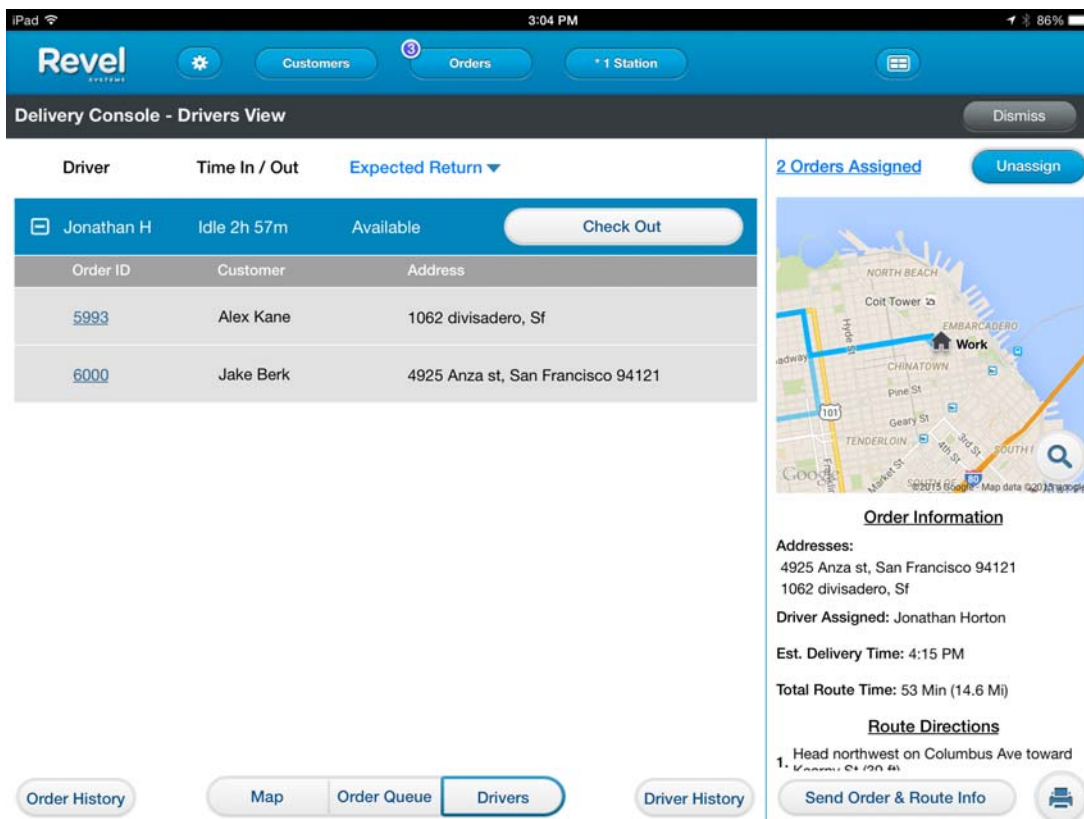
NOTE: A cash drop is money taken out of a virtual till and placed into a physical till. The cash drop reports as a payout on the virtual till and a pay-in on the physical till.

1. Log in to the POS as a driver.
2. Tap the Driver History button, the Driver History view is displayed on the screen.
3. Tap the Till Mgmt button, the Till Management pop-up opens.
4. Enter the amount of the cash drop in the Dollars field.
5. Tap the Done button.



Checking Out the Delivery

1. Log in to the POS as a driver.
2. Tap the Drivers button, the Driver view is displayed on the screen.
3. Select a delivery/deliverys and then tap the Check Out button.

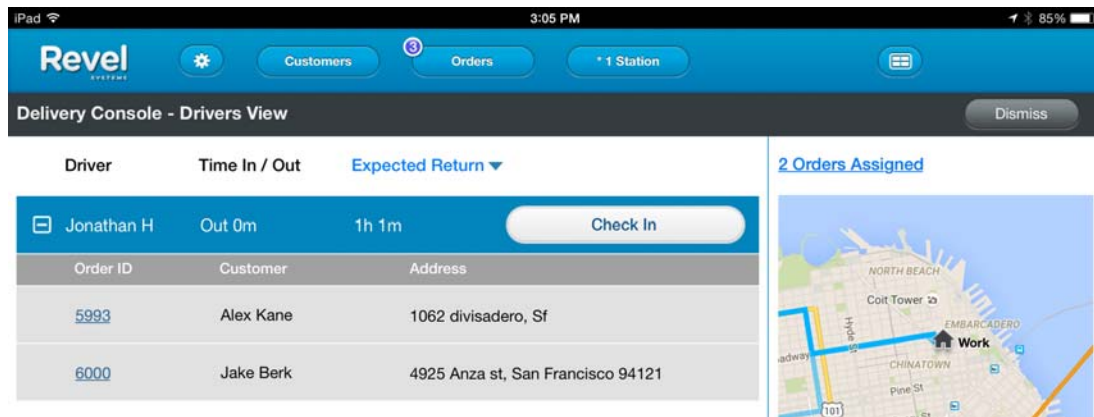


Taking Payment and Adding a Tip

1. Log in to the POS as a driver.
2. Tap the Driver button, the Driver view is displayed on the screen.
3. Long-tap on an order, the Order Detail screen opens.
4. Tap Pay and proceed with the payment.
5. Tap Done.

Checking In the Delivery

1. Log in to the POS as a driver.
2. Tap the Driver button, the Driver view is displayed on the screen.



3. Tap the Check In button, the “Close Open Orders?” pop-up opens. Select one of the following:
 - Click OK to close open orders.
 - Select order number(s) and then select Close unpaid orders to cash. Click OK.
4. Enter the mileage value in the Enter Total Mileage of Delivery pop-up.

NOTE: Default value of mileage is the value Google Maps service determined for the total trip distance.

5. Tap OK.

Enter Total Mileage of Delivery

Please confirm your Mileage

14.6 Miles 14.6

If correct, please tap OK.
If incorrect, please enter the correct mileage.

Cancel OK

Order #	Order Total	Amt. Due
5993	\$17.40	\$17.40
6000	\$18.49	\$18.49

☒ Close unpaid orders to Cash?

Select All Cancel OK

End-of-Shift Process

To end a shift a delivery driver must press the End Shift button and complete the procedures that appear on the screen. This process navigates the driver through the end-of-shift process.

The procedures required to end the shift include:

1. Submit payment for all open/unpaid orders (this includes a close to cash functionality).
2. Enter tip amount for all outstanding orders which require tip entry.
3. Close the virtual till.
4. Print a Sales Summary report for the driver.
5. Print a clock-in and a clock-out receipt for the employee.
6. Manager and driver both sign the clock-out receipt.

SYSTEM CONFIGURATION SUPPORT

Phone: 415.744.1433 extension 2

Website: <http://support.revelsystems.com>