

# Revel iPad Point of Sale

## Loyalty and Rewards User Guide

March 11, 2016





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# Introduction

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Revel Systems offers businesses the ability to customize their loyalty and rewards programs. This feature gives businesses the power to create engaging programs that generate customer loyalty and increase sales.

The loyalty reward structure includes:

- Create rewards with different point redemption values
- Use Revel Systems' full discounting options with loyalty rewards
- Multiple rewards redeemed per purchase
- Loyalty tiers that control how customers accrue points
- Accrue points based on sales, items, visits or all three

## The Revel Reward Program

**NOTE:** This document provides information about the Revel Reward Program. The loyalty program is charged at a flat rate with no hidden fees. Please contact the Revel Support Team to receive information about third-party reward programs.

There are three Revel reward point types; visit, purchase, and item specific. A customer receives one Visit reward point every time they make a purchase at the establishment. Purchase value reward points are based on the total amount of the customer's purchase. Item reward points are based on specific products the customer purchases.

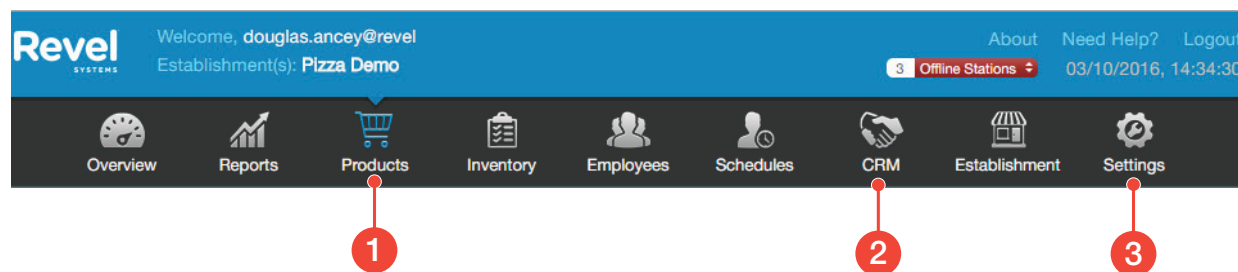
# Management Console

## Getting Started

**NOTE:** The Loyalty and Rewards settings in the Management Console must be configured to enable the Loyalty and Reward screen on the iPad POS. If you do not have loyalty, please contact your sales executive to purchase our loyalty platform.

There are three Management Console setting pages that can be configured to enable and customize loyalty and rewards; the Settings page, the CRM page, and the Products page. Use the Settings page to configure reward cards and the behavior of reward programs. Use the Products page to configure item purchase points and loyalty rewards discounts. Use the CRM page to build loyalty tiers which control how customers earn rewards.


## Overview



- 1** Products Icon – Top level product settings page for the POS Management Console. Contains all product settings including discounts and all other information relevant to the establishment's products. A blue icon indicates the icon is selected.
- 2** CRM Icon – Top level settings page for the Customer Relationship Manager. Maintains customer information including customer loyalty information. A blue icon indicates the icon is selected.
- 3** Settings Icon – Top level settings page for the Management Console. Customizes all high level POS settings including gift rewards, password control, receipts, payments, and customer information. A blue icon indicates the icon is selected.

# Settings Page


## Configuring Loyalty Settings

1. Log in to the Management Console.
2. Click the  icon, the Settings page opens.
3. Click on “Gift, Rewards and Admin Cards” located on the left side of the screen. The Gift, Rewards and Admin Cards Settings page opens.
4. Scroll down the page to the Loyalty section.
5. Select the settings to configure the loyalty program. Loyalty program settings include:
  - a) Print Reward Balance on Receipt – Prints the remaining points on the receipt.
  - b) Print Points Needed to Redeem Next Reward on Receipt – Prints the required points needed before the next level reward can be used.
  - c) Minimum Purchase Needed to Accrue Points – Sets the minimum purchase amount required before points are accrued.
  - d) Reward Prompt Method – Determines how the cashier will interact with the loyalty program on the POS.
    - By Prompt (default setting) – The POS Prompts the cashier to use rewards.
    - By User Selection – The POS Requires the cashier to press the rewards button to prompt the user to input a reward card.
  - e) Allow Multiple Reward Redemptions per Order – Allows for multiple rewards to be redeemed per order.

**NOTE:** This is only applicable for order level rewards.

- f) Display on POS – Only displays the redemptions and point values on the POS.
  - g) Display on CDS – Displays the redemption and point values on the POS and customer display screen.
  - h) Combine Rewards into One Total – Selecting this setting enables customers to have one overall rewards point total, instead of separate rewards for each reward method (Visits, Purchase Value, or Item Points). Once the rewards points are pooled together into one total, they become purchase rewards.
  - i) Default to Manual Reward Card Input – Select this setting if reward cards are only entered manually.
6. Scroll to the top of the page. Click Save located in the upper right corner to save the settings.

## Configure Customer Info Settings

1. Click the  icon, the Settings page opens.
2. Click on “Customer Info” located on the left side of the screen. The Customer Info page opens.
3. Select customer settings as required:


- a) Prompt for Customer – If enabled, the user will be prompted to assign a customer to the order when the order is opened. This prompt may be moved to happen on pressing pay and the customer may be required.
- b) Automate reward card usage – If enabled, and the customer associated with the order has a linked reward card, a prompt will ask the customer if they want to redeem rewards.

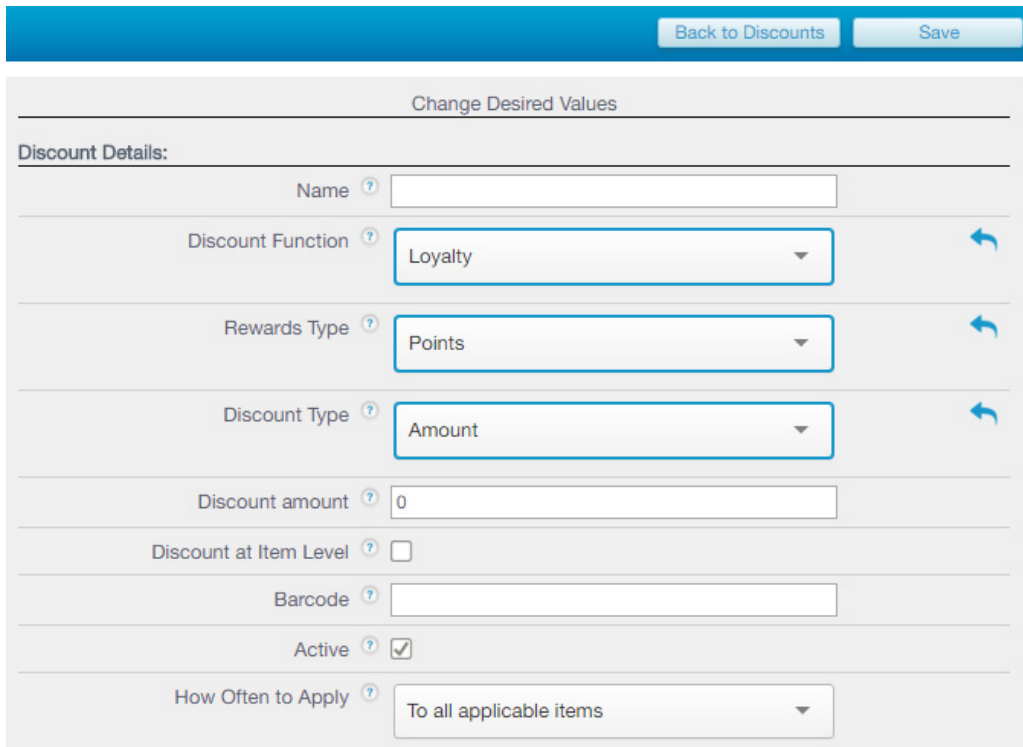
**NOTE:** The “Automate reward card usage” setting must be selected to configure a seamless, integrated customer loyalty program.

- 4. Scroll to the top of the page. Click Save located in the upper right corner to save the settings

# Products Page

## Adding a New Loyalty Discount.


1. Click the  icon, the Products page opens.
2. Click on Discounts located on the left side of the screen. The Discounts page opens.
3. Click the **+ Add New Discount** button located in right corner, the Discount Details page opens.
4. Enter the name of discount in the Name field.
5. Select Loyalty from the Discount Function drop-down menu.
6. Select which loyalty program will use this discount from the Rewards Type drop-down menu.
7. Select the reward type from the Discount Type drop-down menu. Selections include:
  - Amount – The item or order is discounted by a constant value.
  - Percent – The item or order is discounted by a percentage.
  - Re-Price – A new price is applied to the item.
  - Alt-Price – The alternative price is used. Configured on the item's Settings page.
8. Enter the amount of the discount in the Discount amount field.
9. Input the amount of points needed for reward redemption.
10. Click Save locate in upper-right corner to save the loyalty discount.







Change Desired Values



Back to Discounts Save


Discount Details:


Name 


Discount Function  Loyalty 


Rewards Type  Points 


Discount Type  Amount 

Discount amount  0

Discount at Item Level 


Barcode 

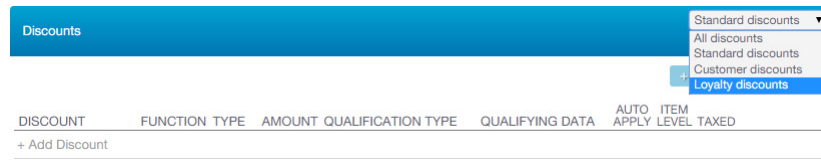
Active 


How Often to Apply  To all applicable items



## Revising a Defined Loyalty Discount

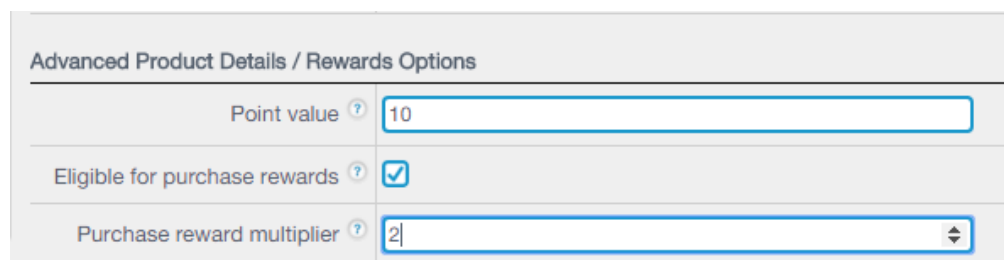
1. Click the  icon, the Products page opens.
2. Click Discounts located on the left side of the screen. The Discounts page opens.
3. Select Loyalty Discount from the discount drop-down menu.





4. Click the  icon, the Discount Details page opens.
5. Make changes to the settings as required.
6. Click Save to save the changes.

## Rewards in Product Details

Users can define reward options for specific products on the Products > Details page for that product. The Reward Options can be found and configured under Advanced Product Details.

A screenshot of a form titled 'Advanced Product Details / Rewards Options'. The form has three rows of input fields. The first row is 'Point value' with a text input field containing the number '10'. The second row is 'Eligible for purchase rewards' with a checked checkbox. The third row is 'Purchase reward multiplier' with a text input field containing the number '2' and a small up/down arrow icon on the right side.

To configure reward options for specific products:

1. Click the  icon, the Products page opens.
2. After expanding the Product Category and Subcategory, Click the  icon to the right of the desired product to bring up the Product Details page for that product.
3. Expand the Advanced Product Details and select the Rewards Options check box to display the configurable reward options.
4. In the “Point value” field, enter the amount of rewards points a customer will earn by purchasing the product. These are item points.
5. Select the “Eligible for purchase rewards” check box to allow customers to accrue purchase rewards points for the product.
6. Enter the desired multiplier in the “Purchase reward multiplier” field. Products with a multiplier of 1 will accrue purchase points normally. A multiplier of 2 will double the purchase rewards points earned when purchasing this product.

# CRM (Customer Relationship Management) Page



The CRM page controls how customers earn rewards. Use the CRM to create loyalty tiers. These features enhance a business's ability to setup attractive reward programs that engage customers and motivate them to come back.

## Loyalty Tiers

Loyalty Tiers are used to customize reward programs for specific customers or customer groups. Tiers for accrual and specific loyalty discounts can include specific loyalty program rules. For example, a tier can be configured so that an employee of Company A automatically receives double the rewards points when they make a purchase at a client's establishment.

**NOTE:** Loyalty rewards linked to a tier have a higher priority over unlinked rewards. Loyalty rewards that are linked to a tier are only available to members of that tier.

### Creating a Loyalty Tier

1. Click the  icon, the CRM page opens.
2. Click Loyalty Tiers located on the left side of the screen, the Loyalty Tiers page opens.
3. Click the  button located in right corner, the Loyalty Tier Details page opens.
4. Enter the name of the tier in the Name field.
5. Check the Active box to activate the loyalty tier.
6. Enter the number of the first card for the tier in the "Reward Card Bin range from" field. A bin range is the first digits of the customer's loyalty number
7. Enter the number of the last card for the tier in the "Reward Card Bin range to" field.
8. In the Included Discounts field, add any loyalty discount tied to this tier. Start typing the name of the configured discount in the field, and the system will auto-populate the field.
9. Input any required accrual rules for the loyalty tier.
  - a) Max Points Per Transaction – Sets the maximum number of reward points a customer can accrue with each transaction.
  - b) Max Transactions per period – Sets the maximum number of transactions, which accrue points, that a customer can make in a given time period.
  - c) Max Transactions period – Defines the time period for the Max Transactions per period field. Users can select a daily or weekly time period.
  - d) Max Points per period – Sets the maximum number of points that a customer can accrue in a given time period.
  - e) Max Points period – Defines the time period for the Max Points per period field. Users can select a daily or weekly time period.
10. Click Save to save the changes.

Loyalty Tier >
Back
Save

Select Desired Settings

Search...

- Basic Details
  - Name
  - Active
  - Reward Card Bin range from
  - Reward Card Bin range to
  - Awarding
  - Redemption
  - Balance inquiry
  - Award Limit
  - Included Discounts
- Accrual Rules
  - Max Points Per Transaction
  - Max Transactions per period
  - Max Transactions period
  - Max Points per period
  - Max Points period
- Loyalty Rules
  - Rules

Change Desired Values

**Basic Details:**

Name

Active

Reward Card Bin range from

Reward Card Bin range to

Awarding

Redemption

Balance inquiry

Award Limit

Included Discounts

**Accrual Rules:**

Max Points Per Transaction


Max Transactions per period

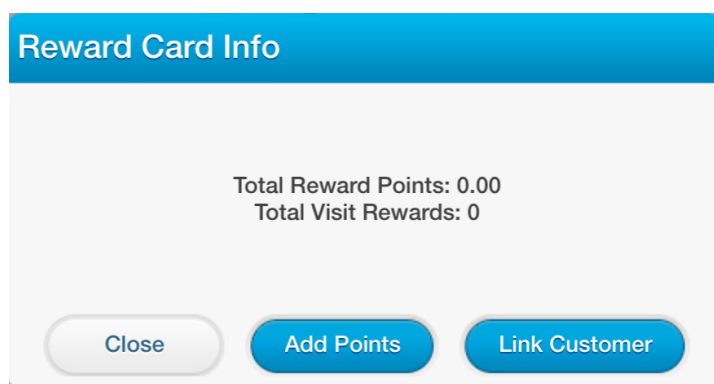
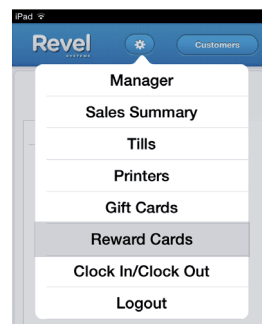
Max Transactions period

Max Points per period

Max Points period


## Creating a New Reward Card

1. Log in to the iPad POS.
2. Tap the  icon, the Settings drop-down menu opens.
3. Select Reward Cards from the drop-down menu. The Actions pop-up menu opens.
4. Select the Create Reward Card option and tap OK. The Scan or Swipe the Reward Card pop-up opens.
5. Perform one of the following actions:
  - Swipe a reward card using the card swipe, the Reward Card Info window opens.
  - Tap Manual and enter the reward card number in the Enter Card Number pop-up. The Reward Card Info window opens.

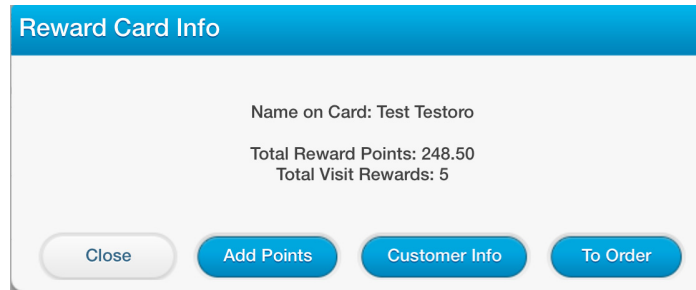



6. Tap Link Customer and then select one of the following:
  - Link an existing customer to the card. Select a customer from the list and then tap the Link Customer button.
  - Link a new customer to the card. Tap New Customer, the Add a New Customer pop-up window opens. Fill in the fields with the customer's information and then tap Save.
7. Tap To Order to attach the customer to the order.

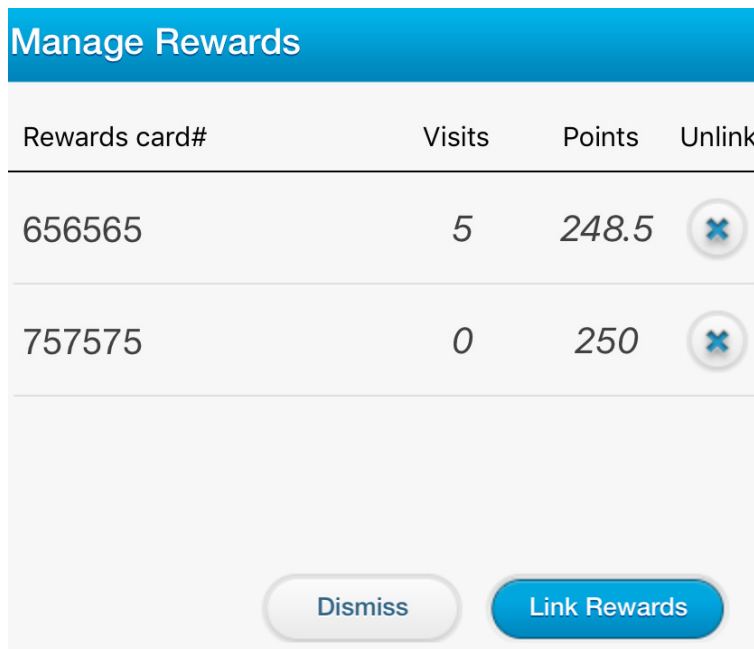
## Manage Reward Cards

1. Tap the  icon, the Settings drop-down menu opens.
2. Select Reward Cards from the drop-down menu. The Actions pop-up menu opens.
3. Select the Manage Reward Card option and tap OK. The Scan or Swipe the Reward Card pop-up opens.


4. Perform one of the following actions:
  - Swipe a reward card using the card swipe, the Reward Card Info window opens.
  - Tap Manual and enter the reward card number in the Enter Card Number pop-up. The Reward Card Info window opens.

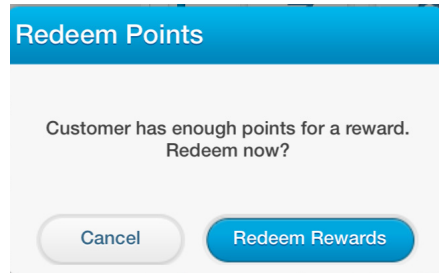


5. Perform one of the following actions:
  - To add points to the card, tap the Add Points button, and enter the desired amount in the Enter Amount pop-up window.
  - To unlink a rewards card from a customer, tap the Customer Info button to access the Customer Info window. Then tap the  icon to access the Manage Rewards screen. Tap the X icon in the Unlink column of a card to unlink it from the customer. Users can also link more rewards cards to the customer from this screen.




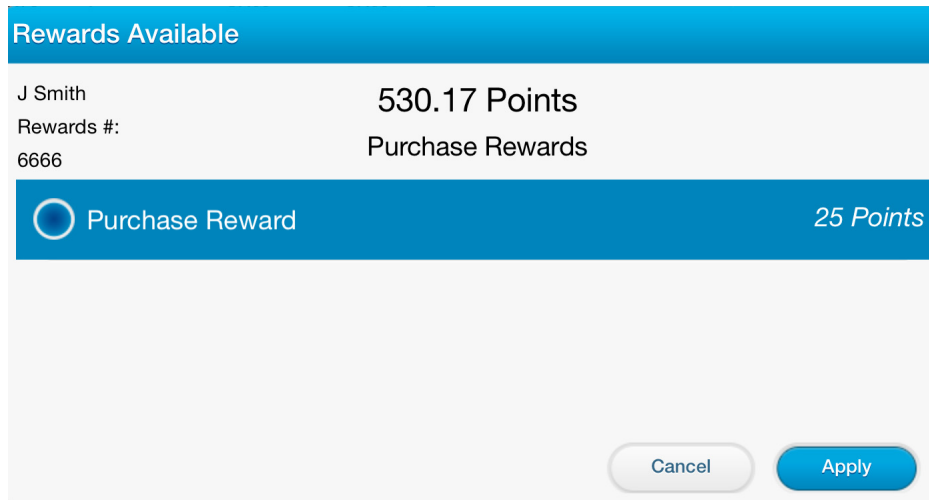
## Using Rewards Cards via Customers



1. Add the products to the Orders screen.
2. Add the customer with a linked reward card to the order by pressing the “Customers” button, selecting that customer, and tapping the “Add to Order” option. This will automatically attach their reward card to the order.
3. Tap the  icon, the Payment screen opens the POS displays the Redeem Points screen automatically.




**NOTE:** The Redeem Points screen only opens if the card has enough points to redeem. If the customer does not have enough points to redeem a reward, a message stating no rewards are available and the current point total will be displayed.

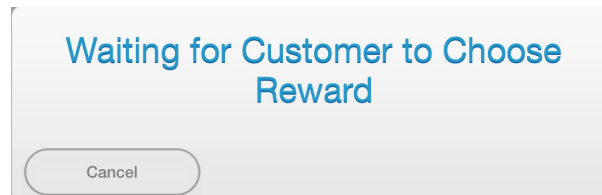
4. Tap the  button, the Rewards Available pop-up window opens
5. Select the desired reward.



6. Tap the  button. The POS displays the Reward Point Balance.
7. Tap the  button. The Order Screen shows information about the applied rewards.



## Using Rewards Cards via Customer Display (CDS)

1. Add the products to the Orders screen. The items will appear on the customer facing display.
2. The customer then taps the rewards button, located in the upper right-hand corner of the CDS, and is taken to the Reward Input screen to enter their rewards number or phone number.
3. Once entered, if the rewards number is linked to a customer in the system, the POS will prompt to add that customer to the order.
4. Tap the  icon, the Payment screen opens and the POS will display a Waiting for Customer to Choose Reward screen.



5. The customer will then use the CDS to redeem their points, and will be taken back to the CDS order screen, which now displays their updated rewards points in the upper right-hand corner.

**Congratulations, you have 54.00 reward points**  
**Congratulations, you have 2 Visit Rewards**

6. the Rewards Available pop-up window opens on the POS
7. Select the desired reward.
8. Tap the  button. The POS displays the Reward Point Balance.
9. Tap the  button. The Order Screen shows information about the applied rewards. Take payment as usual and tap "Done". The POS and CDS display the reward point balance.

# Thank You!

**Amount Paid: \$50.00**

**Change: \$24.15**




Visits Rewards Earned: 1

Current Visits Rewards: 3

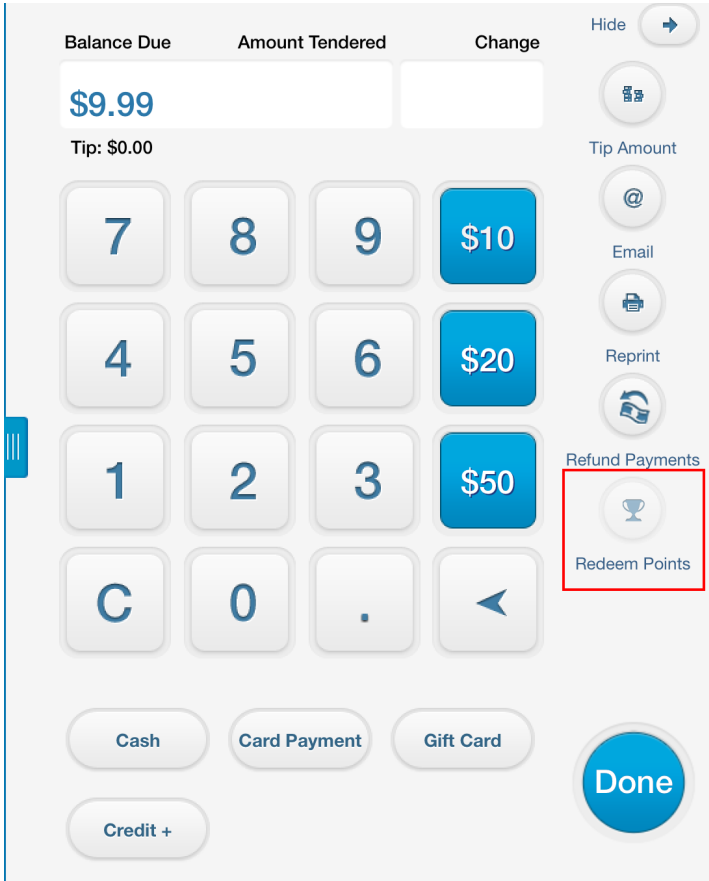
Reward Points Earned: 23.5

Current Reward Points: 77.5

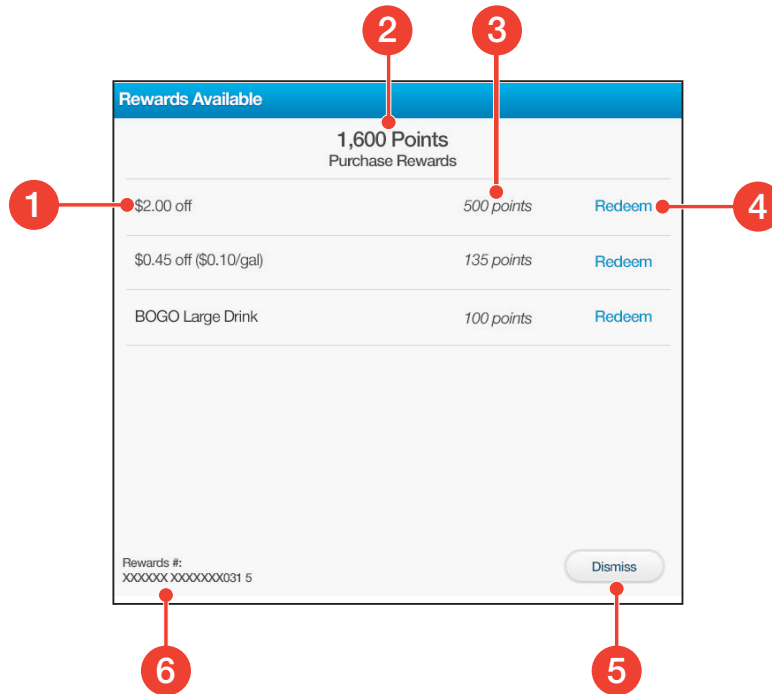
## Using Rewards Cards via Redeem Rewards Button

1. Add the products to the Orders screen.
2. Tap the  icon, the Payment screen opens.
3. Tap the Redeem Rewards icon, (if no points are available the icon will be grayed out and not available for selection) the Scan or Swipe the Reward Card pop-up opens.
4. Perform one of the following actions:
  - Swipe a reward card using the card swipe, the Reward Available window opens.
  - Tap “Manual” and enter the reward card number, the Reward Available window opens.
5. Select the desired reward.
6. Tap the  button. The POS displays the Reward Point Balance.
7. Tap the  button. The Order Screen shows information about the applied rewards.
8. Take payment as usual and tap “Done”. The POS display the reward point balance.





## Rewards Available Overview



- 1 Loyalty Reward – Displays the name of the loyalty discount.
- 2 Points – Displays the number of reward points the customer has available for use.
- 3 Point Cost– Displays the point cost of the loyalty reward.
- 4 Redeem – Tap to select and redeem points.
- 5 Dismiss – Closes the Rewards Available window.
- 6 Card Number – Displays the customer’s reward card number.

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**SYSTEM CONFIGURATION SUPPORT**

Phone: 415.744.1433 extension 2

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