



Getting Started With Revel Checklist

Congratulations on your new Revel Systems POS and platform!

After receiving your Management Console login information, you are ready to configure the settings for your establishment. Please use this checklist to guide you as you follow step-by-step video tutorials that will walk you through the setup of your POS and platform.

You should fully configure your system before your go-live date. Please note this process typically takes about two weeks from start to finish.

IT IS CRITICAL TO WATCH EACH VIDEO IN THE PLAYLIST IN THE ASSIGNED ORDER TO COMPLETE YOUR ONBOARDING PROCESS PROPERLY.

STEP 1 Start Your Payments Setup

If you aren't using Revel Advantage as your payment processor, you'll need to set up your payments before getting started. Note that setup can take 5-7 business days, so don't delay!

- Payment Gateways & Processors Overview
- Payments Setup Guides

Signed up for Revel Advantage payments during the sales process? We'll handle your payments setup – you're cleared to move on to step 2! You will receive an email from our Payments Operations team once your payments have been setup.

STEP 2 Visit Revel University

Revel University is the curated online onboarding and training video platform available to guide you through setup and installation. You will start with an orientation section, **Before You Begin**, to learn key terms and find out where to get help if you need it.

- Start at revelsystems.com/revel-university.
- Select your business type.
- Follow the onboarding video playlists starting with **Before You Begin**.
- Become familiar with terms like **Management Console, Point of Sale, and Hardware**.
- Learn about additional resources available while onboarding.

□ STEP 3 Meet Your Onboarding Wizards

After the Before You Begin playlist, learn about Revel's in-app wizards by watching the Onboarding Wizards playlist. Become familiar with these wizards, then move on to setup.

□ STEP 4 Employees, Schedules and Payroll

Learn how to add and manage employees in the Management Console. Watch the videos in these playlists for guides about setting up employees, scheduling shifts, and managing employee payroll.

- **Employees** Learn how to add new employees and manage their permissions.
- **Schedules and Payroll** Assign schedules and manage employee time cards.

□ STEP 5 Products

Learn how to manage your products with these playlists. After following the instructions in these sections, you will have products ready in your Management Console.

- Build menu/product list.
- **Taxes:** Covers setting up appropriate tax rates.
- **Combos:** Guides you through setting up combos with your products.
- **CRM:** Learn how to use your customer relationship management tools.
- **Discounts:** Covers the different types of discounts you can use, and how to set up Discounts.
- **Service Fees:** Learn how to add service fees to orders.
- **Inventory:** Learn how to manage your products, create low stock alerts, and more.
- **Ingredients & Recipes:** Get granular and learn how to manage exact product levels.

□ STEP 6 Settings

This section introduces important settings for your Management Console and POS. Walk through these videos to configure important settings.

- Configure **basic settings**.
- Set specific settings tailored to your industry.

□ STEP 7 Reporting

Gain valuable insights about your establishment with reporting. This section covers Revel's robust reporting capabilities available to you.

- Explore standard reports.
- Review industry-specific reports tailored to your needs.

□ STEP 8 Hardware Setup

After your hardware shipment arrives and you're done with your Payments and Management Console setup, it's time to set up iPad Point of Sale and peripherals.

We have hardware setup information available in both video and written form:

- Visit revelsystems.com/revel-university and follow the Hardware Setup playlist.

IMPORTANT: The final and most important test for your credit card processing is to confirm that your batch has settled and been deposited in your bank account. We recommend checking this every day as a part of your financial reporting.

□ STEP 9 POS Training

Learn how to work with your Point of Sale. Learn how to navigate your POS, take orders, process transactions, and close out at the end of the day.

- **Start-of-Day Process:** Learn how to log in, clock in, and set your tills.
- **Customer Management:** Manage customer profiles from your POS.
- **Transactions & Orders:** Take orders and process transactions.
- **End of Day Process:** Close out business at the end of the day.

HELPFUL TIPS

- Now that your new Revel Point of Sale is set up and working, you should spend time preparing and training your employees. Make sure your team is comfortable navigating the POS.
- If you are opening your business for the first time, we recommend a friends and family night to kick things off and give you the opportunity to get comfortable using your system.
- Switching to Revel Systems iPad POS? We recommend starting on a slow day when familiarizing yourself with the system.
- Access Revel University for instructional videos and support.revelsystems.com for answers to any questions.
- If you need additional support with onboarding or are in a time crunch, we offer training and professional services. For more information, call Revel Sales at +1 (415) 744-1433 (Ex. 1).

Take the time to familiarize yourself with the system and remember to utilize the provided support resources to get your Revel POS and platform up and running.

Upon completion of your Management Console, POS, and Hardware setup, your business is powered by Revel Systems. Congratulations!

All the best,
Revel Systems