Urban piper Help Manual

Basics

Your account

As a customer, your Account with UrbanPiper allows you to access all the necessary tools. Your Account is identified using an `email` or a phone `number`.

Once you decide to signup with UrbanPiper, the onboarding team will take care of setting up your account and share with you an administrator access. Using this you can invite other individuals and associate their access with `roles` that grant them the necessary permissions to perform their day-to-day operations.

{% hint style="info" %} Note that every individual, except for the first administrator, will be expected to verify their email or phone number using which they would like to access any of the UrbanPiper tools. {% endhint %}

Restaurant Portal

The single portal through which users can access and manage different applications of the UrbanPiper ecosystem. When working with the Business Manager, you will commonly encounter references to **Atlas** and **Prime.**

Atlas – Business Manager

This is the section which contains all the tools required for you to manage your back-of-house operations.

Prime – Store Manager

This is the section which contains all the tools required for you to manage your front-of-house operations.

{% hint style="info" %} While there is no explicit distinction between **Atlas** and **Prime** when you are navigating within the Business Manager, it helps to keep this distinction in mind when thinking about granting access to users based on their role in a front-of-house or back-of-house capacity. {% endhint %}

To learn more about using the Business Manager, check out our [articles]() about it.

description: >- As you start your journey with UrbanPiper, you will encounter these terms that map to different parts of the Business Manager. Each of these terms maps to a part of your restaurant setup or operation.

Common terms

Brand

This is usually the name of your restaurant. It can also be referred to as **"Concept**". In the scenario where you operate multiple brands/concepts, the Business Manager allows you to set each brand/concept separately.

Location

These correspond to the physical locations of your restaurant. In the case you operate a chain of restaurants, each location would have a corresponding entry in the Business Manager.

When you operate multiple Brands/Concept from your locations, you would be required to associate the locations you have created to each of the Brand/Concept.

In some cases, it helps to refer to locations as `brand-locations` as well, which provides a clear distinction when multiple brands operate from a single location.

Menu

This is the representation of the items that you intend to sell at each of your locations. You have the flexibility to set up your menu in any way that best suits your operations. For eg:

you can have a single menu for each location, a different menu for different locations, different menu for each brand, and many more such permutations.

Platform

A "platform" refers to any system (external to UrbanPiper or within it) where you wish to have a copy of your menu sent to. Most commonly, these platforms denote an online delivery platform. A comprehensive list of these delivery platforms can be seen here.

Point Of Sale (POS)

A POS system refers to the software that is running at your store using which your operators and managers can take care of their in-house and online customers and orders.

What is a Business ID (Biz ID) on UrbanPiper?

The **Business ID (also referred to as Biz ID)** is a **unique identifier** generated for your business account on UrbanPiper. It serves as the **primary reference** for identifying your business across all our internal systems.

🔍 *Why is the Biz ID Important?*

- ✅ **Support Assistance**: Our support team uses the Biz ID to quickly locate and resolve issues related to your business.
- ✅ **Billing & Invoices**: It is referenced in all billing-related documents and communications.
- ✅ **System Integrations**: Used internally for syncing data and managing integrations across platforms.

📍 *Where to Find Your Biz ID?*

You can find your **Biz ID** easily on **Atlas**, UrbanPiper's dashboard:

🖥️ **Top-Right Corner** of your Atlas screen, inside your profile information

Compatible Hardware

Please find below the minimum specification requirements for buying hardware to use UrbanPiper products.

Android Devices

Device types

- Handheld: These are small screens with printer inbuilt
- Phone: these are your everyday smartphone devices with screen sizes ranging from 5.5 inches–7 inches.
- Tablets: these are everyday tablets with screen sizes ranging from 9 inches–13 inches.
- Terminals: These are POS terminals mostly with or without touch screen capability

Handheld

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: Octa-Core
- Screen Size: 5.5 – 7 inch
- Screen Resolution: 1024 × 768 px (XGA)
- OS Version: Android 9+ (Pie & above)

Phone

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: Octa-Core
- Screen Size: 5.5 – 7 inch
- Screen Resolution: 1280 × 720 px (HD)
- OS Version: Android 9+ (Pie & above)

Tablet

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: Octa-Core
- Screen Size: 8 – 11 inch
- Screen Resolution: 1920 × 1080 px (Full HD)
- OS Version: Android 9+ (Pie & above)

Terminal

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: Quad-Core
- Screen Size: 14 – 15 inch
- Screen Resolution: 1024 × 768 px (XGA)
- OS Version: Android 9+ (Pie & above)
  iOS Devices

Devices

Phone

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: A9
- Screen Size: 5.5 – 7 inch
- Screen Resolution: 1920 × 1080 px (Full HD)
- OS Version: Android 12

Tablet

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: A9
- Screen Size: 8 – 11 inch
- Screen Resolution: 2048 × 1536 px (QXGA)
- OS Version: Android 12
- **Devices**
- **Phone**

- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: A9
- Screen Size: 5.5 – 7 inch
- Screen Resolution: 1920 × 1080 px (Full HD)
- OS Version: Android 12
- **Tablet**
- RAM: 3 GB
- Storage: 32 GB (at least 1 GB free)
- CPU: A9
- Screen Size: 8 – 11 inch
- Screen Resolution: 2048 × 1536 px (QXGA)
- OS Version: Android 12

Printers

Specifications (Web Devices Compatibility)

- Windows: Yes
- Mac: Yes
- Android: Yes
- iOS: Yes

Receipt Printer Types (Command Mode)

- ESC/POS → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes
- STAR LINE → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes
- STAR GRAPHIC → Windows: Yes | Mac: Yes | Android: Yes | iOS: No

Receipt Printer Interfaces (Connectivity Methods)

- USB → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes
- Bluetooth → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes
- Ethernet (LAN / WiFi) → Windows: Yes | Mac: Yes | Android: Yes | iOS: No
- Parallel → Windows: Yes | Mac: Yes | Android: No | iOS: No
- Serial → Windows: Yes | Mac: Yes | Android: No | iOS: No

Receipt Printer Sizes

- 2 inch / 58 mm (32 characters per line) → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes
- 3 inch / 80 mm (48 characters per line) → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes
- Custom size → Windows: Yes | Mac: Yes | Android: Yes | iOS: Yes

Laptops

- Browser: Google Chrome (latest)
- Screen Size: 13 inch or above
- Screen Resolution: 1024 × 768 px (XGA)

{% hint style="info" %} **Notes:**

- Any device that adheres to the Minimum Specification Requirements (MSR) will work fine with our products.
- Devices that do not meet these requirements may or may not work properly, and we cannot guarantee their performance.
- If you would like us to test a particular device, please arrange for it to be shipped to our office. We will need 20-25 working days to complete the testing and provide certification.
- If any device meets the MSR but still does not perform well, please raise a concern with us. {% endhint %}

Checking UrbanPiper System Status

If you're facing issues accessing UrbanPiper services, we recommend checking our **System Status Page** for real-time updates:

👉 https://status.urbanpiper.com/

🔎 *What does the status page show?*

Our status page provides up-to-date information on the operational status of all UrbanPiper systems and services, including:

- Integrations (e.g., with POS and delivery platforms)
- Dashboard performance
- API availability
- Scheduled maintenance
- Known incidents or outages

🔄 *Real-Time Updates During Service Disruptions*

In the event of any system degradation or outage, we post real-time updates to keep you informed. You can track:

- Issue identification and investigation
- Ongoing resolution progress
- Final incident resolution and root cause (post-mortem)

📨 *Stay Notified*

You can subscribe to receive status alerts via email or SMS directly from the status page.

{% hint style="info" %} Before reaching out to support, checking this page can quickly clarify whether the issue is part of a known incident.

Still need help? [Contact Support]() {% endhint %}

Contact Us

Need Help? We're Here for You!

If you couldn't find what you were looking for in our Help Center, our Support Team is ready to assist you.

Click the chat icon at the top right corner of your Manager Portal to connect with one of our support agents.

🖥️ Our agents can use screen sharing or call you, if needed, to help resolve your issue quickly.

📧 Prefer email? You can also reach us at **support@urbanpiper.com**.

Partner with Us

At UrbanPiper, we believe in building a powerful ecosystem of integrations to help your business thrive. By partnering with leading technology providers, we act as a central hub that connects your favorite services and platforms, giving you a seamless, unified experience. This means you can manage everything from a single dashboard, simplify your operations, and focus on what you do best.

Our Core Integrations 🔗

We have built a vast network of integrations with the platforms you already know and trust. This ensures that all your critical business functions are working together smoothly.

Categories & Partners

Online Aggregators

- What it means: Manage all your incoming orders from multiple platforms in one place.
- Partners: Zomato, Swiggy, Uber Eats, and more.

POS Systems

- What it means: Connect your UrbanPiper platform directly to billing and inventory systems for seamless operations.
- Partners: Foodics, oodo, Ginesys, RanceLab, and more.

Logistics Partners

- What it means: Access a network of delivery providers to ensure orders reach customers efficiently.
- Partners: Dunzo, Shadowfax, and others.

Payment Gateways

- What it means: Provide customers with a smooth and secure checkout experience.
- Partners: Razorpay, PayU, and others.

Marketing & Loyalty

- What it means: Enhance marketing efforts and reward loyal customers with dedicated platforms.
- Partners: Gupshup, and more.

The Benefits for Your Business

Ready to Grow with Us?

By leveraging our partner ecosystem, you gain access to a host of advantages designed to simplify your day-to-day operations and accelerate your growth.

- Unified Dashboard: See and manage all your orders from every channel in one place. No more switching between apps.
- Streamlined Operations: Eliminate manual data entry, reduce human error, and automate your workflows, from order placement to delivery.
- Expanded Customer Reach: Easily connect with new customers on the most popular delivery and discovery platforms.
- Data-Driven Insights: Get a holistic view of your business performance, empowering you to make smarter, more informed decisions.

Ready to Grow with Us?

UrbanPiper is more than just a platform; it's your all-in-one solution for managing and growing your online business. Ready to see the difference? Book a demo today to learn more about how our integrations can transform your operations

Business Manager

Introduction

UrbanPiper's Business Manager is designed to simplify the back-of-house operations for your restaurant. It offers features that allow you to manage multiple brands and locations, organize menus across various online food delivery platforms such as DoorDash, Grubhub, and Uber Eats, user management, and access analytics for informed decision-making. To access the Business Manager, you need to login to your Restaurant Portal at login.urbanpiper.com using your credentials.

Key Features of a Business Manager

Brand Management

Multi-Brand Support: Allows restaurants to manage each brand independently, making it ideal for groups with diverse brand offerings.
Consistency and Customization: Helps maintain a unified brand identity across platforms while enabling each brand to tailor operations to meet unique goals.

Location Management

Multi-Location Control: Offers centralized oversight for all outlets, allowing managers to monitor performance, menus, and operations in one place.
Real-Time Updates: Ensures immediate changes across locations, such as new promotions or menu updates, for seamless and synchronized operations.

Menu Management

Unified Menu Control: Restaurants can manage and update their menus across all platforms through a single interface.
Enhanced Features: Supports item availability management, pricing adjustments, and seasonal offers, providing flexibility for dynamic menu adjustments.

Analytics & Reporting

Sales and Performance Reports: Generates reports on key metrics, including sales trends and revenue growth, helping businesses identify strengths and areas for improvement.
Visual Analytics: Provides intuitive visuals and detailed performance metrics for in-depth insights into business operations.

User Management

Role-Based Access Control: Allows the creation of multiple user roles with custom access levels for store managers, staff, and administrators.

Secure Permissions: Protects sensitive data through permission settings, ensuring only relevant access for each team member.

Creating a Brand

{% embed url="https://urbanpiper.portal.trainn.co/share/v6PHwomkfNNyqWRzRJ9ZrA" %}

How to Create a Brand

UrbanPiper allows you to manage all your brands from a single place. Follow these steps to create a new brand:

1. Navigate to the **Brands** section from the navigation menu.
2. Here, you can view all the existing brands that have already been created.
3. To create a new brand, click on **Create New**.
4. Enter the name of the brand and click **Next**.
5. Choose the location you would like to associate with this brand.
6. Click on **Create** to add this new brand.

We have now successfully created a new brand.

{% hint style="success" %} At any given point of time you can create as many Brands as you want. Just make sure that you associate your locations correctly as explained in creating-a-new-location. {% endhint %}

Creating a new Location

{% embed url="https://urbanpiper.portal.trainn.co/share/thL637P4WHKx06rv9C4zcQ" %}

How to Add a New Location

In this article, we will guide you through adding a new location on UrbanPiper.

1. **Log into your Atlas portal:** Begin by logging-in into your Atlas portal.

2. **Navigate to Locations:** Click on the 'Location' tab.
3. **Add a New Location:** Click on 'Add Location'.
4. **Select Number of Locations:** Choose the number of locations you want to create.
5. **Enter Location Details:** Fill in the details for the new location, including:
    a. Name
    b. Address
    c. City
    d. The contact number of the restaurant
    e. Email address (if available)
6. **Proceed to Next Step:** Click 'Next' once all the details are entered.
7. **Multi-Brand Setup (Optional):** If applicable, associate the Brand with the location and click 'Next'.
8. **Catalog Options:** Choose to either copy the catalog from existing locations or skip to add it later.
9. **Select Platform or DSP:** Choose the platform or DSP with which you want to associate the location.
10. **Finish:** Click 'Finish' to add the location.

Your new location is now created.

Setting up Schedules for Locations

{% embed url="https://urbanpiper.portal.trainn.co/share/3ykCkZHVj88v5NtJCLz2QA" %}

How to Create Associate Schedules for Operating Hours at a Location

In this guide, we will learn how to create schedules to set the operating hours for a given location. Follow these steps to create and associate schedules effectively.

1. **Navigate to Schedules:**
    a. On the navigation section, click on **Groups**.
    b. Then, click on **Schedules**.
2. **Create a New Schedule:**
    a. Click on **Regular Schedules** and then **Create New**.
    b. Enter the name of the schedule.

    c. Click on **Next** to proceed.
3. **Add Timings:**
    a. Select the type of schedule: **Daily**, **Weekdays**, **Weekend**, or **Custom**.
    b. Select the open and close time.
    c. You can choose to add further timings if applicable.
    d. Once the timings are created, click on **Save**.
4. **Associate Locations:**
    a. Click on **Associate Your First Location**.
    b. Select the list of locations you want to associate with the schedule.
    c. Click on **Update** to finalize the association.

Now, the schedule has been successfully created and associated with the selected location. Thank you for following this guide!

Creating a Menu

{% embed url="https://urbanpiper.portal.trainn.co/share/QhB4CTEaUAPXb464NJTwGg" %}

How to Create a New Menu

In this video, let's see how to create a new menu on UrbanPiper from scratch.

Steps to Create a New Menu

1. Click on the **Create New** button on the menus list.
2. Define the following four parameters for the new menu:
    a. **Name:** The name of the menu.
    b. **Associated Brand:** The brand associated with the menu. UrbanPiper allows you to run multiple brands out of the same portal. You can choose any one of these brands while creating the menu. Note that if you want to run the same menu on two different brands, you need to duplicate the menu and associate it with the other brand.
    c. **Description:** A thorough description of the menu.
    d. **Cover Image:** An image representing the menu.
3. Fill in the rest of the attributes:

   a. For this example, we will call this a *regular menu*, a menu which the restaurant runs on a day-to-day basis.
   b. Provide a thorough description for it.
   c. Upload a cover image.
4. Once all the details are filled, click on **Submit** to create the menu.
5. To further proceed, you can either start with creating your first section or copy another menu.

And that's it! That's how you create a menu on UrbanPiper.

Configuring your Menu

{% embed url="https://urbanpiper.portal.trainn.co/share/oDc5q9lCcWv0jtQcs5vB4A" %}

How to Add Items and Sections to your Menu

In this guide, we'll walk through the steps to add items and sections to your menu. Follow along to easily manage your menu items.

Step 1: Select the Menu

First, navigate to the menu you want to modify. In this example, we'll use the regular menu associated with the Piper Pizza brand.

Step 2: Create a New Menu Section

Next, choose to create a new menu section. This will prompt you to enter the details of your first section.

- Name the section (e.g., "Pizzas").
- Associate a schedule.
- Optional: Add a description and cover image.

Once you've created your first section, you can continue to add more sections by clicking on the "Create Section" button. For example, add another section for "Appetizers" and then click on submit.

Step 3: Add Items to a Section

Now, let's add items to the "Pizzas" section:

- Go to the "Pizzas" section and click on "Add Items".
- Associate the pizzas from your base items.
- Click "Save" to complete the associations.

Step 4: Create Subsections

Let's create a subsection under "Appetizers":

- Go to "Appetizers" and create a subsection.
- Name the first subsection (e.g., "Garlic Bread").
- Associate the items (e.g., two types of garlic bread) to this subsection.

To add another subsection, follow the same steps. For example, create a subsection called "Fries". If you don't have any fries in your items, you can create a new item on the fly and save it.

Step 5: Edit Item Attributes

You can also edit attributes such as item name and price. For instance, you can associate an image to an item for better visual representation.

Conclusion

And that's it! You've successfully created sections and items on your menu. Easy as that.

Adding Modifier Groups and Modifiers

{% embed url="[https://urbanpiper.portal.trainn.co/share/slUFNxGGHTfebTm7EnQmXA"](https://urbanpiper.portal.trainn.co/share/slUFNxGGHTfebTm7EnQmXA) %}

How to Add Modifier Groups and Modifiers to Your Menu

In this video, let's see how to add modifier groups and modifiers to your menu. Before we get into the details of how to go about this, let's first learn about the different kinds of modifier groups on Urban Piper.

Types of Modifier Groups on Urban Piper

There are two types of modifier groups on Urban Piper:

- **Add-ons:** Optional modifications such as extra onion or extra chicken.
- **Variants:** Mandatory selections that you want an end user to make while buying an item. For example, size is a mandatory selection in a lot of restaurants, it has to be one of regular, medium, or large.

So, the modifier group size is a modifier group of type variants, while toppings are a modifier group of type add-ons.

Associating Modifier Groups and Modifiers to the Menu

Now that we have understood the types of modifier groups, let's move forward and understand how to associate these on the menu. Follow these steps:

1. Open the regular menu and select the item you want to modify, for example, an 8-inch golden corn pizza.
2. Click on the update button in the modifier group tab.
3. Associate the modifier group size to this pizza. Since size is a modifier group, you will also have to associate the modifiers belonging to size.
4. If you want to create new modifiers, click on the button to enter the details and save. However, in this case, we will associate the existing ones.
5. To change the price of a modifier, simply go and change the default sales price. For example, if it costs 100 rupees for a regular pizza, edit the default sales price to 100 and save it.
6. Similarly, you can edit the prices of the medium and large pizzas too.

And that's it! That's how you associate modifier groups and modifiers to a menu.

Importing your Menus

{% embed url="https://urbanpiper.portal.trainn.co/share/58DqFYSuncT3xFQeAbEp4w" %}

How to Import a Menu from a POS System

In this video, we will learn how to import a menu from a POS system. If you have a live POS integration on Urban Piper, you can make menu changes on the POS and import them to be published on the DSPs directly. This allows you to manage your menu from a single platform, which is your POS in this case.

Steps to Import the Menu from the POS

1. Head to Atlas and click on **Menu Management**.
2. Click on **Menus**. The screen will show you the active menu for your business.
3. Click on **Import Menu**.
4. Select the location from where you want to publish the menu.
5. Click on **Import**. A menu pull request will be triggered, and the menu will be updated from the POS.
6. You can also import the menu directly from the POS by clicking on the menu and selecting the menu.

Your menu import is in progress. It usually takes 2 to 5 minutes for the menu to be updated. Once the menu is pulled from the POS, you can make the necessary changes and publish the menu on the DSPs.

Publishing your Menu

{% embed url="https://urbanpiper.portal.trainn.co/share/Vt3JQbQUmm2Dtz6e6PkK4w" %}

How to Publish Your Menu on Urban Piper

In this video, let's see how to publish your menu on Urban Piper.

Types of Publishes

Let's start with learning about the different kinds of publishes you can do on Urban Piper:

- **Regular On-Demand Publish:** When you do an on-demand publish by clicking on *Publish Now*, we start the process of updating your menu as soon as you confirm that you want to publish your changes.
- **Scheduled Publish:** This option is used to update the menu at a later point in the future.

Ways to Publish a Menu

Now that you've understood the difference between the two, let me show you the different ways in which you can publish a menu on Urban Piper:

1. Through the Menus List

If you have made your changes already and simply want to publish the menu, click on *Publish Now* or *Scheduled Publish* button on the menus list to publish your menu.

2. Within a Menu

You can also publish a menu within the menu itself:

- **Publish Now or Schedule Publish:** Use the *Publish* button in the menu.
- **Preview Menu:** To do this, select the location and platform whose menu you want to preview. Our internal verification engine runs checks on your menu. If there are no errors or warnings, the menu is ready to publish. Once you've verified your menu, you can click on *Publish*.

Publishing Steps

1. Select the locations you want to publish to.
2. Select the platforms you want to publish to.
3. Click on *Publish*.

Scheduled Publish Steps

1. Click on the *Scheduled Publish* button.

2. Select locations and platforms in a similar way to a regular publish.
3. Our internal validation checks for errors and warnings on the menu.
4. Select the date and time.
5. Clicking on *Submit* confirms the schedule for a later point of time.

Canceling a Scheduled Publish

If you have set up a schedule, you can cancel it using the same flow as scheduling a publish. You'll see a *Cancel Scheduled Publish* button instead in that case.

And that's about it. That's how you publish a menu on Urban Piper.

Viewing your Orders

{% embed url="https://urbanpiper-support.portal.trainn.co/share/c9H3wMiP34fZOGDFAzeOoQ" %}

Keeping a track of your Orders

In this video, we explore how to effectively manage orders using the Urban Piper Business Manager. This tool empowers you to oversee all orders processed across various locations and platforms, complementing the day-to-day order management by operators and cashiers using the Order Tracker tool.

{% hint style="warning" %} This section will move under the 'Analytics' section in the near future. {% endhint %}

Viewing your Orders

1. **Login:** Visit login.urbanpiper.com and log in using your credentials.
2. **Access Orders:** Click on the 'Orders' section to view a list of orders processed across different locations and platforms for your business.

Order List View

- **Order ID:** Unique identifier for each order.
- **Platform IDs:** Identifiers for the platforms where orders were placed.

- **Date and Time:** When the order was placed.
- **Location:** The location for which the order was placed.
- **Customer Details:** Quick view of the customer information.
- **Payment Mode:** The method of payment used by the customer.
- **Order Status:** Current status of the order.
- **Amount:** Total amount for the order.

Order Details

To view detailed information about an order, click on the respective tab. This will display:

- **Order Summary:** List of items in the order, including any add-ons or customizations.
- **Special Instructions:** Any specific instructions provided by the customer.
- **Delivery Info:** Details about the delivery.
- **Customer Info:** Additional customer information.

Order Lifecycle

To acknowledge your orders and manage its delivery states, we recommend using our Store Manager.

User Access

{% embed url="https://urbanpiper.portal.trainn.co/share/e4oUhGbfTtJqgWnaq7VsAA" %}

User Access in Atlas

Navigation

Let's begin by navigating to the User Access section:

1. In the Navigation panel, click on the **Settings** tab.
2. From the drop-down, select the **User Access** tab.

Note: This section is visible only to users with Admin LOL.

Inviting a New Employee

To invite a new employee to join your team on Atlas:

1. Click on the **Invite** button.
2. Add the employee's email address.
3. Assign a role to the employee based on their responsibilities within your organization.

Access to various sections on Atlas is limited by user roles. For example, you can give access only to sections related to Marketing and Support roles for a specific user.

Sending the Invite

Once you've set up the invite:

1. An email invite will be sent to the employee's email address.
2. If the invite is not immediately visible, search your inbox with the subject line: *Your Atlas invite has arrived*.
3. Click on the **Join Team** button in the invite.

Completing the Profile

Upon accepting the invite, the employee will be prompted to:

1. Complete their profile with details like first name, last name, and phone number.
2. Validate their phone number with a one-time password.
3. Pick a unique username and set a password.
4. Enter their email address to create a new user account.

Once completed, the employee can log in to Atlas using their new username and password.

Tracking Invites

While waiting for staff to accept their invites, you can track them:

1. Go to the **Invites** tab to see all pending invites.
2. You have the option to resend or cancel an invite.

Understanding User Roles

Navigate to the **Roles** tab to view all user roles on Atlas:

- **Admin:** Provides unfettered access across the entire Atlas portal.
- **Default:** The role with the least access, allowing users to view catalogs and locations only.

To assign a role:

1. Click on the name of the role to view its details and permissions.
2. Click on the **Users** tab to view users associated with this role.
3. To assign a role to a new user, click on the **Update** button and select the user.

Updating User Roles

To update a user's role:

1. Go to the **Users** tab and click on the name of a user.
2. Update the role and click on the **Save** button.

Conclusion

This concludes the User Access section. We covered navigation, inviting new employees, tracking invites, understanding user roles, and updating user roles.

Thank you for watching!

Understanding Standard Roles in Prime & Atlas

Easily assign roles to your employees based on their responsibilities within your organization. This ensures your team has the right access to efficiently manage your business on both Prime and Atlas.

Standard Roles in Prime

Prime offers 6 standard roles, primarily for managing your in-store operations. You can also assign roles with limited access based on specific locations.

- Captain: Perfect for your front-of-house team. Captains take customer orders, especially for dine-in. Please note, they cannot settle bills; that's handled by Cashiers. This role is exclusively available on the Prime app (mobile/tablet).\
- Online Order Processor: This role is all about managing online orders. They handle tasks like printing bills/KOTs (Kitchen Order Tickets) and updating order statuses.\
- Online Order Supervisor: Beyond an Online Order Processor's duties, Supervisors can also manage your store's availability (open/close) and update outlet stock.\
- Cashier: Your counter expert! Cashiers manage operational shifts using registers, process bills, and complete settlements.\
- Manager: Managers oversee your store's daily operations. They handle inventory transactions and review important reports and analytics\
- Administrator: Typically, the store owner, Administrators have full access to Prime. They are responsible for critical functions like adding new stores and managing users.\

Custom Roles in Prime

Prime gives you the flexibility to create custom roles tailored to your specific needs. With custom roles, you can assign very specific permissions, giving you granular control over what each team member can do. This feature is exclusive to Prime.

Standard Roles in Atlas

Atlas provides a range of standard roles for managing your broader business operations and data. The location-level access is not available in Atlas

- Admin: The most powerful role in Atlas. An Admin has complete control over the platform, managing user accounts, system configurations, and all operational settings. This role is ideal for owners or top-level managers.

- Hub: Focuses on the central setup and crucial store-level configurations in Atlas. Hub users can view and update foundational settings, ensuring your business functions correctly within the platform.
- Catalogue: Manages all your product and service listings within Atlas. Users with this role can view, create, and update categories, items, modifiers, taxes, and charges, keeping your digital offerings accurate.
- Marketing: Equips your team to run promotions and engage customers in Atlas. This role allows users to view and create campaigns, manage customer segments, and implement discount strategies, driving sales and loyalty.
- Billing: Provides oversight of all financial transactions and credit management in your Atlas account. Billing users can access detailed transaction records and invoices, and initiate credit purchases.\
- Sales Analytics: Designed for in-depth analysis of your sales performance in Atlas. Users can access comprehensive reports on orders and revenue, helping them identify trends and make data-driven decisions.\
- Operation Analytics: Offers critical insights into the efficiency of your operations managed through Atlas. This role allows users to monitor order status metrics and analyze workflows to pinpoint areas for improvement.\
- Support: Tailored for customer service and feedback handling in Atlas. Support users can access customer details, manage feedback, and analyze NPS (Net Promoter Scores), crucial for enhancing customer satisfaction.
- Non-HQ Analytics: Provides access to analytics data, but strictly limited to specific locations. Users cannot download full business data or reports without a location filter, ensuring localized data security.\
- Non-HQ Report: Similar to Non-HQ Analytics, this role limits report access to designated locations only. Users cannot download reports that cover the entire business or access data for unauthorized locations.

How to Reset Your Password ?

{% embed url="https://urbanpiper.portal.trainn.co/share/ms29SQxkXPuI5lY3DcpR9g" %}

People often forget their user ID and password when logging into our platform. Here's a simple guide to updating your password.

Step-by-Step Guide

1. Visit login.urbanpiper.com.
2. Enter your registered phone number or email address.
3. Your user ID will be your registered email address or phone number.
4. Click Continue.
5. Select the Forgot Password option.
6. Check your registered phone number or email for an OTP.
7. Kindly input the OTP.
8. Create a new password. Please make sure your password is strong and unique.
9. Click on Reset Password.
10. Wait a moment. Your password has been reset successfully.

You can use this password for future logins. Thank you.

How to Reset PIN for Store Operations?

{% embed url="https://urbanpiper.portal.trainn.co/share/AOpBX1DvonfOYM3gHO0znw" %}

Steps to Reset the PIN

1. Navigate to All Apps.
2. Click on Settings.
3. Proceed to Users.
4. Search for the user name.
5. Locate your user account.
6. Open the user profile.
7. Select Edit access.
8. Scroll down to find the PIN section.
9. Enter the new PIN and save the changes.
10. Wait a moment for the changes to take effect.

How to Archive/Delete, or Restore Atlas or Prime User?

{% embed url="https://urbanpiper.portal.trainn.co/share/wCi4QMOkbt609c4BYiGefA" %}

This guide will walk you through the simple steps to manage user accounts in Atlas, including how to archive, delete, and restore users. We do not delete a user completely on Atlas.

Steps to Archive a User

Archiving a user allows you to retain their historical data for records while revoking their active access to Atlas.

1. Go to All Apps in your Atlas dashboard.
2. Select Settings.
3. Navigate to the Users tab.
4. Choose the user you want to archive.
5. Click the Archive button.
6. Check the box to confirm "Proceed with archiving the user."
7. Click Archive to finalize the process.

You'll see a "User archiving completed successfully" confirmation. All archived users are listed under the Archived status tab, allowing you to easily view them.

Restoring an Archived User

If you need to grant an archived user access to Atlas again, you can easily restore their account.

1. Navigate to the Users tab within Settings.
2. Change the status filter to Archived to view all archived users.
3. Select the user you wish to restore.

Click on the Reactivate user button (or Restore).

STORE MANAGER

Prime APP version

Connecting Your Tablet to Wi-Fi

In this guide, we'll walk you through the steps to connect your tablet to a Wi-Fi network. Follow these simple instructions to get your tablet online.

Step-by-Step Guide
Ensure Power Connection: Make sure your tablet is connected to power and is turned on.

Locate the Wi-Fi App: Once your tablet is on, look for the Wi-Fi app on the home screen.

Open the Wi-Fi App: Tap on the Wi-Fi app to open it.

View Available Networks: You will see a list of available Wi-Fi connections.

Select Your Network: Search for the Wi-Fi network you wish to connect to and click on it.

Enter Password: Input the password for the selected Wi-Fi network.

Connect: Hit the connect button, and you're all set!

Once connected, your tablet will have access to the internet via the selected Wi-Fi network. Enjoy browsing!

Connecting Printer to the tablet

{% embed url="https://urbanpiper.portal.trainn.co/share/lwCLecSnN7mG7yH00DI3VQ" %}

In this guide, we will walk you through the steps to connect your printer to a tablet. Follow these instructions to ensure a successful connection.

Step 1: Prepare your Tablet

- Ensure your tablet is plugged in.
- Log in to your Prime account on the tablet.

Step 2: Connect the Printer

- Connect the printer to the tablet using a USB cable.
- Turn the printer on.

Step 3: Configure Prime App Settings

- Once the printer is turned on, a pop-up will appear asking if you want to always allow Prime to open when the printer is connected.
- Enable the option and click **OK**.

Step 4: Connect the Printer to the Prime App

1. Click on **More** in the Prime app.
2. Scroll down to **Printer Settings**.
3. Click on the **USB** option to connect your printer via USB.
4. Select the connected printer, and you will see a connected symbol.

Once you see the connected status, your printer is now connected to the tablet. The printer is set to print both Bill and KOT by default.

Step 5: Test the Printer Connection

- Go to the **Online Order** section to test a printout.
- To test Bill printing for either format, open an active order and click on either **Bill** or **KOT**.
- If you receive the desired printout, your printer connection is successful.

Follow these steps to ensure your printer is properly connected to your tablet and ready for use.

Loading Printer Paper

Power-off the printer before Loading the paper Roll.

- Make sure the paper roll size is 3 ⅛' x 220' in size specifications. After getting the roll in your hand, remove the glue and roll about 1 inch of paper from the roll.
- Open the printer cover: Press the “Open” button to open the cover of the printer.\
- Remove the used old paper roll and Place the new paper roll: Remove the used, finished paper roll and the core. Hold the thermal paper roll by the edges and place it into the printer. Make sure the paper feeds from the bottom of the roll, coming up over the top. And the thermal side of the paper is close contact to the thermal printhead.
- Pull out some paper, and close the roll paper cover and Close the Cover, Once the paper is threaded through the printer, close the cover securely. Some printers may have sensors that detect when the cover is closed, so make sure it clicks or locks into place.
- Tear off the Excess paper.
- Turn on the printer and perform a test print: Power on the printer. It may automatically feed a small amount of paper to initialize. Perform a test print to ensure that the paper is loaded correctly and that the print quality is satisfactory.

Logging-in to Store Manger

{% embed url="https://urbanpiper.portal.trainn.co/share/661QImEdQWR6KsbBfkgA6g" %}

How to Log in to Prime on your Tablet

In this guide, we'll walk you through the steps to log in to Prime using your tablet device.

Steps to Log in:

1. **Power On Your Tablet:** Ensure your tablet is plugged into power and turned on.
2. **Locate the Prime App:** Once your tablet is on, find the Prime app on the home screen.
3. **Open the Prime App:** Tap on the Prime app to open it. You will be redirected to the login page.
4. **Initiate Login:** Click on the "Login" button.
5. **Enter Your Email Address:** Type in your email address and hit "Continue."
6. **Choose a Login Method:** You have two options to log in:
    a. **Enter Password:** Use your password to log in.
    b. **Get OTP on Email:** Choose to receive a six-digit one-time PIN (OTP) on your registered email address.
7. **Enter the OTP:** If you chose the OTP method, enter the one-time PIN you received on your email.
8. **Complete Login:** Hit the "Login" button.

You're all set! You now have access to Prime.

Enabling Auto-Print Settings

To connect printer to tablet, refer article: link.

Difference between Bill and KOT:

- **Bill:**
    - A Bill is a formal document issued to the customer at the end of a transaction.
    - It contains details like the list of items purchased, prices, taxes, discounts, and the total amount due.
    - The bill serves as a payment receipt and is used for billing the customer.
- **KOT (Kitchen Order Ticket):**

- A KOT is an internal order document used in restaurants to communicate food orders from the service staff to the kitchen.
- It lists the items ordered, their quantity, and any specific preparation instructions.
- The KOT helps the kitchen staff track orders, but it is not used for billing and has no pricing information.

Setting up Auto-Print:

{% embed url="https://urbanpiper.portal.trainn.co/share/0z1X6k6hpl73iLOOe9co7Q" %}

Steps to Enable Auto Print

1. **Access Printer Settings:**
    a. Click on *More* in the Prime interface.
    b. Scroll down and navigate to *Printer Settings*.
2. **Enable Automated Printing Workflows:**
    a. In the Printer Settings, scroll down to find the section for automated printing workflows.
3. **Auto Print a Bill:**
    a. Click on *Automatically print bill on*.
    b. Select the order status on which you would like the bill to be auto printed. It is recommended to set it to *Acknowledged*.
    c. Once the order is acknowledged with the DSP, a printout will be generated for your bill.
4. **Auto Print KOTs:**
    a. Click on *Automatically print KOT on*.
    b. Choose the desired status for auto printing KOTs.
5. **Disable Auto Print:**
    a. To disable auto print for either the bill or KOT, click on the respective option.
    b. Select the dotted status, and auto print will be disabled when no status is selected.

By following these steps, you can efficiently manage your auto print settings in Prime, ensuring that your billing and kitchen orders are printed automatically based on your preferred order statuses.

Managing Notifications

{% embed url="https://urbanpiper.portal.trainn.co/share/hyypWqvVkERelNmBPh2fsA" %}

In this guide, we'll walk you through the steps to customize your notification settings using Prime on your tablet.

Step 1: Access Notification Settings

- Ensure you're logged into Prime on your tablet.
- Click on **More** and navigate to the **Notification** tab.

Step 2: Customize Notification Settings

Within the Notification tab, you can modify settings for:

- New orders
- When a rider has arrived
- Cancelled orders

Enable or Disable Notifications

- By default, notifications are enabled for all statuses.
- To disable a notification, click on the toggle to turn it off.
- Click **Save** to confirm your changes.

Change Notification Tone

- Click on the pre-selected tone for the status you wish to change.
- Browse through the available tone options.
- Preview any tone by clicking on it.
- Select your desired tone and click **Done**.

Modify Notification Duration

- Click on the timer to adjust the duration of the notification.
- Choose from the available duration options.

- If you select **indefinitely**, the tone will continue until an action is taken on the order.
- Once you've selected the desired duration, click **Done**.

And that's it! Your notification settings are now customized to your preference.

Manage Orders on Order Tracker

{% embed url="https://urbanpiper.portal.trainn.co/share/n4K4o9XS082XZupmKuNq0A" %}

How to Navigate and Manage Orders Using the Order Tracker on the Prime App

In this guide, we will explore how to effectively use the Order Tracker feature on the Prime app to manage your orders.

Accessing the Order Tracker

Once you log into Prime, the default page that opens up is the Order Tracker page. Here, you can view all your orders for the current day.

Viewing Order Details

- Click on any order to open up the order details.
- View the items ordered, the quantities, and the price of each item.
- Click on **Total** to see the taxes, any discounts, and charges applied to the order.

Order Summary

The summary page provides information on:

- Type of the order (delivery or pickup)
- Order ID
- Time the order was placed
- Delivery time
- Additional details such as location name, platform, platform ID, and customer name

Managing Order Status

1. All new orders appear in the **New** tab.
2. Click **Accept** to move the order to the **In Progress** state.
3. Orders being prepared show up in the **In Progress** state.
4. Once prepared and packed, click **Food Ready** to move the order to the **Awaiting Pickup** stage.
5. Orders ready for pickup appear in the **Awaiting Pickup** stage.
6. When picked up by the rider, the order moves to **Dispatched**.
7. View dispatched orders under **Dispatch Status**.
8. Once delivered, the order moves to **Completed** status.
9. View all cancelled orders for the day under the **Cancelled** tab.

Using Filters

To modify your views on the order tracker:

- Click on the **Filter** option.
- Add filters to view orders for a specific location, platform, or sort by delivery time or time left to deliver.

Thank you for using the Prime app to manage your orders efficiently!

86'ing an Item or Modifier

{% embed url="https://urbanpiper.portal.trainn.co/share/rCxhgyi8883noi4q5pImyQ" %}

In this guide, we will walk you through the steps to 86 an item in the Prime App Inventory section.

Step 1: Log In and Access Inventory

- Log in to the Prime App.
- Navigate to the Inventory section.

Step 2: Select Location

- Click on the Location selection.

- Choose the desired location from the list associated with your user.

Step 3: Search for the Item

- View all sections associated with the menu on the left.
- Select a section to easily search for the item you want to 86.
- Alternatively, filter items by selecting all items, items in stock, or items out of stock.

Step 4: Toggle Item Status

- To mark an item in stock or out of stock, click on the toggle to turn the item off.
- You can 86 multiple items by scrolling through the menu and toggling multiple items.

Step 5: Manage Modifiers

- Select modifiers and toggle them on or off by clicking on modifiers for any item.
- Scroll through different modifier groups and toggle the desired modifiers.

Step 6: Set Snooze Duration

- Return to the inventory section and click on snooze.
- Choose a time period to turn the item off, either indefinitely or for a specific duration.
- For a custom duration, set a date, click OK, and choose a time.

Step 7: Save Changes

- Once you've selected the duration, click save.
- The items and modifiers will be snoozed until the selected date and time.

Additional Tips

- Use the search bar to find an item by entering its name and toggle it on or off.
- To turn off selected modifiers, navigate to the modifier section, toggle them off, click snooze, select the duration, and save.

By following these steps, you can efficiently manage your inventory and 86 items as needed in the Prime App.

Pause/Resume Store

{% embed url="https://urbanpiper.portal.trainn.co/share/lpDqcladvlfa547zdURVYQ" %}

In this guide, we will walk you through the steps to pause or unpause your store on different platforms. Follow these simple steps to manage your store's availability across various delivery channels.

Step-by-Step Guide

1. **Log in to Prime:** Start by logging into your Prime account.
2. **Access More Options:** Once logged in, click on the *More* option.
3. **Platform Toggle:** Click on the platform toggle option to proceed.
4. **Select Your Store:** Choose the store you wish to pause or unpause by clicking on the store selection bar.
5. **View Associated Platforms:** After selecting the store, you will see the different platforms that the store is associated with.
6. **Pause or Unpause:** To pause or unpause the store on any desired platform, simply click on the toggle for the respective platform.
7. **Save Changes:** Once you have made your selections, click *Save* to apply the changes.

By following these steps, you can easily manage your store's status on various platforms, ensuring that your store is available or unavailable as per your requirements.

Password Reset on Store Manager

{% embed url="https://urbanpiper.portal.trainn.co/share/vwoneLz56hWJFATUwb2m0g" %}

How to Reset Your Password on the Prime Application

In this guide, we will walk you through the steps to reset your password on the Prime application using your tablet.

Steps to Reset Your Password

1. **Open the Prime App:** Launch the Prime application on your tablet.
2. **Click on Login:** Tap the 'Login' button to proceed.
3. **Enter Your Email:** Input the email address linked to your Prime account and click 'Continue'.
4. **Forgot Password:** If you can't remember your password, select the 'Forgot Password' option.
5. **Receive Authentication PIN:** A one-time authentication PIN will be sent to your registered email address.
6. **Check Your Email:** Access your email to find the one-time PIN.
7. **Enter the PIN:** Input the received PIN into the Prime app and click 'Verify'.
8. **Set a New Password:** You will be redirected to a page to set a new password. Enter your new password of choice. Re-enter the password to confirm the change.
9. **Reset Password:** Click on 'Reset Password' to finalize the process.
10. **Login with New Password:** You will be redirected to the login page. Enter your new password to continue using Prime.

Congratulations! You have successfully reset your password on the Prime application.

Aggregator / Delivery Partner Support Contacts

Need Help with Delivery Partner or Order Logistics?

If you're facing issues **after an order has been placed**, such as:

- A delivery partner is not picking up the food
- No rider is being assigned
- Delays or order fulfillment issues

We understand how frustrating this can be. Here's what you need to know:

🔍 *Who Handles What?*

Once an order is placed on an aggregator platform (like Swiggy, Zomato, or Magicpin), **order fulfillment and delivery logistics are managed directly by the aggregator**.

This includes:

- Delivery partner assignments
- Pickups
- Real-time tracking issues
- Delivery delays

✅ *What You Should Do*

For the **fastest resolution**, we recommend reaching out **directly to the aggregator's support team**. They are best equipped to assist you with post-order logistics.

📱 *Where to Find Aggregator Support Contacts in Prime*

You can quickly find the relevant contact numbers in your **UrbanPiper Prime App**:

1. Open the **Prime App**
2. Go to the **"More"** section
3. Tap on **"Aggregator Support."**
4. You'll see a list of support contact numbers for all integrated aggregators

📞 *Common Aggregator Support Numbers*

- **Swiggy Support**:

080-6744-6677
080-6817-9777

- **Zomato Support**:

011-4989-4800

- **Magicpin Support**:

7510-175-101

{% hint style="info" %} By contacting the aggregator directly for delivery-related concerns, you ensure the **quickest and most accurate resolution** to your issue.

If you encounter issues before placing your order, such as menu syncing or item availability, please don't hesitate to contact **UrbanPiper Support**. {% endhint %}

Prime Web Version

Introduction

{% embed url="https://urbanpiper.portal.trainn.co/share/KojPMTyzsW7G0jBakHl9Ew" %}

In this guide, we will explore how to manage orders using the Prime Order Tracker tool. This tool helps in managing online orders, controlling stock, configuring printers, and managing notifications.

Accessing the Prime Order Tracker

1. Navigate to **Online Orders** and then to **Live Orders**.
2. Here, you will see the interface where all new orders will appear.
3. On the top, you can view the different states of the orders.

4. Use the **Stock Control** button for managing stock, and access additional settings through the three dots menu.

Managing Orders

1. When a new order arrives, it will appear as a new order in the Order Tracker UI.
2. You can choose to set the order to auto-acknowledgment or manually accept the orders based on your settings.
3. View all order information, including item details and customer details.
4. Accept the orders, which can be done automatically or manually.
5. Once accepted, the order moves to the **In-Progress** state ,and a Kitchen Order Ticket (KOT) is printed.

Order Fulfillment

1. The KOT is sent to the kitchen for food preparation.
2. Once the food is ready, mark the order as **Food Ready**. This step can also be automated or done manually.
3. After marking as food ready, the order status changes to **Waiting for Pickup**.
4. Orders can be delivered by an aggregator or by the merchant, depending on your business setup.

That's it for managing orders using the Prime Order Tracker.

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Managing Store Status

{% embed url="https://urbanpiper.portal.trainn.co/share/mBX6UUm9VWMAl57E4tvdRA" %}

In this guide, we will walk you through the steps to set up an online store using PrimeOrder Tracker. Follow these simple steps to manage your store's online status effectively.

Step-by-Step Guide

1. **Access Live Orders:** Begin by heading to the Live Orders section in PrimeOrder Tracker.

2. **Open Session Settings:** Click on the three dots located beside the Stock Control option and select Session Setting.
3. **Select Your Store:** In the Session Setting, you will see a list of all the stores associated with your business. Choose the desired location you wish to make online.
4. **Toggle Online Status:** To mark your location online, simply toggle on the button provided.
5. **Save Changes:** Hit the Save button to queue the request.
6. **Verify Logs:** Once the request has been queued, a log will be captured in the Log section of PrimeOrder Tracker. To verify, head to the Logs tab where you can see the log confirming the store has been marked online.

Thank you for using PrimeOrder Tracker to manage your store's online presence.

Managing Stock/86'ing an item or modifier

{% embed url="https://urbanpiper.portal.trainn.co/share/jvK5OJUgxB8c6l8E3IFiLw" %}

In this guide, we will learn how to manage stock using Prime Order Tracker. This involves managing the stock of items or modifiers efficiently.

Step 1: Access Stock Control

- Navigate to the **Stock Control** section.
- Here, all items will be listed.

Step 2: Toggle Item Availability

- To turn off an item, simply toggle off the button next to it.
- Ensure to save the changes made.

Step 3: Manage Stock Across Locations

- Use the Stock Control feature to manage stock across different locations.
- View all in-stock and out-of-stock items at once.
- Filter items category-wise for more specific control.

Step 4: Control Modifier Stock

- Navigate to the modifier section to control the stock of modifiers.
- Toggle the top button and hit Save to switch off the particular item or modifier on the aggregator's UI.

Step 5: Verify Changes

- Go to the **Live Orders** section.
- Access the **Logs** to verify if the item was successfully turned off.

Thank you for using Prime Order Tracker to manage your stock efficiently.

Connecting a printer

{% embed url="https://urbanpiper.portal.trainn.co/share/d1LDsZQ05myN1Mj7CsvayQ" %}

How to Connect a Printer on PrimeWeb

In this guide, we will walk you through the steps to connect a printer on PrimeWeb. Follow these instructions to successfully configure your printer.

Step-by-Step Guide

1. Navigate to the **Prime Online Order** tab.
2. Proceed to the **Live Orders** section.
3. Next to **Stock Control**, locate the three dots icon and click on it.
4. Select **Session Setting** from the dropdown menu.
5. In the settings menu, choose the **Printers** tab.
6. Verify if **QZTray** is connected. Ensure it shows as connected.
7. Click on **Add Your First Printer**.
8. Allow Prime to scan for available printers, then click on **Add**.
9. Once the printer is added, test the print function.
10. A printer notification will appear, confirming successful configuration.

Congratulations! You have completed the printer configuration on PrimeWeb. Thank you for following this guide.

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Connecting a Printer on macOS

{% embed url="https://urbanpiper.portal.trainn.co/share/5IGOAS91zKGDICD8u8QC1g" %}

In this guide, we will walk you through the steps to connect a printer to your macOS system. Follow these instructions to ensure a successful connection.

Step-by-Step Guide

1. **Ensure the Printer is Ready:**
   a. Make sure your printer is switched on.
   b. Ensure the USB cable is properly connected between the printer and your macOS system.
2. **Access System Settings:**
   a. Click on the Apple symbol in the top-left corner of your screen.
   b. Search for "Printer and Scanner" in the search bar.
3. **Add the Printer:**
   a. Click on the "Add Printer" button.
   b. Click on "Search Printer" to find available printers.
4. **Select Your Printer:**
   a. Choose the printer you want to add. In this example, we are adding an Epson printer.
5. **Choose the Appropriate Driver:**
   a. Select a driver that is compatible with your Epson printer model.
6. **Finalize the Setup:**
   a. Click on "Add" to complete the setup.
   b. Your printer will now appear in the "Edit" section of your system settings.

You can also check the printer details in the system settings to ensure everything is set up correctly.

Thank you for following this guide!

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Assigning a printer for KOT/Invoice

{% embed url="https://urbanpiper.portal.trainn.co/share/ENbEvOUv44ba1UgrZv4HhA" %}

How to Assign a Printer to KOT and Invoice

In this guide, we will walk you through the steps to assign a printer for KOT (Kitchen Order Ticket) and Invoice. Follow the steps below to complete the setup.

Steps to Assign a Printer

1. Head to **Prime** and navigate to **Live Orders**.
2. Click on the three dots to access more options.
3. Select **Session Settings** from the dropdown menu.
4. Go to the **Printers** tab.
5. Scroll down to find the **Receipt Printers** section.
6. Click on the **Settings** icon next to the printer you want to assign.
7. Assign the added printer in the designated field.
8. Ensure the toggle is always enabled to activate the printer.
9. You can increase the number of printers if needed.
10. Adjust the number of copies to be printed as per your requirement.
11. Once all settings are configured, hit **Save Changes**.

Thank you for following this guide. Your printer is now successfully assigned to KOT and Invoice.

Configuring print automations

{% embed url="https://urbanpiper.portal.trainn.co/share/5aMA0rVYgIv60u19ERzQFQ" %}

How to Configure Print Automation for KOT and Invoice

In this guide, we will walk through the steps to configure print automation for Kitchen Order Tickets (KOT) and Invoices.

Step-by-Step Guide

1. **Access Live Orders and Session Setting:**

Begin by navigating to the Live Orders and Session Setting section of your system.

2. **Navigate to the Printers Tab:**

Once in the settings, locate and click on the Printers tab.

3. **Scroll to Receive Printers:**

Scroll down until you find the Receive Printers section.

4. **Open Settings:**

Click on the Settings icon to access further configurations.

5. **Automated Workflow Configuration:**

Go to the Automated Workflow tab. Here, you can assign automation for various states of an order such as Acknowledgement, Food Ready, and Dispatch. Choose the desired state for automation.

6. **Save Changes:**

After selecting the appropriate automation settings, ensure to save the changes.

Once these steps are completed, all printers will automatically print on the Acknowledgement for KOT and Bill. Thank you for following this guide!

Printing KOT for Kitchen Stations

{% embed url="https://urbanpiper.portal.trainn.co/share/VcT16Zgc7Y8I2oc4GkaRsw" %}

How to Set Up and Assign a Kitchen Station for Printing KOTs

In this guide, we will walk you through the process of setting up and assigning a kitchen station for printing Kitchen Order Tickets (KOTs). Follow these steps to print KOTs for a separate kitchen station or category.

Step 1: Set Up a Kitchen Station

1. Go to **Company Admin**.
2. Click on **Settings Head** and navigate to **Kitchen Operations**.
3. Click on **Add New**.
4. Enter a name for the kitchen station, for example, **Juice Counter**.
5. Click on **Add**.

Step 2: Assign the Kitchen Station to a Category

1. Go to the **Catalog** and then **Category**.
2. Select your desired category.
3. Navigate to your kitchen stations.
4. Select the kitchen station type.
5. Click on **Save**.

Step 3: Assign a Printer to the Kitchen Station

1. Head to the **Point of Sale**.
2. Click on the **three-dot button**.
3. Select **Session Setting** and go to **Printers**.
4. Scroll down to **Receipt Printer**.
5. Click on the **Settings icon**.
6. Assign a printer to the counter.
7. Click on **Save Changes**.

Now you will be able to print the KOT according to the kitchen station, **Juice Counter**.

Thank you for following this guide!

Configuring Scan and Pack Workflow on Prime

{% embed url="https://urbanpiper.portal.trainn.co/share/aCKMSr2ersbRRaQ9lmWSvw" %}

In this guide, we will walk you through the steps to enable and utilize the scan and pack workflow on the Prime system. This feature is designed to streamline operations and can be activated by the internal Urban Piper team. Follow the steps below to get started.

Enabling the Scan and Pack Module

1. Contact the Urban Piper customer service team to request the activation of the scan and pack workflow.
2. Once approved, go to the **All Apps** section.
3. Navigate to **Company Settings**.
4. Click on the **Internal** section and locate the **Module** option.
5. In the **Internal Module** section, search for **Scan and Pack** and activate the module.
6. Note: This setting can only be enabled by the Urban Piper team.

Activating the Scan Barcode Workflow

1. Access the **Live Orders** section.
2. Search for the **Scan Barcode Flow** and ensure the setting is enabled.

Understanding the KDS for Scan and Pack Workflow

Let's explore how the Kitchen Display System (KDS) appears for the scan and pack workflow:

1. Navigate to the **KDS**.
2. When the **Print Label** toggle is enabled, it provides a separate print label for each item to be marked as prepared.
3. Each item's print label should be scanned with the same scanner.

Flow Without Print Label Functionality

1. Disable the **Print Label** setting.
2. After disabling, the order level bill can be scanned to mark food as prepared for the scan and pack workflow.

Testing the Workflow with an Online Order

1. Check if an online order has arrived by heading to the **Live Order Module**.
2. Acknowledge the order.
3. After acknowledging, a KOT and corresponding bill with a barcode will be generated.
4. Go to the **KDS Module**.
5. The KDS will display the order.
6. Scan the barcode with the connected device to mark the food as ready and set for dispatch.
7. Observe that the order is indicated as ready and listed under the **Waiting for Pickup** section.

Thank you for following this guide on enabling and using the scan and pack workflow on Prime.

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How to Customize Order Notification Settings?

{% embed url="https://urbanpiper.portal.trainn.co/share/orEDLQ7VjEuC29vipBFOkA" %}

This guide will walk you through the simple process of tailoring your notification preferences for various order-related events in Atlas. Stay informed about what matters most to your business!

Step-by-Step Guide

1. Access Online Order Section: Start by navigating to the Online Order section within your Atlas system.

2. Open Session Settings: On the right side of the screen, locate and click the vertical three-dot option (⁝). From the dropdown menu, select Session Settings.
3. Manage Notifications: Within the Session Settings, you will find options to manage notifications for a variety of events, including:
4.
    a. New orders
    b. Customer complaints
    c. Cancelled orders
    d. Stock toggles (availability changes)
    e. And other important updates.
5. Enable Your Preferred Notifications: Simply toggle on the notifications you wish to receive to stay updated.
6. Set Notification Sound: Choose a distinct notification sound from the available options to easily identify incoming alerts.
7. Save Your Settings: After making your selections, click Save to apply your changes.

Please Note: These notification settings are specific to your individual system configuration.

Thank you for using this guide to optimize your order notifications!

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description: A Guide for UrbanPiper Integration with Foodics.

Foodics

Introduction

The **Foodics <> UrbanPiper integration** streamlines restaurant operations by bridging the POS system (Foodics) with major food aggregators through UrbanPiper's middleware platform. This integration ensures accurate order syncing, centralized menu control, and reduced manual errors—ultimately improving operational efficiency for restaurants.

Integration Capabilities:

- **Real-Time Syncing**: Automatic synchronization of orders, menus, and item availability between Foodics and online delivery platforms (e.g., Talabat, Careem, Zomato).
- **Centralized Management**: Control multiple aggregator menus and operations from a single UrbanPiper dashboard.
- **Inventory & Stock Sync**: Item stock updates from Foodics are reflected on aggregators through UrbanPiper.
- **Order Status Updates**: Seamless transmission of order status changes (accepted, preparing, dispatched) from Foodics to aggregators.

Order Relay:

- Orders placed on aggregators are received by UrbanPiper and instantly **relayed to Foodics POS**.
- Ensures **minimal delay** in order entry, reducing the dependency on manual punch-ins.
- **Order details** like customer info, delivery instructions, and modifiers are passed completely.
- **Order status changes** in Foodics automatically reflect on aggregator platforms via UrbanPiper.

Menu Management:

- Merchants can **push menu changes from Foodics to UrbanPiper**, which then syncs to all linked aggregators.
- **Menu version control** ensures changes are traceable and consistent.
- Supports:
    - Item and modifier mapping
    - Tax & pricing structure sync
    - Availability toggling (e.g., mark items out-of-stock from Foodics)
- Reduces **operational overhead** of managing menus on each aggregator manually.

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Menu Management:

- Merchants can **pull the menu changes from Foodics to UrbanPiper**, which then syncs to all linked aggregators.

Product Name, Price, Description, and Image

- These elements should be **updated directly in the Foodics dashboard**.
- **Do not update** them via UrbanPiper, as Foodics remains the source of truth for menu data.
- **Product Translation**
  - Translations should also be handled in Foodics, **not in UrbanPiper**.
- **Product Availability (In/Out of Stock)**
  - **Item-level availability** can be managed directly from Foodics.
  - It should **not be controlled from UrbanPiper**
- **Menu Sync Status**
  - Not visible or tracked in Foodics.
  - The **sync status is managed in UrbanPiper**.

Syncing Menu changes to UrbanPiper

UrbanPiper's integration with Foodics allows you to **pull the menu directly from the Foodics POS**, ensuring consistency across all aggregator platforms. Follow the steps below once all necessary changes have been made in the Foodics console.

Step-by-Step Process:

1. **Login to Atlas (UrbanPiper Business Manager):**
2. Navigate to the Atlas dashboard using your UrbanPiper credentials.
3. **Go to Catalogue → Items:**

In the left-hand menu, select **"Catalogue"**, then click on **"Items"**.

4. **Initiate Menu Import:**
   a. Click on the **three dots (⁝)** on the top right corner.
   b. Choose **"Import Menu"** from the dropdown.
   c. Select the appropriate **location** for which you want to sync the menu.
   d. Click on **"Import"** to start the process.
5. **Wait for Sync to Complete:**

The import process typically takes a **few minutes**. UrbanPiper will pull the latest menu data (items, modifiers, prices, etc.) from Foodics.

6. **Publish the Menu to Aggregators:**

Once the menu has been refreshed on UrbanPiper:

   a. Go to the **“Catalogue”** section.
   b. Select the relevant location and channel (e.g., Talabat).
   c. Click on **“Publish”** to push the updated menu to the aggregator platforms.

Creating & Managing Menu Groups

The **Menu Groups** section in Foodics allows you to organize your items into categories before pushing them to UrbanPiper. Menu Groups are essential as they determine how your menu will appear on aggregator platforms.

How to Create a New Menu Group

Follow these steps to create a menu group (e.g., Starters, Main Course):

1. Log in to the **Foodics Web Console**.
2. Click on **Menu** in the left-hand sidebar.
3. Click on **Groups**.
4. Click on **Create Group**.
5. Name your group appropriately (e.g., *Burgers*, *Beverages*).

Each group created here is equivalent to a **category** in your delivery menu.

1.2 Adding Products to Groups

Once your group is created, add products to it as follows:

1. Go to **Menu > Groups**.
2. Click on the specific group you wish to edit.
3. Click on **Add Products**.
4. A pop-up will appear showing all existing products in your Foodics account.
5. You can filter and select items using:
   a. **Product List**

b. **Tags**
c. **Categories**

6. After selecting the desired items, click **Save**.

Repeat this process to create and populate all necessary groups/categories.

Creating the Master Group (UrbanPiper Menu)

To push the menu to UrbanPiper, you must create one **master group** that contains all the individual category groups.

Steps:

1. Navigate to **Menu > Groups**.
2. Click on **Create Group** and name it **urbanpiper.**
3. Scroll to the **Subgroups** section within the group creation screen.
4. Click on **Add Subgroups**.
5. Select all the groups (categories) you created earlier.
6. Click **Save**.

This master group represents your **complete menu** and will be pushed to UrbanPiper.

Sorting Products Within a Group

To sort the order in which products appear on aggregators:

1. Go to **Menu > Groups**.
2. Select the desired group.
3. Click on **Sort Group**.
4. Use **drag and drop** to reorder the products as needed.

This order will be reflected when the menu is published to UrbanPiper and synced with delivery platforms.

{% hint style="warning" %} Always ensure the name of the master group is set as **urbanpiper** and is properly structured before importing it to UrbanPiper.

After syncing, you can log in to UrbanPiper and publish the updated menu to aggregators like Talabat, etc. {% endhint %}

Configuring payment methods

Payment methods created in **Foodics** can be **mapped to specific delivery channels** on **UrbanPiper**. For example, you can associate all orders coming from platforms like **Talabat** or **Careem** with a designated payment method (e.g., *Talabat Cash*, *Careem Online*). This helps in **accurate sales reporting and reconciliation**.

How to Create Payment Methods in Foodics

Follow these steps to create and configure payment methods in the Foodics console:

1. **Login to your Foodics Web Console**.
2. Click on **Manage** from the main navigation.
3. Click on **More**.
4. Select **Payment Methods**.
5. Click on **Add Payment Method**.

A pop-up window will appear with the following fields:

- **Name**: Enter a descriptive name (e.g., *Talabat Cash*).
- **Name Localized (Optional)**: Add a localized name for multi-language support.
- **Type**: Choose **Cash** or **Card** based on how the payment is collected.
- **Code (Optional)**: Input an internal reference code if required.
- **Auto Open Cash Drawer**: Enable this option if you want the cash drawer to open automatically when this method is used at the POS.

6. Click on **Save** to finalize.

{% hint style="info" %} Once the payment methods are created in Foodics, coordinate with your **UrbanPiper account manager or support team** to **map these methods** correctly to the respective aggregator channels. This ensures proper payment attribution in reporting and analytics. {% endhint %}

Enabling Price Tags on Foodics-Aggregator-Specific Pricing

The **Price Tags** feature in Foodics allows restaurants to assign **different prices for the same product** based on the delivery channel, without duplicating the item. This is especially helpful when pricing needs to vary between channels such as **Talabat**, **Careem, etc.**

How to Create and Apply Price Tags in Foodics

Follow the steps below to configure price tags:

1. **Login to the Foodics Web Console**.
2. Navigate to **Manage > More > Price Tags**.
3. Click on **Create Price Tag**.

A pop-up window will appear with the following fields:

- **Name**: Enter the price tag name (e.g., *Talabat*, *Zomato*, etc.).
- **Order Tags (Optional)**: Link an order tag if needed.
- **Branches**: Choose whether this pricing applies to **all branches** or only specific ones.

4. Click on **Save**.

Adding Products to a Price Tag

Once the price tag is created, you can apply it to products as follows:

5. Click on the created **Price Tag**.
6. Click on **Add Products**.
7. Select the relevant product(s) from the list.
8. Click **Save**.

Now, the selected products will reflect the pricing defined under this tag when orders are placed through the corresponding delivery channel integrated via **UrbanPiper**.

{% hint style="info" %} This setup is ideal for managing pricing strategies across various platforms while maintaining a unified product database in Foodics. {% endhint %}

description: Learn how to connect your POS with UrbanPiper

Lightspeed K-Series

Introduction

The following section will provide a walkthrough of different steps to connect your Lightspeed KS series with UrbanPiper.

Authorization

In all Lightspeed K-Series onboarding flows, authorization is the first step. This enables UrbanPiper to establish a connection with the Lightspeed K-Series POS.

This can be accomplished through the UrbanPiper Atlas Portal by navigating to—

&#xNAN;*Settings → POS Integrations → Checking the Tick Box → Authorize*.

(if you do not see the option, it could be due to the fact that your POS integration is not enabled. Connect to the customer service team to get this set up for your account)

This will direct the client to the Lightspeed login page.

Authorising your UrbanPiper portal with Lightspeed

The Lightspeed Login Page will require the user to use their Lightspeed POS backoffice `Username` and `Password`. Once logged in, the screen will display 3 options, and the Client will need to enable all 3.

Once this is completed, the Client will be authorized and will see the following screen on UrbanPiper Atlas.

Post authorisation confirmation

Configuration setup for Order injection and Menu publish

NOTE: The Order and Menu Configs will need to be processed by the UrbanPiper CSM Team.

Configs On Lightspeed K-Series POS

This is a multi-step task that requires processing on the Lightspeed K-Series POS Backoffice by the Client or by the UrbanPiper Team with Approval from the Client.

Create UrbanPiper Accounting Group

The Client/CSM is required to create a new Accounting Group on the Lightspeed K-Series POS Backoffice.

Login to Lightspeed K-Series:

&#xNAN;*Back Office → Menu Management → Accounting groups → Add an Accounting group*

Adding UrbanPiper as an Accounting Group

Fill in the following values for the fields—

Accounting group name: UrbanPiper (For ease of Identification)

Accounting ID: “Leave Undefined”

Tax profile: No Tax (as this is a non-taxable field)

This configuration allows the characterisation of the items that will be created by the Client to manage the Integration.

Create Charge and Discount Items

The specific charges received from the Aggregators will be relayed to the POS with the above tags. if the Client requires Aggregator-specific charges, the same needs to be created Aggregator-specific on the POS Backoffice.

Menu Management in Lightspeed K-Series

&#xNAN;*Back Office → Items → Create → Single Item*

Creating a Charge

Providing Charge details

The following charge items must be created in POS Backoffice and assigned to the previously created Accounting Group named "UrbanPiper":

- Service Charge
- Delivery Charge
- Packaging Charge
- Surcharge

Additionally, the following discount items should also be created:

- Uber Eats Discount
- Deliveroo Discount

- Just Eat Discount

Important Configuration Details:

All items listed above must:

- Be added to the UrbanPiper Accounting Group
- Have their price type set to "Manually-entered price"
- Share SKU codes for each of the above create Items with the UrbanPiper CSM team (to be updated in the Atlas Portal)

Create Payment Methods

To support handling third-party/ Aggregator platform transactions, the following custom Payment Methods need to be created in the Lightspeed K-Series POS Backoffice

Lightspeed K-Series POS Backoffice

Configuration → Settings → Payment Methods → Add Payment Methods

Payment methods

Payment Methods to Create:

- ubereats-cash
- ubereats-online
- deliveroo-cash
- deliveroo-online
- justeat-cash
- justeat-online\

Creating a new Payment Method

Fields:

- Payment method type: Other Payment Methods
- Code: “the above mentioned” (Please note the code is case sensitive, please copy and paste the above mentioned as the codes)

- Name: Can be the same as code
- Accounting Reference: can be left blank
- Allow Tipping: “True”

This data, using the same codes shared above, will be backfilled intothe Atlas Portal.

Create Order profiles (Optional)

The client will need to create Order profiles in the Lightspeed K-Series POS Backoffice if they require the orders to be segregated based on the Aggregators - *Recommended*

Lightspeed K-Series POS Backoffice Configurations > Settings > Order profiles > Add Order profiles

Order Profiles to be created:

- ubereats-menu
- justeat-menu
- deliveroo-menu

Order Profile details

Fields:

- Name: same as code
- Code: “mentioned above”
- Play sound when receiving online order: “True”
- Takeaway mode: Pick Up
- Order completion: “Complete when ready for Delivery”
- Production deadline: “Disabled”
- Show delivery code on receipt: “True”
- Print a draft receipt when the order is created: “True”

Other Optional Configs

Fields:

- Lightspeed POS - Timezone: Select based on location
- Lightspeed POS - Tax Exclusive: Config for NOAM
- Lightspeed POS - Is region North America or not: Config for NOAM
- Lightspeed POS - Food prep time (in minutes): Set-up to establish the delay in relay of Future orders (only) to POS.
- Lightspeed POS - Food prep plus delivery time (in minutes): Set-up to establish the delay in relay of Future orders (only) to POS
- Lightspeed POS - Enable Order Failure Workflow: to track order ingestion on POS and to trigger Push to POS in case of failure via the Prime app
- Lightspeed POS - Enable Order Failure Notification: triggers notification to Lightspeed POS for order failure and reason for failure.

Configs On UrbanPiper Atlas Portal

Once above mentioned Accounting Group, items, payment types and Order Profiles are created in the Lightspeed K-Series POS Backoffice you can would need to update some details on the Atlas portal to ensure that the integration with Lightspeed works as expected.

Create your Locations

The locations can be created on the UrbanPiper Atlas Portal to match the locations on the POS end.

The Locations can be created as following:

Navigate to *Locations Tab* → *Add Location* → *Select Single* or *More than One* → *fill in required Details* → *Save*

Adding a Location

Once the location is created, the Lightspeed POS Location ID needs to be added into the POS ID field. The Lightspeed Location ID can either be sourced from the Liughtspeed HomePage URL or Via Postman - (Automation for this process is under development)\

Adding details for your Location

Setting up Order Relay

These are the configurations to be done on the UrbanPiper Atlas Portal specifically for order relay to Lightspeed K-Series POS.

This step is again divided into multiple steps.

Lightspeed POS - Account Profile

This field directly corresponds to the Order profiles on Lightspeed K-Series POS. Here, the user will need to input the previously created Order profiles on Atlas, associating them with the correct Aggregator. \

The same structure needs to be followed for all relevant aggregators.

Lightspeed POS - Charge ID

This field directly corresponds to the Charge Items created on Lightspeed K-Series POS. Here, the user will need to input the previously created Charge Item SKUs on Atla, associating them with the correct Aggregator and Charge Name. (Please note that this is case sensitive.)

The string values are the Charge Item SKU on Lightspeed K-Series POS Backoffice.

Lightspeed POS - Discount ID

This field directly corresponds to the Discount Items created on Lightspeed K-Series POS. Here, the user will need to input the previously created Discount Item SKUs on Atlas, associating them with the correct Aggregator. (Please note that this is case sensitive.)

The string values are the Discount Item SKU on the Lightspeed K-Series POS Backoffice.

This field directly corresponds to the Payment Methods created on Lightspeed K-Series POS. Here, the user will need to input the previously created Payment Methods on Atlas, associating them to the correct Aggregator and type ie. Cash and Online. (Please note that this is case sensitive).\

Menu Configuration

Fields:

- Lightspeed POS Menu - Domain value: Menu Name on Lightspeed POS
- Lightspeed POS Menu - ikentooMenuId: Menu ID on Lightspeed POS (Can be sourced via the Menu URL or Postman)
- Lightspeed POS Menu - Merchant Biz Ref ID: Lightspeed POS Biz ID (Can be sourced via the HomePage URL or Postman)
- Lightspeed POS Menu - Accounting Groups to skip: Accounting Group ID - Use UrbanPiper Accounting Group (Can be sourced via the Accounting Group URL or Postman)
- Pull Specific Menu: If enabled, pulls only the Specified Menu using Group Names and Categories
- Use Lightspeed Internal Names: If enabled, Orderides Lightspeed Internal Names to Item Name on UrbanPiper.

Please note: Automation for this process is under development

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Uber Eats

- Getting started
- Update and publish your menu
- Update menu timings
- Handling Discounts and Promotions
- Manage order prep time

Getting started

With UrbanPiper's integration, you can **seamlessly receive orders from your Uber Eats account** and automatically push them **to your POS system**. The integration also allows for **centralized menu management**, enabling real-time updates across platforms.

How It Works

1. A **customer places an order** on Uber Eats.
2. The order appears on your **Uber Eats tablet** for manual or **automatic acceptance**
3. Once accepted:
    a. The order is sent to **UrbanPiper**.
    b. The order is then pushed to your **POS** or **UrbanPiper Store Manager.**

Menu Management

UrbanPiper allows you to manage and sync your Uber Eats menu efficiently.

Elements sent to Uber Eats with a Menu Push:

- Product name
- Product snooze (out-of-stock)
- Prices
- Modifier groups/options
- Modifiers/options
- Product images*
- Descriptions
- Menu availabilities (≠ restaurant opening times)
- Product tags (limit applies)

⏱ **Menu updates may take up to 5 minutes** to reflect on Uber Eats.

🎨 *Note: Banner images cannot be updated via UrbanPiper. Contact your Uber Eats account manager or Uber Eats support for manual changes.*

When You Need to Push the Menu

- After **any changes** to the menu
- When **menu availabilities** are updated

When You Do NOT Need to Push the Menu

- When a **product is** marked out of stock

Order Management

The following order data is sent from Uber Eats to UrbanPiper:

- Order details
- Pick-up time
- Order notes
- Delivery fees
- Customer information
  - *(Customer address is shared only when you handle delivery yourself)*

Update and publish your menu

UrbanPiper integrations allow you to manage your menu content centrally for all ordering channels.

If your menu is managed on your POS, please update the menu on UrbanPiper by pulling the menu from the POS.

Once the menu is updated on UrbanPiper, you can publish the changes to Uber Eats by performing a menu publishing to Uber Eats.

{% hint style="warning" %} You need to ensure that opening hours for your store are configured on Atlas before publishing your menu to Uber Eats. {% endhint %}

Update menu timings

UrbanPiper integrations enable you to update and manage your restaurant's operating hours directly from the platform.

To set or modify your restaurant timings, navigate to the [schedules]option available in the UrbanPiper Business Manager.

Once you’ve added the schedule for your location, you can [publish the changes] to Ubeats by performing a menu publish action.

In case you have any further discrepancies even after the above steps, feel free to contact our support team for further assistance.

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Handling Discounts and Promotions

Setting Up Promotions

To explore promotional options such as:

- **Buy One Get One Free**
- **Free Delivery**
- **Percentage Discounts (e.g., 10% Off)**
- **Free Item on Minimum Spend (e.g., Free Drink over £X)**

We recommend discussing these directly with your **Uber Eats Account Manager**. They can guide you on eligibility, setup, and best practices.

💡 *Uber Eats may also run city-wide or national campaigns and invite select restaurants to participate.*

How Promotions Are Handled in UrbanPiper

When a **discount is applied on Uber Eats**, the discounted amount needs to be **reflected in the order data received by UrbanPiper** and further pushed to your **POS system**.

Important Notes:

- The **Discount Total** field in UrbanPiper will show the total discount applied to the order.
- Some POS systems require a **dedicated discount product** to process this correctly.
- Before setting up any promotion on Uber Eats, please **contact the UrbanPiper support team** to:
    - Confirm your POS compatibility.
    - Ensure discount data is configured and transmitted accurately.

Manage order prep time

You can set and manage your **Normal** and **Busy** prep times directly in Atlas, helping you better align with kitchen operations and improve customer experience.

Getting Started

Follow these steps to set up your prep times:

1. **Log in** to your Atlas account.
2. Navigate to:

Settings → Platforms → Automations Tab → Food Preparation Time

3. Enter your desired:
    a. **Normal Prep Time**
    b. **Busy Prep Time**

&#xNAN;*(Note: Busy time must be **greater** than the normal prep time.)*

4. Select the appropriate level to apply these settings:
    a. **Location level** or
    b. Business level
5. Click **Save and Sync** to push the prep times to **Uber Eats**.

{% hint style="info" %}

Important Notes

- The **active prep time mode (Normal or Busy)** is controlled from **Prime** — not Atlas.
- Atlas is used **only for configuring and syncing** prep time values.
- **Changing prep time does not require a menu publish**. However, after updating, you **must click "Save and Sync"** for changes to reflect. {% endhint %}

This gives you more flexibility and control over your order flow during peak and non-peak hours.

Reach out to our support team for further clarification.

Zomato

- Getting started
- Manage Your Zomato Orders Seamlessly with UrbanPiper
- Update and publish your menu
- Add/update the Category timings
- Add/Update Store Timings
- Create and Manage Taxes
- Create and Manage Charges
- Configuring Discounts with UrbanPiper
- Common Store Availability Issue for Zomato

Getting started

With UrbanPiper's integration, you can seamlessly receive orders from your Zomato and automatically push them to your POS system or UrbanPiper Store Manager. The integration also allows for centralised menu management, enabling real-time updates across platforms.

How It Works

- A customer places an order on Zomato.
- The order is sent to UrbanPiper.
- The order is then pushed to your POS or UrbanPiper Store Manager.

Menu Management

UrbanPiper allows you to manage and sync your Zomato menu efficiently.

Elements sent to Zomato with a Menu Push:

- Product name
- Product snooze (out-of-stock)
- Prices
- Modifier groups/options
- Modifiers/options
- Product images*
- Product Descriptions
- Tax
- Charges
- Product availabilities (≠ restaurant opening times)\

{% hint style="info" %} ⏱️ When succesfully published ,the menu updates may take up to 5-10 minutes to reflect on Zomato. {% endhint %}

When You Need to Push the Menu

- After any changes to the menu
- When menu availabilities are updated

When You Do NOT Need to Push the Menu

- When a product is marked out of stock/ In stock

Order Management

The following order data is sent from Zomato to UrbanPiper:

- Order details
- Pick-up time
- Order notes
- Delivery fees
- Order Tax+ charges

{% hint style="info" %} Customer's address is shared only when you handle delivery yourself {% endhint %}

Manage Your Zomato Orders Seamlessly with UrbanPiper

UrbanPiper's integration with Zomato empowers you to streamline your online order management, reduce manual effort, and enhance operational efficiency. This document outlines the key features and functionalities supported on the UrbanPiper platform for your Zomato orders.

Key Features Supported on UrbanPiper for Zomato Orders:

Auto-Acceptance	**yes**	**UrbanPiper can automatically accept new Zomato orders as they come in, speeding up your workflow.**
Real-Time Order Push	yes	Orders placed on Zomato are instantly pushed to your UrbanPiper-integrated system, so you're always up-to-date.
Edit Order	no	Orders cannot be edited directly through UrbanPiper. Please use the Zomato partner portal for any modifications.
Order Discount Info	yes	Detailed information about all discounts, including **order-level** and **item-level** discounts, is accurately relayed to your system.
Discount Bifurcation	yes	The breakdown of how discounts are applied is supported, providing complete clarity.
Charge Info	yes	Information regarding various charges, such as delivery and service fees, is accurately transmitted.
Tax Info	yes	All tax details associated with the order are passed through to your system.
Orders with Options	yes	Orders that include items with special options (e.g., toppings, sizes) are fully supported.
Order Status Update	yes	Keep Zomato informed of your order's progress.
Acceptance (UrbanPiper → Zomato)	yes	Confirm order acceptance to Zomato directly from UrbanPiper.

Food Ready (UrbanPiper → Zomato)	yes	Notify Zomato when an order is ready for pickup.
Dispatched (UrbanPiper → Zomato)	yes	Inform Zomato when an order has left your outlet for delivery.
Dispatched (Zomato → UrbanPiper)	no	Rider dispatch status updates from Zomato are not pushed back to UrbanPiper.
Delivered/Completed (UrbanPiper → Zomato)	yes	Mark orders as delivered or completed on Zomato via UrbanPiper.
Delivered/Completed (Zomato → UrbanPiper)	no	Final delivery confirmation from Zomato is not pushed back to UrbanPiper.
Cancellation (UrbanPiper → Zomato)	yes	Initiate order cancellations from UrbanPiper to Zomato (before acknowledgment).
Cancellation (Zomato → UrbanPiper)	yes	Receive notifications in UrbanPiper for orders that were cancelled by Zomato or the customer.
Rider Status Updates	yes	Monitor the key stages of the rider's journey for your orders.
Rider Reassignment	yes	UrbanPiper can reflect when a rider reassignment has occurred for a Zomato order.

Update and publish your menu

UrbanPiper integrations allow you to centrally manage your menu content for all ordering channels.

If your menu is managed on your POS, please ingest the menu from the POS to the UrbanPiper platform. Once the menu is updated on UrbanPiper, you can publish the changes to Zomato by performing a menu publish to Zomato.

Monitor the status of your menu publishing request on Atlas. If any errors occur, refer to the error report, make the necessary corrections, and republish..

Handling errors

Below are the common menu publish error with possible resolution.

Common Menu Publish Errors & Fixes

1. Error:"message":"No Zomato restaurant is mapped with Outlet Id: 16397"

Description: Store is not integrated

Fix: Raise RTGL from your end; onboarding team will pick it up

2. Error:"value":["tags: root item tagged with services must have GST of 5%."]

Description: Tax not configured or incorrectly tagged

Fix: If service item → configure tax; if MRP packaged item → add packaged-good tag

3. Error:"message":"Item Image URL must end with either .png or .jpg or .ashx

Description: Image format not valid

Fix: Use image with .png, .jpg, or .ashx extension

4. Error:"value":["Multiple items with same name not allowed inside a category"]

Description: Duplicate item names in category

Fix: Remove duplicate items

5. Error:"value":["zero price.price 0 at index 0 is not allowed for root catalogues"]

Description: Item price is zero, and no variant is added

Fix: Add price at item level or create a variant

6. Error:{"value":["max should be at least 1"]}

Description: Modifier group has fewer items than minimum selectable

Fix: Reduce minimum selectable or add more modifiers

7. Error:{"value":["tags: GST Unregistered restaurant cannot sell goods."]}

Description: GST not registered with Zomato

Fix: Contact Zomato POC to update GST

8. Error:{"catalogue":{"value":["Empty catalogues list"]}}

Description: Category passed without items

Fix: Add items to category or archive it

9. Error:{"value":["Multiple order level charges not supported"]}

Description: Multiple charges applied

Fix: Keep only one charge

10. Error:["Multiple charges for same service"]

Description: Duplicate charges applied

Fix: Remove duplicates and keep one charge

11. Error:"value":["Same tax group has been applied more than once"]

Description: Multiple taxes applied on the same item

Fix: Keep only one tax group

12. Error:DELIVERY - only interval of 30 minutes is supported

Description: Timing not aligned to 30-min slot

Fix: Set timing groups to .00 or .30 minutes

13. Error:Non-veg items must not contain "veg" item tags

Description: Wrong tagging on non-veg items (e.g., “Vegetarian Chicken”)

Fix: Add “[Veg Preparation]” in description and republish

14. Error:"value": Price cannot be greater than 4000

Description: Item price exceeds limit

Fix: Reduce price or contact Zomato POC

15. Error:If Modifier is not visible in UI

Description: Modifier price is higher than item price

Fix: Ensure item price > modifier price

16. Error:"message":"Data validation failed" ... "MODIFIER_GROUP": ... "Cannot be mapped to catalogue [Cake Name]"

Description: Missing Celebration-Cake tag

Fix: Add tag “Celebration-Cake” and repush

17. Error:Your outlet is not live for online ordering

Description: O2 not enabled

Fix: Contact aggregator POC to enable

18. Error:'Data validation failed' ... 'Invalid value specified'

Description: Modifier name is in decimal/only numbers

Fix: Rename modifier using alphabets (not just numbers)

Add/update the Category timings

{% embed url="https://urbanpiper.portal.trainn.co/share/WhA7D8b4rgFe4OdyqvEBKA" %}

UrbanPiper integrations allow you to update and manage your menu’s category hours directly from the platform.

If you want to sell certain categories only at specific times, you can take advantage of this feature by adding timing to your respective categories.

In this guide, we will walk through the steps to create a category schedule and associate it with a menu category for publishing.

Follow these steps to ensure your menu is published with the correct timings.

Create a New Schedule

- Navigate to the navigation bar.
- Click on "All Apps".
- Select "Schedules".
- Click on "Create a New Schedule".
- Provide a title for your schedule.
- Click on "Next" to proceed.

Add Timings

Here, you can add timings based on your needs. Options include daily, weekdays, weekends, or custom timings.

- Select the desired timing option.
- **Add the timings. Note that timings should be in multiple of 30 minutes**
- If needed, add another timing group.
- Click on "Save" to save your schedule.

Associate Schedule with a Category

- Go to the "Catalog" section.
- Navigate to "Categories".
- Select the desired category to associate the schedule.
- Click on "Associate Category Timing".
- Click on "Save" to confirm the association.

Note: If there are any subcategories under the parent category, you need to assign timings for each subcategory as well. Navigate to the subcategory and associate the timing accordingly.

Publish the Menu

- Once the timing group is correctly associated, proceed to publish the menu.
- Ensure the menu is published on Zomato.
- Click on "Publish".

After successfully publishing the menu, your category timing will be associated as expected.

{% hint style="info" %} Please ensure that the support flag for category schedule is enabled before publishing the menu as shown below. {% endhint %}

Add/Update Store Timings

UrbanPiper integrations allow you to update and manage your restaurant's operating hours directly through the platform.

To set or modify your restaurant's schedule, go to the "Schedules" option available in the UrbanPiper Business Manager. After you have added the schedule for your location, you can sync it with Zomato.

In this guide, we will learn how to create schedules to set the operating hours for a given location. Follow these steps to create and associate schedules effectively.

Navigate to Schedules

- On the navigation section, click on Groups.
- Then, click on Schedules.

Create a New Schedule:

- Click on Regular Schedules and then Create New.
- Enter the name of the schedule.
- Click on Next to proceed.

Add Timings:

- Select the type of schedule: Daily, Weekdays, Weekend, or Custom.
- Select the open and close times.
- You can choose to add further timings if applicable.
- The time should be in from XX:00 or XX:30 only.
- Once the timings are created, click on Save.

Associate Locations:

- Click on Associate Your First Location.
- Select the list of locations you want to associate with the schedule.
- Click on Update to finalize the association.

Note: Any manual override of store availability will disable store timing. The store time will need to be synced again.

Now, the schedule has been successfully created and associated with the selected location. Thank you for following this guide!

If you encounter any discrepancies after following these steps, please feel free to contact our support team for further assistance.

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Create and Manage Taxes

{% embed url="https://urbanpiper.portal.trainn.co/share/zxTlq4W5vd2c03blDiQm0w/" %}

This guide outlines how to set up and manage taxes for your Zomato orders using our platform, ensuring compliance and accurate billing.

Setting Up Taxes

Follow these steps to configure your tax rates:

Access the Catalog:

- From your dashboard, go to the Catalog option.

Navigate to Taxes:

- Select Taxes from the Catalog menu.

Add Tax Rate:

- Click on Add Tax Rate.
- Enter the required information for your tax.
- GST Division: For GST rates like 5%, 9%, 12%, or 18%, the platform will automatically divide the rate equally into SGST and CGST (e.g., 5% GST will become 2.5% SGST and 2.5% CGST).

Select Applicable Modes:

- Choose the modes that will apply the tax to your item prices or charges.

Save Details:

- Fill in all necessary details and click Save.

Create CGST:

- After completing the SGST setup, repeat the same procedure to create the corresponding CGST.

Associating Items and Location Groups with Taxes

By default, all items and location groups are automatically associated with the taxes you create. If you need to limit taxes to specific items or locations, follow these steps:

Create Unique Item and Location Groups:

For Item Groups:

- Go to the All Apps section.
- Select Groups.
- Click on Add Item Group, fill in the details, and click Create.

- Navigate to your items and update them to associate with this newly created item group.

For Location Groups:

- Select the Location Group option on the left-hand side.
- Set up a new location group, fill out the details, and associate the relevant locations by clicking Update.

Update Tax Association:

- Once your unique item and location groups are set up, go back to the Taxes option and refresh the page.
- After the page reloads, select the specific tax rate.
- Navigate to the Items and Location tab within that tax rate's settings.
- Remove any previous default location and item group associations.
- Click on Add New.
- Associate the specific item group with the relevant location group, and then click Add to link them to this tax.

Additional Notes on Tax Liability and Packaged Goods

Understanding tax liability is crucial for accurate billing:

- Tax Rates Above 5%: For any tax rate above 5%, it is considered the Merchant's liability.
- If the tax rate on an item is above 5%, the item must be accompanied by a “packaged goods” tag.
- 5% Tax - Aggregator's Liability (Default): A 5% tax on an item will by default be the aggregator's (Zomato's) liability.
- 5% Tax - Merchant's Liability (with Tag): To make a 5% tax on an item the Merchant’s liability, the item must also be accompanied by a “packaged goods” tag.

Adding "Packaged Goods" Tag

To mark an item as a "packaged good":

Navigate to Items:

- In the Catalog section, go to Items.

Add Tag:

- Select the specific item.
- Click on Show More to reveal additional options.
- Proceed to add the “packaged goods” tag to the item.

Associate with Groups:

- Associate this item with the appropriate item group you created (if not already done).
- Repeat the steps in the "Associating Items and Location Groups with Taxes" section to link this item (via its item group) to the correct tax rate.

Create and Manage Charges

{% embed url="https://urbanpiper.portal.trainn.co/share/9oQWSrypJ94iWrfUH5K9Mw" %}

In this guide, we will walk you through the process of setting up packaging charges for Zomato. Follow the steps below to configure the charges effectively.

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Access the Catalog

1. Select the Catalog option from the menu above.

Navigate to Charges

2. Select the Charges option located on the left-hand side.

Add a New Charge

3. In the top-right corner, click on Add Charge.
4. Fill in the necessary details for the charge.

Choose the Applicable Mode

Below are the modes you can choose from:

- Item Quantity: Based on the quantity of items ordered by the customer.
- Order Subtotal: Based on the order-level packaging charges.
- Item Price: Option to include a percentage-based packaging charge for the items.

Set the Amount and Create the Charge

5. After choosing the appropriate mode, set the amount.
6. Click on Create.

Associate with Items and Location Groups

By default, all items and location groups are linked to the packaging charge. To specify certain items, follow these steps:

Create a New Item Group

1. Go to All Apps and select Group.
2. Click on Add Item Group.
3. Enter the name and click on Create.
4. Click on Items and then Update Items.
5. Select the preferred item to associate with the item group.

Create a New Location Group

1. Click on Add Location Group.
2. Fill in the name and click on Create.
3. Associate the location by clicking on Update and selecting the preferred location.
4. Click on Update Location.

Associate Item and Location Group with the Charge

7. Refresh the page once.
8. Return to Charges and click on Items and Locations.
9. Delete the previous item group and location group associated by default.

10. Click on Add New Pair.
11. Select the newly created item group and location group.
12. Click on Add.

Publish the Menu

To reflect these changes on Zomato, publish the menu for your location.

Thank you for watching!

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Configuring Discounts with UrbanPiper

{% embed url="https://urbanpiper.portal.trainn.co/share/OQot8eWArUiwE2BEjNmKlg" %}

Attracting more customers and increasing order value is key to growing your business. With UrbanPiper's seamless integration with Zomato, setting up attractive discounts is simple and effective!

We support several popular discount types to give you maximum flexibility in your promotions:\

Buy One Get One Free (BOGO)

- When your customer adds one eligible item to their cart, a second identical item is automatically added for free! It's a fantastic way to encourage larger orders.
- Example: Buy 1 Pizza, Get 1 Pizza Free!\

Fixed Discount:

- Offer a set amount off the total bill, usually when a customer spends a certain minimum.
- Example: Get ₹100 off on orders of ₹300 or more!\

Percentage Discount

- Apply a percentage off the total cart value, also typically with a minimum spend condition.
- Example: Enjoy 30% off on orders above ₹200!\

Percentage Dish Discount

- Give a percentage discount on a single specific item that you choose. This applies once per order.
- Example: Get 20% off on our Special Biryani (one per order)!

Step-by-Step Guide: Setting Up a BOGO Discount for Zomato

Ready to run a "Buy One Get One Free" offer? You can easily configure this directly from your UrbanPiper Atlas dashboard!

Create the BOGO Discount

Access the Marketing Tab:

- Log in to your Atlas dashboard.
- On the left-hand menu, click on the "Marketing" tab.

Select Platform Discount:

- Within the Marketing section, choose "Platform Discount."

Add a New Discount:

- Click on the "+ Add Discount" button to start creating your new offer.

Choose Discount Type:

- From the dropdown menu, select "BOGO" (Buy One Get One) as your discount type.

Configure Discount Details:

- Title: Give your discount a clear name (e.g., "BOGO Pizza Offer").
- Start Date & End Date: Set the period when your discount will be active.

- Important: For BOGO, you can ignore the fields for "value," "minimum order value," "timing group," and "single use."

Finalize Creation:

- Click on "Create" to save your new BOGO discount.

Associate the Discount with Your Item

Now, let's link your newly created BOGO discount to the specific menu item it applies to.

Go to the Catalog Section:

- From the left-hand menu, click on "Catalog."
- Select the "Item" Tab.
- Ensure you are on the "Item" tab within the Catalog.

Choose Your Discounted Item:

- Find and click on the specific menu item you wish to offer as "Buy One Get One Free."

Navigate to the "Tag" Tab:

- Within the item's details, click on the "Tag" tab.

Apply the BOGO Tag:

- In the search bar for tags, type "Buy One Get One."
- Select the tag that reads "Offer BOGO Discount for Zomato."

Save Changes:

- Click on "Save" to apply this tag to your item.

Publish Your Menu to Zomato

The final crucial step is to publish your updated menu to Zomato so your discount goes live!

Go to the "Location" Section:

- From the left-hand menu, click on "Location."

Select Your Location:

- Choose the specific restaurant location where this discount should be active.

Click on "Publish."

- You'll see a "Publish" button – click it.

Select Zomato & Publish:

- From the list of platforms, select "Zomato."

Finally, click "Publish."

Once your menu is successfully published, your "Buy One Get One Free" discount will be live on Zomato for the selected item, ready to delight your customers and boost your orders!

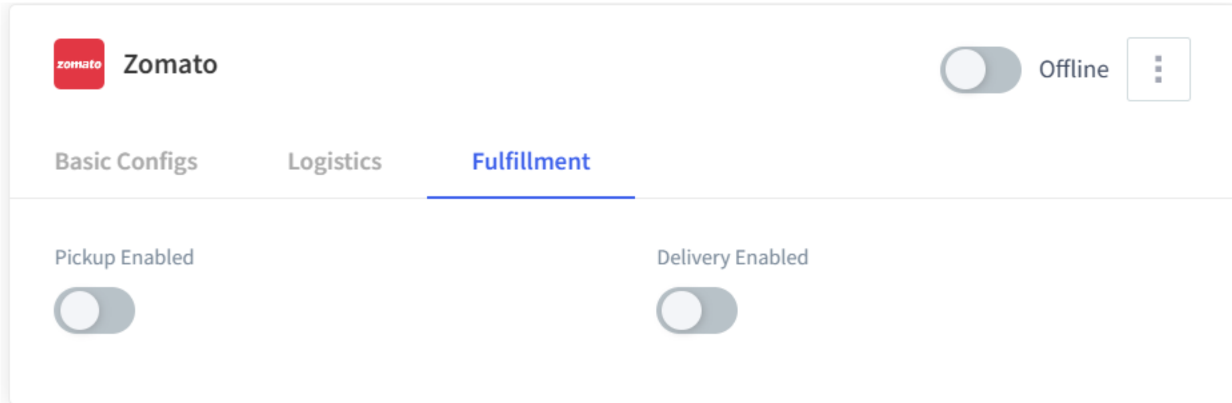
Common Store Availability Issue for Zomato

UrbanPiper allows you to manage the availability of your store directly from the dashboard, including turning the store on or off for Zomato. However, there are a few key factors that may affect whether the store's status updates successfully on Zomato's platform.

Below are the common factors that can impact store availability.

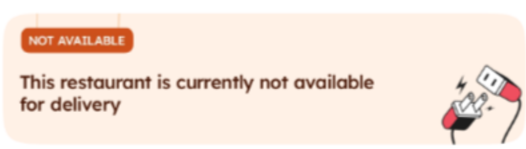
Delivery Enabled Toggle (Under Fulfilment)

- This toggle controls whether delivery is active for your store.
- For newly onboarded stores, it's essential to connect with your Zomato Point of Contact (POC) to ensure this is enabled from Zomato's end.
- Without this toggle being enabled, your store may not appear as available, even if it's active in UrbanPiper.



GST Status – Unregistered

- If you are trying to turn the store on/off and the change appears successful in UrbanPiper but is not reflected on Zomato, it's likely that the GST registration has lapsed or is missing.
- Additionally, if you see the log message "All items are in inactive state" after publishing the menu and the Zomato UI shows "The store is currently unavailable for delivery", this often indicates GST is unregistered.
- In such cases, please reach out to your Zomato POC to verify and resolve the GST status.



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Auto Store Activation After Menu Publish

- When a menu is published, Zomato automatically disables the store for a short period (about 1–2 minutes) and then reenables it.
- However, if the store was already turned off before the menu was published, you will need to manually turn it off again after the publish to retain the desired state.\

Order Rejections Can Trigger Store Closure

- If an order is rejected, Zomato may automatically turn off the store from their end.

- In such cases, please ensure the store is manually turned back on within 4–5 minutes to avoid disruptions in operations or order flow.\

Summary

Managing your store's availability on Zomato via UrbanPiper is easy, but it's important to be aware of the above conditions that may influence store visibility. For any platform-related settings, such as the Delivery toggle or GST registration, your Zomato POC is the best point of contact.

For any issues from the UrbanPiper side, feel free to raise a support request through [UrbanPiper Support]

Getting started

With UrbanPiper's integration, you can seamlessly receive orders from your Swiggy and automatically push them to your POS system or UrbanPiper Store Manager. The integration also allows for centralized menu management, enabling real-time updates across platforms.

How It Works

A customer places an order on Swiggy.
The order is sent to UrbanPiper.
The order is then pushed to your POS or UrbanPiper Store Manager.

Menu Management

UrbanPiper allows you to manage and sync your Swiggy menu efficiently.

Elements sent to Swiggy with a Menu Push:
Product name
Product snooze (out-of-stock)
Prices
Modifier groups/options
Modifiers/options
Product images*
Product Descriptions Tax Charges

Product availabilities (≠ restaurant opening times)

⏱️ Menu updates may take up to 5 minutes to reflect on Swiggy.

When You Need to Push the Menu
After any changes to the menu
When menu availabilities are updated

When You Do NOT Need to Push the Menu
When a product is marked out of stock/ In stock

Order Management

The following order data is sent from Zomato to UrbanPiper:
Order details
Pick-up time
Order notes
Delivery fees Order Tax+ charges
Customer information
(Customer address is shared only when you handle delivery yourself)

Features supported on Urbanpiper

The document below provides a quick reference to the features and functionalities supported by UrbanPiper's integration for Swiggy.

UrbanPiper – Supported Features

Menu

- Real-Time Menu Publish (Store Level): Yes

Category

- Category Sort Order: No
- Sub-Category: Yes
- Category Timing: Yes

- Category Image: No

Item

- Description: Yes
- Sort Order: No
- Location Pricing: Yes
- Image: Yes
- Item-Level Tax: Yes
- Item Charge: Yes
- Recommendation: No

Option Group

- Variant Group: Yes
- Add-on Group: Yes
- Nested Option Group (L1): Yes
- Sort Order: No

Option

- Sort Order: No
- Option Location Price: Yes

Extra

- Order-Level Charges: No
- Offer Configuration: No

Order Relay

- Real-Time Order Push: Yes
- Edit Order Functionality: Yes
- Order Discount Info: Yes
- Order Level Discount: Yes
- Item Level Discount: Yes
- Discount Bifurcation: No

- Charge Info: Yes
- Tax Info: No
- Order with Options: Yes

Additional Functionality

- Real-time Order Status Push to Aggregator: Yes
- Acceptance (UP → Aggregator): Yes
- Food Ready (UP → Aggregator): Yes
- Dispatched (UP → Aggregator): Yes
- Dispatched (Aggregator → UP): Yes
- Delivered/Completed (UP → Aggregator): Yes
- Delivered/Completed (Aggregator → UP): Yes
- Cancellation (UP → Aggregator): Yes
- Cancellation (Aggregator → UP): Yes

Inventory

- Item Inventory Toggle: Yes
- Option Inventory Toggle: Yes
- Item Inventory Snooze: Yes
- Option Inventory Snooze: Yes

Store

- Store Availability: Yes

Additional Functionality

- Auto Acceptance: Yes

Rider Status Update

- Supported Rider Status: Yes
  - Rider Assigned: Yes
  - Rider Arrived: Yes
  - Picked Up: Yes
  - Delivered: Yes
- Rider Reassignment Handled: Yes

Packaging Charges

- Flat – Item Price (slab-wise): Yes
- Percentage – Item Quantity: No
- Percentage – Order Subtotal: No

Platform Discounts Configuration

- No

Swiggy quality check

To improve the overall quality and consistency of menus on the Swiggy platform, Swiggy conducts a Menu Quality Check (QC) on all published menus.

Once the QC is completed and the menu fails:

- Any items failing QC standards are removed from the menu by Swiggy, and menu publishing will be on hold until all errors are fixed
- All subsequent menu updates for the outlet will be applied only after passing QC.

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{% hint style="info" %} Note- Swiggy's quality check will be applied location-wise, so there may be a chance that one business location fails the quality check while another location with the same menu will not be affected. {% endhint %}

Common QC Failures & Resolutions

Packaging Charges Issue

Error Message:

"entity with id : XXXXXXXX was rejected because: Packaging charges Issue (Packaging charges can not be applied beyond the Swiggy Slab)"

Cause:

The packaging charges set for an item are higher than allowed by Swiggy's standard pricing slab.

Resolution:

Configure the packaging charge as per the slab below:

Item Price (₹)	Allowed Packaging Charge (₹)
Less than 50	5
51 – 150	7
151 – 300	10
301 – 500	15
Above 500	20

Important

If you want to set a packaging charge outside the allowed slab, you must get prior approval from your Swiggy POC (Point of Contact).

Without this approval, your menu update will be rejected, and you will see an error message.

Duplicate Category Name

Error Message:

"Category create/update failed with error: [name: Duplicate 'Category' with id XXXXX and name 'Sandwich' found.], Can't proceed to dependent objects"

Cause:

Multiple categories or subcategories with the same name exist (e.g., “Sandwich”).

Resolution:

Ensure that all category, sub-category, and item names are unique. Avoid repetition in names within the same menu structure.

Duplicate Addon Group Name

Error Message:

"[name: Addon group with same name already exists, Cannot update/create addon group.]"

Cause:

There is already an addon group with the same name in the menu.

Resolution:

Change the addon group name to something unique.

If there are multiple (20+) such errors, share the error report with the merchant and guide them on how to rectify each one.

Duplicate Entity Name

Error Message:

"Duplicate entity with same name already exists"

Cause:

This occurs when an existing entity is archived and recreated with the same name, or when an entity is edited and ends up duplicating an existing one.

Resolution:

Try to republish. This often requires menu clearance from Swiggy's end for which kindly reach out to UrbanPiper Support

Improper Formatting (Case Issues)

Cause:

Menu elements are not in the proper case (e.g., all lowercase or all caps).

Resolution:

Follow Swiggy's formatting standards:

- Item, Category, Subcategory, Modifier Group & Modifier Names → Title Case (e.g., Chicken Biryani)
- Connecting Words (with, in, on, etc.) → Lowercase
- Descriptions → Sentence Case (e.g., A spicy rice dish made with chicken and herbs.)

Missing Quantity or Flavour (Cakes)

Error Message:

"entity with third_party_id: XXXXXXXX was rejected because: Cake Quantity/Flavour it is mandatory to update"

Cause:

Cake items are missing quantity and flavour details in the item description.

Resolution:

Update the description to clearly mention both quantity and flavour (e.g., 500g Butterscotch Cake).

Dependent Children Failed to Create/Update

Error Message:

"Dependent Children Failed to Created/Update."

Cause:

This is a system-side failure during menu injection on Swiggy's end.

Resolution:

Try to push the menu again ,if the issue persists please reach out to UrbanPiper Support\

📝 Final Tips

- Always validate item names, descriptions, and structure before publishing.
- Keep all names unique and meaningful.

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For any recurring QC failures, reach out to your Swiggy POC for support.

Update and publish your menu

Keeping your menu accurate and up-to-date across all your online ordering channels is crucial for a smooth operation and happy customers. UrbanPiper's powerful integrations allow you to centrally manage your menu content, saving you time and ensuring consistency!

No more logging into multiple platforms for every small change – manage it all from one place.

How to Update Your Swiggy Menu via UrbanPiper

The process depends on where your primary menu source is.

Option 1: Your Menu is Managed on Your POS System

If your Point-of-Sale (POS) system is your primary source for menu content and updates, here's the flow:

1. Update your menu directly in your POS system.
2. Ingest the Menu to UrbanPiper: Ensure your POS is configured to automatically or manually push (ingest) menu changes from your POS to the UrbanPiper platform. This syncs the latest menu data to your UrbanPiper Atlas dashboard.
3. If you're unsure about this step or facing issues, please refer to your POS integration guide or contact our support team for assistance with POS ingestion.

Option 2: Your Menu is Configured Directly on UrbanPiper Atlas

If you use the UrbanPiper Atlas dashboard to build and manage your menu content:

1. Make your menu changes directly in the "Catalog" section of your Atlas dashboard.
2. Need help with menu configuration in Atlas? Please refer to the "Get Started" section within your Atlas dashboard, or check our Knowledge Base for detailed guides on adding items, categories, pricing, and modifiers.

Final Step: Publishing Your Menu to Swiggy

Once your menu is updated on the UrbanPiper platform (either via POS ingestion or direct Atlas configuration), the final step is to publish these changes to Swiggy:

1. Log in to your UrbanPiper Atlas dashboard.
2. Navigate to the "Location" section from the left-hand menu.
3. Select your specific restaurant location.
4. Click on the "Publish" button.
5. From the list of aggregators, select "Swiggy."
6. Click "Publish" again to confirm.

Your updated menu will now be pushed to Swiggy!

Handling errors

Swiggy – Common Menu Publish Errors & Fixes

1. "Price should be in between 1 to 10000"

- **What It Means:** Item price is not within Swiggy's accepted range.
- **How to Fix:** Ensure item price is between ₹1 and ₹10,000. Reduce if it exceeds ₹10,000.

2. "Item Price cannot be 0 if pricing combination is empty"

- **What It Means:** Item price is set to 0 and no variants are configured.
- **How to Fix:** Either set a price at item level or add at least one variant.

3. "Given restaurant is not correct."

- **What It Means:** Your store isn't integrated with Swiggy yet.
- **How to Fix:** Trigger **RTGL (Ready To Go Live)** from your end. Onboarding team will handle it.

4. "Item Packing Charge cannot be greater than Item Price"

- **What It Means:** Packaging charge is higher than the item price.
- **How to Fix:** Either increase the item price or reduce the packaging charge (PC).

5. "size of variant_combinations in pricing_combinations should be equal to size of variant groups"

- **What It Means:** A variant group added to the item is also nested within another variant.
- **How to Fix:** Review and remove duplicate nested variant groups already added as direct add-ons.

6. "Unable to connect to upstream system. Please try again later."

- **What It Means:** System couldn’t connect with Swiggy’s servers.
- **How to Fix:** Retry after some time. If it keeps failing, contact support.

7. "Addon Max Limit should be in between -1 to 50"

- **What It Means:** Add-on group’s maximum selection exceeds 50.
- **How to Fix:** Set the maximum selectable value between -1 and 50.

8. "Item Image URL must end with either .png or .jpg or .ashx"

- **What It Means:** Image file format is not accepted.
- **How to Fix:** Use item image URLs ending with **.png, .jpg, or .ashx** only.

9. "Proper default dependent details are mandatory in case of multiple variant groups"

- **What It Means:** Some variants are missing nested group configurations.
- **How to Fix:** Either associate the nested variant group with all variants or remove the nested group.

10. "Target server error"

- **What It Means:** Menu push is queued due to multiple pushes or Swiggy server lag.
- **How to Fix:** Wait up to 4 hours before publishing the menu again.

11. "Target server error with duplicate key error."

- **What It Means:** An item and a modifier have the same name, causing conflict.
- **How to Fix:** Change either the item name or modifier name to avoid duplication.

Manage Your Orders Seamlessly with UrbanPiper

UrbanPiper's integration with Swiggy empowers you to streamline your online order management, reduce manual effort, and enhance operational efficiency. This document outlines the key features and functionalities supported on the UrbanPiper platform for your Swiggy orders.

Key Features Supported on UrbanPiper for Swiggy Orders:

Auto Acceptance

Auto Acceptance: ☑

UrbanPiper can automatically accept incoming Swiggy orders, ensuring quicker processing and reducing the need for manual intervention.

Order Relay

UrbanPiper facilitates the smooth flow of order information from Swiggy to your system.

UrbanPiper – Order Handling with Swiggy

Order Relay (Swiggy → UrbanPiper → Your System)

- Real-Time Order Push: Yes
- Edit Order Functionality: Yes
- Order Discount Info: Yes
- Order Level Discount: Yes
- Item Level Discount: Yes
- Discount Bifurcation: No
- Charge Info: Yes
- Tax Info: No
- Order with Options: Yes

Order Status Update (UrbanPiper ↔ Swiggy)

- Real-time Order Status Push to Aggregator: Yes
- Acceptance (UrbanPiper → Aggregator): Yes
- Food Ready (UrbanPiper → Aggregator): Yes
- Dispatched (UrbanPiper → Aggregator): Yes
- Dispatched (Aggregator → UrbanPiper): Yes
- Delivered/Completed (UrbanPiper → Aggregator): Yes
- Delivered/Completed (Aggregator → UrbanPiper): Yes
- Cancellation (UrbanPiper → Aggregator): Yes
- Cancellation (Aggregator → UrbanPiper): Yes

Rider Status Update

Monitor the rider's journey for your Swiggy orders.

Supported Rider Status: yes

UrbanPiper displays key rider status updates for your Swiggy orders:

Rider Assigned: yes

Rider Arrived: yes

PickedUp: yes

Delivered: yes

Rider Reassignment Handled: yes

UrbanPiper can reflect when a rider reassignment occurs for a Swiggy order.

Add/update the Category timings

{% embed url="https://urbanpiper.portal.trainn.co/share/WhA7D8b4rgFe4OdyqvEBKA" %}

UrbanPiper allows you to set specific operating hours for individual menu categories directly from the platform. This is especially useful if you want to offer certain items—like breakfast, lunch specials, or late-night snacks—only during specific time slots.\

What You Can Do:

- Display selected categories only during defined hours.
- Automatically hide/show menu categories based on schedule
- Improve operational efficiency and reduce manual intervention.

How to Set or Modify Category Timings

- Log in to your UrbanPiper Business Manager (Atlas) dashboard.
- Navigate to the Schedules section.
- Choose the category you want to set timings for.
- Add or adjust the available time slots as required.
- Save the changes.
- Repeat the steps for each category that requires different timings, and publish the menu

⚠️ Important Note Before Publishing

Before pushing any menu changes:

- Ensure the Category Schedule flag is enabled for your account.
- Without this flag, scheduled categories may not behave as expected across platforms.

If you're unsure whether this setting is active, please check with your UrbanPiper onboarding/support team.

Getting Started

{% embed url="https://urbanpiper.portal.trainn.co/share/ptf2obMKsnkQAsNeh0tmOQ" %}

The UrbanPiper platform offers a powerful suite of reports designed to give you a clear, data-driven view of your business. By transforming raw order data into actionable insights, these reports help you make smarter decisions, optimize operations, and drive growth.

Exporting Reports on UrbanPiper 📤

The UrbanPiper platform makes it simple to fetch and export the data you need. Follow these steps to get your reports:

- Navigate to the **All Apps** section and select **Central Report**. 🗺️
- You will see a list of all available reports, including **order transactions**, **item-wise transactions**, **item summaries**, and more. 📋

Export Order Transaction Report: 💼

- Click on **Order Transaction Report**.
- Choose a pre-defined time range (**daily**, **yesterday's**, **this week's**, **monthly**) or select a custom date.
- Apply filters to sort by **brand**, **location**, or **aggregator**. You can also choose to select all locations.
- Customize your report by selecting which order statuses you want to display.
- Click **Preview** to view your report, or click the download button to export it directly.
- You can download the report in either **CSV** or **XLSX** formats. 📁

Receive Report by Email: 📧

1. When you're ready to export, select the option to receive the report via email.
2. Enter your email address, choose your preferred format, and click **Send**.
3. A secure link to download the generated report will be sent to your inbox. 🔗

Scheduling Reports ⏰

You can set up a recurring schedule to automatically receive your most important reports.

1. Click on the **Schedule** button and choose the report you want to schedule. 📅
2. Customize the data by selecting a date range and applying filters for brands, locations, platforms, or Meraki channels.
3. Note that the default schedule is set to deliver reports at 8 a.m. for the previous day. At this time, custom delivery times are not available.
4. Once you've set your preferences, click **Confirm and Schedule**.
5. Choose your desired format to finalize the schedule.

You will now receive your scheduled order transaction report in your email every day at 8 a.m. 🚀 This is a great way to start your day with fresh data.

Order Transactions Report

The "Order Transactions Report" provides a detailed view of every online order, enabling you to track sales, understand customer behavior, and manage your operations more effectively.

Each row in this report represents a single order, and each column (or "field") provides specific information about that order.

Let's break down what each piece of data means for your business.

Order Identification & Source

These fields help you identify each order and know where it came from.

ID

- What it is: A unique order ID in UrbanPiper for each order record in our system.
- Why it's useful: Helps you quickly find and reference orders for internal tracking.

Order ref ID

- What it is: The unique order number provided by the online platform (like Swiggy or Zomato).
- Why it's useful: Essential for cross-referencing orders with the aggregator's records if you need to discuss a specific order with their support.

Brand

- What it is: The name of your brand that received the order (useful if you operate multiple brand names).
- Why it's useful: Helps you analyze performance across your different brands.

Brand ID

- What it is: A unique internal code for your brand.
- Why it's useful: For internal tracking of your multi-brand operations.

External Platform ID:

- What it is: Another unique ID assigned to the order by the online platform.
- Why it's useful: Provides an additional reference point for reconciling with the aggregator.

Channel:

- What it is: The specific online platform where the order was placed (e.g., "zomato", "swiggy").
- Why it's useful: Shows you which platforms are generating your sales.

Order Status & Timing

These fields tell you about the order's journey and when it was placed or expected.

Created At

- What it is: The exact date and time when the order was first recorded in the system.
- Why it's useful: Crucial for tracking when orders come in and managing preparation times.\

Order State

- What it is: The current status of the order (e.g., "Completed", "Pending", "Cancelled").
- Why it's useful: Gives you an immediate overview of how orders are progressing.\

Request Delivery Time:

- What it is: The time the customer asked for the order to be delivered.
- Why it's useful: Helps you plan deliveries and meet customer expectations.\

Time Slot Start / Time Slot End:

- What it is: If the customer chose a specific delivery window, these show the start and end times of that slot.
- Why it's useful: Important for managing scheduled orders and optimizing delivery logistics.

Payment & Financials

These are critical fields for understanding the money side of your orders.

Payment Mode

- What it is: How the customer paid (e.g., "payment_gateway" for online payments, "aggregator" if the aggregator collects payment, "COD" for Cash on Delivery).
- Why it's useful: Helps with financial reconciliation and understanding payment preferences.\

Payment Transaction ID:

- What it is: The unique ID for the payment transaction from the payment gateway or aggregator.
- Why it's useful: Essential for matching online payments with your bank statements.\

Coupon applied

- What it is: Indicates if a coupon or promo code was used for the order. It will show "None" if no coupon was applied, or the coupon code itself.
- Why it's useful: Helps you track the effectiveness of your marketing promotions.\

Total Amount

- What it is: The final amount the customer paid for the order, including all items, taxes, and charges, after any discounts.
- How it's calculated: Sub-total Amount + Total Taxes + Charges - Discount
- Why it's useful: This is the full amount the customer was charged.\

Merchant Total

- What it is: The amount your restaurant is expected to receive from the order, after aggregator discounts but before aggregator commissions.
- How it's calculated: Sub-total Amount + Charges + Merchant Taxes - Merchant Discount
- Why it's useful: This is a key figure for understanding your gross revenue from each order before aggregator fees.\

Sub-total Amount

- What it is: The total price of the items in the order before any discounts, taxes, or extra charges are added.
- How it's calculated: This is typically the sum of (Quantity × Unit Price) for all items. (You would usually find individual item quantities and prices in a separate 'Item-wise Transaction Report'.)
- Why it's useful: Shows the raw value of the food/items sold.\

Discount

- What it is: The total amount of all discounts applied to the order.
- How it's calculated: This is the sum of Aggregator Discount + Merchant Discount.
- Why it's useful: Helps you see the overall impact of promotions.\

Aggregator Discount

- What it is: The part of the discount that was funded by the online platform (aggregator).
- Why it's useful: Helps you understand who is covering the cost of promotions.\

Merchant Discount

- What it is: The part of the discount that was funded by your restaurant.
- Why it's useful: Directly shows the cost of your own promotions.\

Merchant Taxes

- What it is: Taxes that your restaurant is responsible for collecting and remitting.
- Why it's useful: For your tax reconciliation.\

Total Taxes

- What it is: The full amount of all taxes applied to the order.
- Why it's useful: Provides a complete overview of taxes on the order.\

Charges

- What it is: Any extra fees added to the order (e.g., delivery charges if you collect them, packaging fees).
- Why it's useful: Helps you understand additional revenue streams or costs passed to the customer.\

Wallet credit amount

- What it is: The amount of the order paid using wallet credits (e.g., Swiggy Money, Zomato Wallet).
- Why it's useful: For payment reconciliation, especially with aggregator-specific wallet systems.

Customer & Store Details

These fields provide information about the customer and your store location. Please note that customer details are suggested to the information passed by DSP. Most of the DSP/Aggregators do not share the customer details. Data might be dummy.\

Customer Name

- What it is: The name of the customer who placed the order.
- Why it's useful: For customer service and understanding your customer base.\

Customer ID

- What it is: A unique code for the customer on the online platform.
- Why it's useful: Helps track repeat customers (though often masked by aggregators for privacy).\

Store Name

- What it is: The name of your restaurant location that fulfilled this order.
- Why it's useful: Essential for businesses with multiple locations to track performance per outlet.\

Store ID

- What it is: A unique internal code for your store location.
- Why it's useful: For internal tracking of your multi-location operations.\

Store ref ID

- What it is: The unique identifier for your store on the external ordering platform.
- Why it's useful: For cross-referencing your store details with the aggregator.\

City

- What it is: The city where the order was placed or delivered.
- Why it's useful: For geographical sales analysis.

Fulfillment Details

These fields explain how the order reached the customer.

Fulfillment mode

- What it is: How the order was completed (e.g., "delivery", "pickup", "dine-in").
- Why it's useful: Helps you understand how customers prefer to receive their orders.\

Delivery Type

- What it is: Specifies who handled the delivery (e.g., "Partner" for the aggregator's delivery fleet, "Self" for your own delivery staff).
- Why it's useful: Crucial for managing your delivery logistics and costs.

This "Order Transactions Report" is a powerful report for gaining insights into your online business. By understanding each field, you can make more informed decisions to grow your restaurant!

Order Status Transitions Report

rider'sThe "Order Status Transitions Report" is a report for understanding the entire journey of every order. It's like a time-stamped log that helps you measure your operational efficiency, find bottlenecks, and understand the real reasons behind cancellations.

This guide explains each field in the report, helping you track an order's lifecycle and gain valuable insights into your business's performance.

Order Identification & Source

These fields help you identify each order and where it came from.

Order ID

- What it is: A unique number for each order in your system.
- Why it's useful: It's your main key for tracking and referencing specific orders for internal purposes and troubleshooting.

Brand & Brand ID

- What it is: The name and unique internal code for your brand.
- Why it's useful: In a multi-brand operation, these fields are essential for segmenting your data and analyzing brand performance.

Channel

- What it is: The specific online platform where the order was placed (e.g., "Zomato").
- Why it's useful: Shows you which platforms are generating your sales and how efficiently each channel performs.

Store Name

- What it is: The name of your restaurant location that fulfilled the order.
- Why it's useful: Essential for businesses with multiple locations to track performance per outlet, especially for metrics like preparation time.

Aggregator Order ID

- What it is: The unique order number provided by the online platform (aggregator).
- Why it's useful: This is crucial for cross-referencing orders with the aggregator's records if you need to talk to their support team.

Fulfillment mode

- What it is: How the order was completed (e.g., "delivery," "pickup").
- Why it's useful: Helps you understand how customers prefer to receive their orders and segment your operational data based on fulfillment type.

Order Lifecycle & Timings

These fields provide a clear timeline of key events, which are critical for measuring your operational efficiency.

Order Creation Time

- What it is: The exact date and time the order was first created in your system.
- Why it's useful: This is the starting point for all other time-based metrics.

Placed Time

- What it is: The time when the order was successfully placed on the aggregator's platform.
- Why it's useful: The time between "Order Creation Time" and "Placed Time" can reveal delays in order processing.

Order Auto-Ack Time

- What it is: The time when the order was automatically acknowledged by your system.
- Why it's useful: This marks the beginning of the order's journey in your kitchen and is a key metric for measuring system automation.

Order Ack Time

- What it is: The time a person manually acknowledged the order.
- Why it's useful: If used, this indicates how long it took for a human to review and accept an order.

MFR Time

- What it is: The "Made For Rider" or "Made For Ready" time. This is the timestamp when the food was prepared and ready for pickup.
- Why it's useful: This is a crucial metric for measuring your kitchen's efficiency and how quickly your team can prepare an order.

Dispatch Time

- What it is: The time the delivery rider picked up the order.
- Why it's useful: The time between "MFR Time" and "Dispatch Time" shows the rider wait time. A long wait time could indicate operational issues with the delivery partner.

Order Completion Time

- What it is: The final timestamp when the order was marked as completed in your system.
- Why it's useful: This marks the end of the order's lifecycle and is used to calculate the total time taken for an order.

Cancellation Details

These fields provide important information if an order was cancelled.

Order Cancelled Time

- What it is: The specific date and time when the order was cancelled.
- Why it's useful: A value here indicates that the order did not complete successfully.

Order Cancelled By

- What it is: Indicates who initiated the cancellation (e.g., "customer," "aggregator," "store").
- Why it's useful: This helps you understand the root cause of cancellations, which is crucial for reducing them in the future.

Order Cancel Reason

- What it is: The reason provided for the cancellation.
- Why it's useful: Provides specific insights into why an order was cancelled, allowing you to address issues like long wait times or out-of-stock items.

This "Order Status Transitions Report" gives you a clear picture of how efficiently your business is running. By using these fields, you can pinpoint areas for improvement and ensure a smoother experience for your customers!

Item-wise Order Transactions Report

The "Item-wise Order Transactions Report" is a powerful report that gives you a detailed look at every single item sold in your online orders. By understanding each column, you can unlock valuable insights to optimize your menu, track bestsellers, and improve your business.

This guide will walk you through each field, explaining its purpose and how you can use the data to make smarter business decisions.

Order and Item Identification

These fields are your keys to tracking every transaction.

Order ID

- What it is: A unique number for each order in your system. All items from the same order will share this ID.

- Why it's useful: This is your primary way to internally track and manage a specific order from start to finish.

Order ref ID & Aggregator Order ID

- What it is: The unique order numbers assigned by the online platforms (like Swiggy or Zomato).
- Why it's useful: Use these IDs whenever you need to talk to the aggregator's support team about a specific order.

Item ID & Item ref ID

- What it is: The unique codes for your specific menu item within your system and on the aggregator's platform.
- Why it's useful: These allow you to track the performance of individual products, identify bestsellers, and manage your inventory.

Item Name

- What it is: The name of the product that was ordered by the customer.
- Why it's useful: Gives you a clear, at-a-glance view of what's being sold.

General Order Information

These fields provide a high-level overview of the entire order.

Brand & Brand ID

- What it is: The name and internal code of your brand.
- Why it's useful: If you have multiple brands, this helps you analyze performance for each one separately. (For single-brand reports, these may show as "None.")

Channel

- What it is: The specific online platform where the order was placed (e.g., "zomato").
- Why it's useful: Helps you understand which platforms are driving the most sales for your restaurant.

Order State

- What it is: The status of the order (e.g., "Completed," "Cancelled").
- Why it's useful: Essential for filtering your sales data to only see successfully completed orders.

Store

- What it is: The name of your restaurant location that fulfilled the order.
- Why it's useful: Crucial for businesses with multiple locations to see which store is performing best.

Order date-time

- What it is: The exact date and time the order was created.
- Why it's useful: Perfect for analyzing sales trends over time, like finding your busiest days or peak hours.

City

- What it is: The city where the order was placed.
- Why it's useful: Helps you understand your sales by geographic location.

Financials and Item Details

This is where you get into the numbers for each item.

Quantity

- What it is: How many units of this specific item were ordered.
- Why it's useful: Allows you to calculate the subtotal for each item and see popular ordering patterns.

Unit Price

- What it is: The base price of one unit of the item before any taxes or discounts.
- Why it's useful: Provides the foundation for all financial calculations.

Total Taxes

- What it is: The total tax amount applied specifically to this item.
- Why it's useful: For tax reconciliation and understanding your tax liabilities.

Total Charges

- What it is: Any extra fees applied to this item (e.g., packaging or customization charges).
- Why it's useful: Helps you track additional revenue from specific item charges.

Total Price

- What it is: The final amount the customer paid for this single item, including discounts, taxes, and charges.
- Why it's useful: This is the bottom-line revenue you made from this item in the order.
- Total Price = Quantity × Unit Price + Total Taxes + Total Charges − Coupon Value

Liability On

- What it is: This field indicates who is financially responsible for remitting a specific amount (like taxes).
- Why it's useful: It's a key detail for your accounting, confirming whether you or the aggregator are responsible for paying certain amounts to the government.

Options & option_ids

- What it is: The customizations or add-ons chosen by the customer (e.g., "extra cheese," "no onions") and their unique codes.
- Why it's useful: Gives you valuable insight into customer preferences and can help you create new menu items or promotions based on popular add-ons.

Coupon applied & Coupon value

- What it is: The name and monetary value of any coupon applied to this item.
- Why it's useful: Helps you measure the direct cost and effectiveness of your promotions on a per-item basis.

This "Item-wise Order Transactions Report" is a powerful tool for gaining granular insights into your online business. By understanding each field, you can make more informed decisions to optimize your menu, promotions, and operations!

Items Summary Across All Locations Report

The "Items Summary Across All Locations Report" is your go-to document! Unlike detailed transaction reports, this report gives you a high-level overview of your product performance, consolidating all the data from every location into one simple view.

This guide explains each field in the report, helping you quickly identify your top performers, understand their profitability, and make smarter decisions for your menu.

Item Identification

These fields are how you identify each unique menu item in your report.

Item ID

- What it is: The unique code for this specific menu item within your system.
- Why it's useful: This is your primary key for tracking the performance of each product. Use this ID for all internal analysis and menu management.

Item Name

- What it is: The name of the product as it appears on your menu.
- Why it's useful: Provides a clear, human-readable name for each item, making it easy to identify bestsellers at a glance.

Item ref ID

- What it is: The unique code for the item as it exists on the online platform (like Swiggy or Zomato).
- Why it's useful: This allows you to cross-reference the item with the aggregator's system for any reconciliation or catalog management tasks.

Consolidated Financials

These fields provide a powerful summary of your financial performance for each item, aggregated from all your locations.

Total Quantity

- What it is: The total number of units of this item sold across all orders and all locations during the report period.
- Why it's useful: This is your most important metric for sales volume. It immediately tells you which products are your most popular.

Total Amount

- What it is: The total revenue generated by this item. This includes its base price, taxes, and any extra charges.
- Why it's useful: This number shows the overall financial contribution of each menu item to your business.

Total Taxes

- What it is: The total amount of taxes collected from the sale of this item.
- Why it's useful: Essential for your accounting and tax reconciliation.

Total Charges

- What it is: The total amount of any additional fees, like packaging or customization charges, that were applied to this item.
- Why it's useful: Helps you understand any extra revenue streams or costs associated with a product.

This "Items Summary Across All Locations Report" gives you a clear and consolidated view of your product performance. By using these fields, you can quickly identify your top-performing items and make strategic decisions for your menu and promotions!

Option-wise Order Transactions Report

The "Option-wise Order Transactions Report" is a highly detailed report that gives you a breakdown of every single customization, add-on/Variant, and option chosen for each item in an online order.

By using this report, you can analyze customer preferences, track the performance of your add-ons/variant, and optimize your menu and pricing. This guide will help you gain granular insights into what your customers truly love and are willing to pay extra for.

General Order Information

These fields provide the essential context for the entire order, just like in your other reports.

Order ID

- What it is: The unique number for each order. All options and items belonging to the same order share this ID.
- Why it's useful: It's your primary key for finding all associated details for a specific order.

Order date-time

- What it is: The exact date and time the order was placed.
- Why it's useful: Crucial for analyzing daily sales trends, finding peak ordering times, and managing preparation timelines.

Order State

- What it is: The current status of the order (e.g., "Completed," "Cancelled").
- Why it's useful: Helps you filter out incomplete or cancelled orders for accurate sales analysis.

Order Channel

- What it is: The online platform where the order was placed (e.g., "zomato").
- Why it's useful: Shows which platforms are driving your business and helps you compare performance across channels.

Store ID & Store Name

- What it is: The unique code and name of the store that fulfilled the order.
- Why it's useful: This allows you to analyze sales and popular options for each of your restaurant locations.

Item Details

These fields provide information about the main menu item that was customized.

Item ID & Item Title

- What it is: The unique code and name of the main menu item (e.g., "Keema Pav (Mutton)").
- Why it's useful: This tells you which core product the customer is customizing.

Item Quantity & Item Price

- What it is: The number of units of the main item ordered and its base price before any options were added.
- Why it's useful: This is the starting point for calculating the total cost of the item.

Option Details

This is the most important section of the report, giving you the detailed breakdown of each customization.

Option Ref ID & Option ID

- What it is: The unique code for the option on the aggregator's system and within your own system.

- Why it's useful: These allow you to track which individual customizations are the most popular and profitable.

Option Title

- What it is: The name of the customization or add-on (e.g., "Mango Lassi (200 ML)," "1 PC Extra Bhatura," "No Achaar").
- Why it's useful: This clearly shows what the customer chose to add or modify.

Option Price

- What it is: The cost of a single unit of the option.
- Why it's useful: Helps you understand which options generate additional revenue and which are simple modifications with no added cost.

Option Quantity

- What it is: The number of units of this specific option that were selected.
- Why it's useful: Crucial for calculating the total cost of all options for an item.

Option Group ID

- What it is: The unique code for the category of options this customization belongs to (e.g., a group for sauces, drinks, or spice levels).
- Why it's useful: Allows you to analyze which categories of options are the most popular with your customers.
- This "Option-wise Order Transactions Report" is a treasure trove of information about your customers' preferences. By using these fields, you can make informed decisions to refine your menu and improve the customer experience!

Menu Snapshot Across All Locations Report

The "Menu Snapshot Across All Locations Report" is an essential report for managing your menu. It provides a static, one-time view of all your menu items, showing their pricing, availability, and categorization across every one of your restaurant locations.

This guide explains each field in the report, giving you the clarity you need to ensure consistency and make informed decisions about your menu and pricing strategy.

Item Identification & Categorization

These fields help you easily identify and organize each unique item on your menu.

Item ID

- What it is: A unique code for this specific menu item in your internal system.
- Why it's useful: This is your primary key for tracking the item's details and performance across all platforms.

Item Ref ID

- What it is: The unique code for the item as it exists on the online ordering platform (aggregator).
- Why it's useful: Allows you to quickly cross-reference the item with the aggregator's catalog for any updates or reconciliation.

Item Title

- What it is: The name of the item as it appears on your menu.
- Why it's useful: Provides a clear, human-readable name for each item.

Item Category

- What it is: The menu category the item belongs to (e.g., "Pizzas," "Tandoori Veg Starters").
- Why it's useful: Essential for organizing your menu and for analyzing which categories are most popular.

Pricing & Availability

These fields provide crucial details about the item's cost and stock status.

In-stock

- What it is: A simple indicator of whether the item is available for order. A value of "1" means it's in stock.
- Why it's useful: This helps you quickly see which items are active and ready for sale across your different stores.

Price

- What it is: The base price of the item in your internal system.
- Why it's useful: This is your core pricing reference point for each item.

Aggregator Price

- What it is: The price of the item as it is listed on the online ordering platform.
- Why it's useful: Allows you to compare your internal pricing with the prices that are displayed to customers on aggregator apps.

Store Details

These fields connect each item to the specific store that offers it.

Store ID & Store Ref ID

- What it is: The unique codes for your store location in your internal system and on the external ordering platform.
- Why it's useful: Essential for businesses with multiple locations to track menu items and pricing on a per-store basis.

Store Name

- What it is: The name of your restaurant location that offers this menu item.
- Why it's useful: Provides a clear, human-readable name for each store.

Brand Name

- What it is: The name of your brand that offers the item.

- Why it's useful: In a multi-brand operation, this field would be essential for segmenting your data by brand.

This "Menu Snapshot Across All Locations Report" is your go-to resource for a consolidated view of your menu. By using these fields, you can ensure consistency across all your locations, manage item availability, and maintain an effective pricing strategy.

Store Action Report

The "Store Action Report" is your detailed report for every operational change made to your stores. Think of it as a security log that helps you audit actions, understand a store's history, and troubleshoot issues with confidence.

This guide explains each field in the report, helping you track who did what, when, and on which online platform.

Store & Brand Identification

These fields help you pinpoint the exact store and brand that an action was performed on.

Brand & Brand ID

- What it is: The name and unique internal code for your brand.
- Why it's useful: If you have a multi-brand setup, this is crucial for filtering actions by brand.

store_id & ref_id

- What it is: The unique internal code (`store_id`) and the unique external ID (`ref_id`) for your store on the aggregator platform.
- Why it's useful: These are your primary keys for identifying the store in both your internal and external systems.

store

- What it is: The name of your restaurant location where the action was performed.

- Why it's useful: Provides a clear, human-readable name for the store, making it easy to see which location was affected.

Action Details

These fields give you the specifics of the action that was performed.

action_time

- What it is: The exact date and time the action occurred.
- Why it's useful: This is the most critical field for auditing. It creates a historical timeline of all changes, which is vital for troubleshooting.

platform

- What it is: The specific online platform or channel where the action took place (e.g., "zomato," "Growthfalcons").
- Why it's useful: Helps you track which platforms are being managed and if there are any platform-specific issues.

action_performed

- What it is: The specific action that was taken (e.g., "publish," "enable," "disable").
- Why it's useful: This tells you exactly what was done to your store's status.

application_src

- What it is: The source of the action, such as an API call, a user in the UI, or an internal system.
- Why it's useful: Provides context on how the action was initiated, which is valuable for security and troubleshooting.

status

- What it is: The result of the action (e.g., "ack_success," which means the action was successfully acknowledged).
- Why it's useful: Indicates whether the action was completed successfully or if it failed.

User Details

These fields tell you who or what performed the action.

username

- What it is: The username of the person or system account that performed the action.
- Why it's useful: Essential for accountability and security.

user_first_last_name

- What it is: The full name of the user who performed the action.
- Why it's useful: Provides a human-readable name for auditing and understanding who is responsible for a particular change.

This "Store Action Report" is a valuable record of all operational changes. By using these fields, you can audit your processes, ensure accountability, and troubleshoot any store-level issues with confidence!

Getting started

What Is Meraki?

Meraki is UrbanPiper's self-branded, commission-free online ordering platform for restaurants. It allows you to build and launch your own website and mobile app—complete with customizable menus, discounts, analytics, and marketing tools—without relying on third-party aggregators.

Why choose Meraki?

- **No commission fees**: Keep more revenue by owning the order flow.
- **Full brand control**: Tailor store design, menus, and customer experience under your own identity.
- **Valuable customer insights**: Access customer and order data, enabling loyalty programs and marketing automation (email, SMS, social).

Configuring a Custom Domain

Configuring your DNS records might sound technical, but it's a crucial step to ensure your customers can find your website at the correct address.

This guide will walk you through the process of setting up your custom domain with a few commonly used domain providers.

Steps to Configure

- **Log in to Atlas**
  - Go to the Atlas Dashboard and log in with your admin credentials.
- **Open Meraki Editor**
  - From the left menu, select **Meraki → Editor**.
- **Add a Custom Domain**
  - Navigate to the **Domain** section.
  - Click **Add Custom Domain**.
  - Enter your desired domain name (e.g., `order.yourbrand.com`).
- **Get DNS Records**
  - After entering the domain, Atlas will generate the required **DNS records**.

Each record will include:

  - **Name**
  - **Type** (CNAME, A, etc.)
  - **Value**
- **Update Your DNS Provider**
  - Log in to your DNS provider's portal (e.g., GoDaddy, NameCheap).
  - Add the DNS records exactly as shown in Atlas.
  - Save and apply the changes.
- **Verify Setup**
  - Return to Atlas → Domain section.
  - Once DNS records propagate (can take up to 24–48 hours), your domain will be verified and connected.

{% hint style="warning" %}

- Ensure you only add the records provided in Atlas.
- DNS propagation time varies depending on your provider. {% endhint %}

Please refer to your DNS provider's help portals for detailed steps on configuring the above records.

GoDaddy

NameCheap

Hostinger\

DIRECT ORDERING

Configuring Payment Gateway

You can configure payment gateways on Meraki to enable online payments for your customers. Multiple payment methods, such as credit/debit cards, UPI, wallets, and COD, can be supported depending on the gateway

Steps to Configure

Login to Atlas

Go to the Atlas Dashboard and log in with your admin credentials.

Navigate to Payment Settings

From the left-hand menu, select **Meraki** → **Payments**.

Add a Payment Gateway

Click **Add Gateway**.
Select your preferred payment gateway from the list (e.g., Stripe, Razorpay, PayU, Paytm, etc.).

Enter Gateway Credentials

Each gateway requires specific credentials (e.g., API Key, Secret Key, Merchant ID).

You can obtain these from your payment gateway provider’s dashboard.

Paste the credentials into the respective fields in Atlas.

Choose Payment Options

Enable/disable the methods you want to accept:

Online Payments (UPI, cards, net banking, wallets)

Cash on Delivery (COD)

Wallets or Loyalty Points (if configured)

Save & Test Configuration

Save your gateway settings.

Perform a test transaction to ensure the integration works correctly.

Notes

Some gateways are region-specific (e.g., Stripe for international, Razorpay/PayU/Paytm for India).

You can configure gateways globally for all outlets, or per outlet if needed.

Ensure your payment provider account is in live mode (not test mode) before going live.

India

- Razorpay → Yes
- PaymentOS → No
- PhonePe → Yes
- Instamojo → Yes
- Paystack → No
- PayTabs → No
- Stripe → Yes
- PaytmBlink → Yes
- PayTabs_V2 → No
- PayULatinAmerica → No
- MercadoPago → No
- FreedomPay → No

MENA

- Razorpay → No
- PaymentOS → Yes
- PhonePe → No
- Instamojo → No
- Paystack → Yes
- PayTabs → Yes
- Stripe → Yes
- PaytmBlink → No
- PayTabs_V2 → Yes
- PayULatinAmerica → No
- MercadoPago → No
- FreedomPay → No

KSA

- Razorpay → No
- PaymentOS → Yes
- PhonePe → No
- Instamojo → No
- Paystack → Yes
- PayTabs → Yes
- Stripe → Yes
- PaytmBlink → No
- PayTabs_V2 → Yes
- PayULatinAmerica → No
- MercadoPago → No
- FreedomPay → No

UK

- Razorpay → No

- PaymentOS → No
- PhonePe → No
- Instamojo → No
- Paystack → Yes
- PayTabs → No
- Stripe → Yes
- PaytmBlink → No
- PayTabs_V2 → No
- PayULatinAmerica → No
- MercadoPago → No
- FreedomPay → Yes

LATAM

- Razorpay → No
- PaymentOS → Yes
- PhonePe → No
- Instamojo → No
- Paystack → No
- PayTabs → No
- Stripe → Yes
- PaytmBlink → No
- PayTabs_V2 → No
- PayULatinAmerica → Yes
- MercadoPago → Yes
- FreedomPay → No

USCAN

- Razorpay → No
- PaymentOS → Yes
- PhonePe → No
- Instamojo → No

- Paystack → No
- PayTabs → No
- Stripe → Yes
- PaytmBlink → No
- PayTabs_V2 → No
- PayULatinAmerica → No
- MercadoPago → No
- FreedomPay → Yes

Google Maps

Google Maps is integrated into multiple parts of your Meraki website to provide location-based services.

Where Google Maps is Used

- **Store Selection**
  - When a customer searches for a location, the system checks if a store is available within the selected radius and assigns it.
  - All available stores are also displayed on a map on the **Store Locator** page.
- **Adding or Updating Customer Address**
  - Customers can search for their address using **autocomplete**.
  - Alternatively, they can drag a pin on the map to select their exact location.
- **Order Success Page**
  - A **static map** is displayed on the order confirmation page.
  - This uses UrbanPiper's internal Maps API key (not the merchant's key).

Prerequisites for Maps to Work

If you are using **your own Google Maps API key**, ensure the following APIs are enabled in your **Google Cloud Platform (GCP) project**:

- **Maps JavaScript API**
- **Places API**

- **Geocoding API**

⚠️ Without these APIs enabled, Maps-related functions on your website will not work.

Troubleshooting Maps Issues

If Maps aren't working on your website:

Step 1: Inspect the Website

- Go to your website's Menu page.
- Right-click → **Inspect**.
- Open the **Network** tab.
- Type `maps` in the filter bar to view Maps-related requests.

Step 2: Test Store Selector

- Open the **Fulfilment Selector** (store selection popup).
- Search for a location.

Step 3: Check for Errors

Look at the network logs and identify common issues:

- **Service not enabled** → Errors mentioning "places not enabled" or "geocode not enabled."
- **Referrer restrictions** → Errors mentioning "referrer" (your domain is missing in the GCP key's allowed list).
- **Billing not enabled** → Errors mentioning "billing" (your GCP project billing setup is incomplete).

📌 Reference: Google Maps API error messages

Configuring Banner Images

The banner **images** are large, prominent visuals displayed on your website or app to attract attention.

They are commonly used for:

- 🔹 **Marketing & Promotions** — showcase offers, discounts, or new launches
- 🔹 **Branding** — display your brand's vibe with logos, slogans, or themed visuals
- 🔹 **Navigation** — guide users to specific sections via sliders or clickable banners

Common Traits of Banner Images

- Wide and horizontal format
- Can include **text overlays** (e.g., *"50% OFF"*, *"Order Now"*)
- Used on **homepages, category headers, sliders, carousels, or in email campaigns**

How to Configure Banner Images in Atlas

- **Upload Image**
  - Go to **Atlas → Meraki → Gallery**.
  - Click **Upload Image**.
- **Assign for Web or App**
  - After uploading, click **Settings** for the image.
  - In the **Image Type** dropdown:
    - Select **Web Banner** or **Mobile Web Banner** for website banners.
    - Select **App Banner** for app banners.
- **Location Group Assignment (Optional)**
  - In **Image Settings → Location Group**, select a location group to display banners only for those outlets.
  - If no location group is selected → the banner will appear for **all locations by default**.

- **Add a Clickable Link (Markup)**
    - In **Markup field**, you can add HTML to hyperlink the banner image to a specific URL.

Example:

```
<div style="display:inline-block; width:100%; padding:19px 105px
58px;">
  <a href="YOUR-WEBSITE-URL"
     style="left:1%; position:absolute; top:1%; width:1000px;
height:200px; padding-right:10px; padding-left:10px;">
  </a>
</div>
```

📌 Note:

- Works only for **Web**.
- For **App banners**, hyperlink requests must be submitted to the UrbanPiper Support Team.
- No need to **publish the menu/site** after adding/editing banners.
- Allow **~5 minutes** for updates to reflect.

Recommended Aspect Ratios

- **Web Banners** → 1.6:1 to 1.8:1
- **Mobile Banners** → 2:2

Setting up Your Own Mask ID for SMS

This guide will help you configure and use a **custom Mask ID** for SMS communications (OTP, order updates, and marketing campaigns) on the UrbanPiper Meraki platform.

Register & Approve SMS Templates on the DLT Portal

- Log in to your **DLT portal** (Vodafone, Jio, Airtel, etc.).
- Create all required **SMS templates** under your registered entity.

- Submit templates for approval.
- Once approved, note down:
    - **Template ID**
    - **PE ID (Principal Entity ID)**

📌 These details are provided by TRAI after approval.

Complete the PE–TM Bonding

To link your entity with UrbanPiper's SMS service provider (**Gupshup**):

- Log in to your DLT portal.
- Bond your **PE ID** (Principal Entity ID) with the following **Gupshup Telemarketer IDs**:

Operator – Gupshup TM ID

- **Vodafone** → [provide ID]
- **Jio** → [provide ID]
- **Airtel** → [provide ID]

📌 This **PE–TM bond is mandatory** before templates can be whitelisted on Gupshup's platform.

Share Approved Templates with UrbanPiper Support

- Once bonding is complete, email support@urbanpiper.com with:
    - Your **PE ID**
    - List of all **approved templates** (with Template IDs)
- UrbanPiper Support will configure the templates in the backend.
- The team will initiate the whitelisting process with Gupshup.

Gupshup Whitelisting

- UrbanPiper Support will coordinate with Gupshup to whitelist your templates.
- Once approved, your **custom Mask ID** will be active.
- You can now send all SMS (OTP, order updates, campaigns) via Meraki using your Mask ID.

Important Reminders

- ✅ **PE–TM bonding is compulsory** before template whitelisting can begin.
- ✅ SMS content **must exactly match** the approved DLT template. Any mismatch can lead to **delivery failures**.
- ✅ Keep your **Template IDs and PE ID** safe — you'll need them for support and future updates.

Configuring Coupons in Meraki

Types of Coupons

Meraki provides two types of discounts you can configure:

1. Cash Discount

- Applies a fixed amount discount on the **order subtotal**.
- Can be targeted to specific customer groups using the **Rules** section.
- Note: Cash discounts apply only to the **total bill before taxes and delivery**, not on specific items.

2. Item/Percentage Discounts

Discounts can be applied either on specific items or across the order subtotal. Two types are available:

a. Item Specific

- Apply a percentage discount on selected items or the subtotal.
- Choose which items the discount should apply to.

b. Buy X Get Y (BXGY) Specific

- Create "Buy X, Get Y Free/Discounted" offers.
- Requires two lists:
    - *Items to Check*: The qualifying items a customer must purchase.

- *Items to Discount*: The items that will be discounted once conditions are met.

Mandatory Coupon Rules

When creating any coupon in Meraki, the following rules must be configured:

1. **Redemption Code**
    a. Must be manually entered.
    b. If left blank, the coupon will not work.
2. **Date & Time Validation**
    a. Always set a start date and an end date/time.
3. **Bulk Coupons**
    a. If bulk coupon generation is used, remove the *Redemption Code* field from the main setup.
    b. Otherwise, the coupon code will appear in the list but will not apply.

Common Use Cases & Configuration Examples

1. BOGO (Buy One Get One Free — Same Item)

Example: Buy 1 Dosa, Get 1 Dosa free

Parameter	Value
Items to Check	Dosa
Items to Discount	Dosa
Number of Items to Check	1
Number of Items to Discount	1
Max No of Discounts	1
Coupon Value	100%

Note: If both check and discount items are the same, the lower-priced one in the cart will be discounted.

2. Buy X Get Y Free (Different Items)

Example: Buy Chicken Biryani, Get Gulab Jamun free

Parameter	Value
Items to Check	Chicken Biryani
Items to Discount	Gulab Jamun
Number of Items to Check	2
Number of Items to Discount	2
Max No of Discounts	2
Coupon Value	100%

Note: Discount applies to the *discount item* (Gulab Jamun in this case).

3. B3G2 (Buy 3 Get 2 Free — Different Items)

Example: Buy 3 Chicken Biryani, Get 1 Gulab Jamun and 1 Coke free

Parameter	Value
Items to Check	Chicken Biryani
Items to Discount	Gulab Jamun, Coke
Number of Items to Check	3
Number of Items to Discount	2
Max No of Discounts	1
Coupon Value	100%

Note: If multiple items are present, the specific discounted items (e.g., Gulab Jamun ₹50 + Coke ₹20) will be covered.

Setting Coupon Value

- For both *Item Specific* and *BXGY Specific* coupons, configure percentage discounts (e.g., 10%, 20%, 50%, 100%).
- For BOGO and free-item promotions, set the coupon value to **100%** for the discount items.

Important Notes

- **Cash Discounts**: Always apply on order subtotal only.
- **Percentage Discounts**: Can be applied to either:
  - Entire order subtotal
  - Specific items, or BXGY setups

Manage Campaigns

With UrbanPiper's Meraki platform, you have the tools to create powerful, personalized campaigns that connect with your customers. The Meraki suite allows you to send dynamic messages across multiple channels, helping you drive engagement, build loyalty, and grow your business.

The Power of Personalized Messages

Meraki's dynamic messaging helps your campaigns stand out. Instead of sending a generic message, you can use placeholders to automatically insert customer-specific information, making every message feel personal and relevant.

Available Placeholders:

- `{{user_name}}` : Inserts the customer's first name. Example – Hi {{user_name}}, a surprise is waiting!
- `{{user_points}}` : Shows the customer's current loyalty points balance. Example – You have {{user_points}} points to redeem.

- `{{user_wallet_balance}}` : Displays the customer's current wallet balance. Example – Your wallet has {{user_wallet_balance}} waiting for you.
- `{{user_phone}}` : Inserts the customer's phone number. Example – Reach out to us at {{user_phone}} if you have questions.
- `{{user_email}}` : Inserts the customer's email address. Example – Your confirmation has been sent to {{user_email}}.

Setting Up Your Campaigns

The Meraki platform supports multiple campaign types, giving you flexibility to reach customers through SMS, email, and push notifications.

SMS Campaigns

SMS campaigns are a direct and effective way to communicate with your customers. To ensure compliance and proper delivery, follow these steps:

1. **Register Templates on DLT** – Get your message templates approved on a DLT portal (Vodafone, Jio, Airtel). Once approved, you will receive a Template ID and a PE ID (Principal Entity ID).
2. **Bond Your Account** – On your DLT portal, bond your PE ID with UrbanPiper's SMS provider, Gupshup, by adding the following Telemarketer (TM) IDs:
    a. GS Digital Technology Private Limited: 1002407114627154
    b. Lotus Transforms Private Limited: 1702157390412895696
    c. Gupshup Technology India Pvt. Ltd.: 120210000037
3. **Share With UrbanPiper** – Email your Template ID and PE ID to the UrbanPiper support team. They will work with Gupshup to whitelist your templates.
4. **Launch Campaign** – Once whitelisted, you can create and launch SMS campaigns directly in the Meraki platform.

Email Campaigns

Email campaigns let you send visually rich and branded content.

Steps to set up:

1. **Design Your Email** – Your email content must be in HTML format. Export your final email as a single HTML file.
2. **Host Images** – Upload your images to Atlas → Meraki → Gallery to get a public URL for each image.
3. **Embed in HTML** – Add these public URLs in the `src` attribute of your images.
4. **Send Test Email** – Always send a test email to yourself before launching to your audience.

Example HTML:

```
<!DOCTYPE html>
<html>
<head>
<title>Campaign Image</title>
</head>
<body>
<img
src="https://cdn.urbanpiper.com/media/gallery_images/2022/12/13/New_Lo
go.png" alt="Campaign Image">
</body>
</html>
```

App Push Notifications

Push notifications allow you to engage with customers who have your app installed.

Steps to set up:

1. **Define Audience and Message** – Decide who you want to target and what you want to say. Only logged-in app users will receive notifications.
2. **Create Campaign** – Within Meraki, create your push notification campaign, set your audience, and write the message content.
3. **Launch** – Send your notification instantly to your app users.