

# Heartland

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# Restaurant

Copying Databases

Rev. 7/2019

## Overview

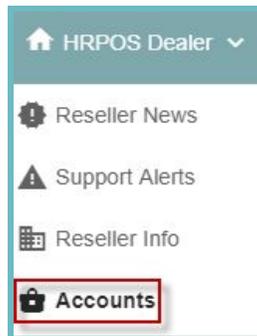
This document details dealer's capabilities to copy their own accounts/locations. If an issue arises where you cannot use the below methods, please contact Heartland Restaurant support.

## How to Copy a Database

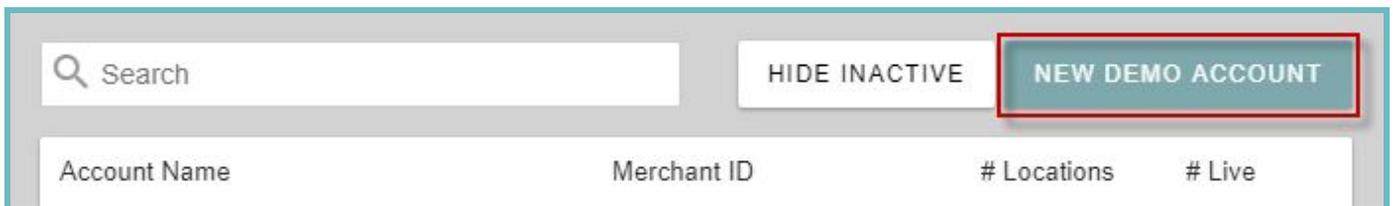
### At Account Creation

Dealers can create new Demo Accounts themselves. When a Demo Account is created, a new Demo Location under that Account is automatically created.

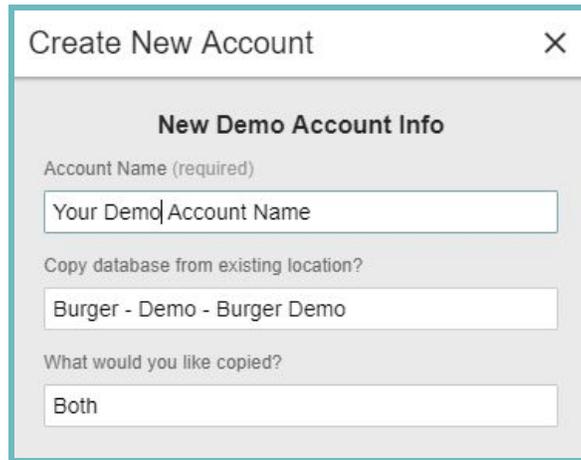
1. Log into the Admin Portal under your **Reseller Account**.
2. Select **Accounts** from the left-handed menu.



3. Select **New Demo Account** at the top right.



4. The **Create New Account** box will appear. Enter the name of the new account in the **Account Name** box.
5. In the **Copy database from existing location** dropdown, select a location to copy information from.
6. Once a location is selected the **What would you like copied** dropdown will appear.
  - a. Your options will be **Setup Only**, **Menu Only**, or **Both**. Select the desired option.



7. When done select the **Checkmark** icon  in the bottom right.
8. Once the copy and creation process completes you will be brought to the newly created **Demo Account**.

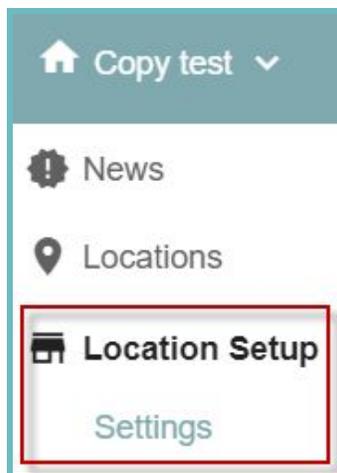
## To a Blank Location

New functionality was recently added to allow dealers to copy to an already existing **blank** Live or Demo location.

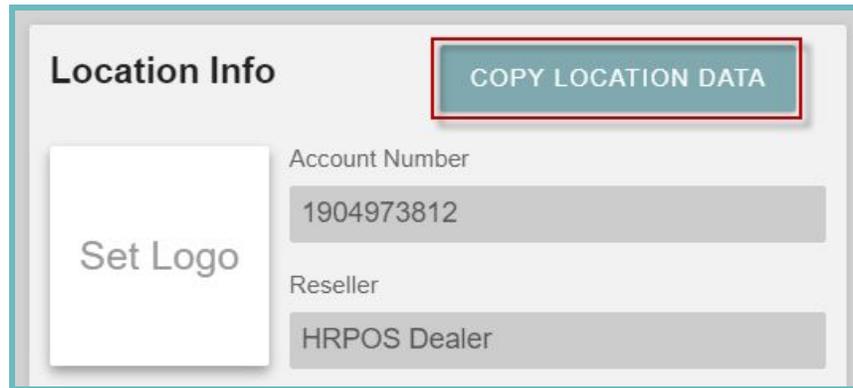
**IMPORTANT:** In order to be considered **blank** the database cannot have any **Staff, Rooms, or Items**. If those are present, it will **not** allow you to do this function to maintain database integrity.

Ensure **ALL Users are deleted** on the database you are **copying information from**.

1. Navigate to the desired blank **Location**. Go to **Location Setup** → **Settings** in the menu on the left.



2. Select the **Copy Location Data** button found at the top right of the **Location Info** section.

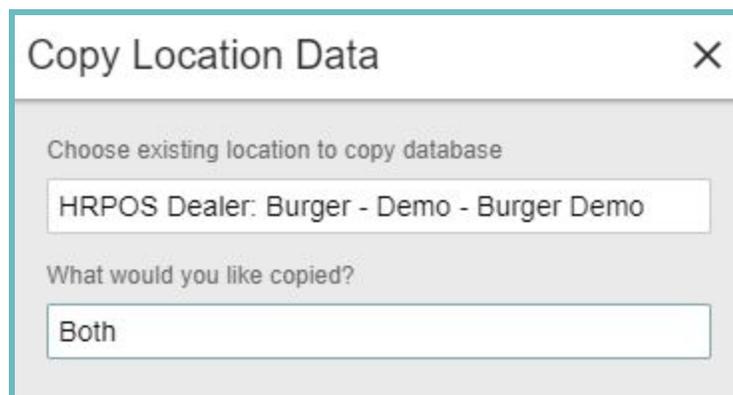


The screenshot shows a 'Location Info' form. On the left is a 'Set Logo' button. To the right are two input fields: 'Account Number' with the value '1904973812' and 'Reseller' with the value 'HRPOS Dealer'. A red-bordered button labeled 'COPY LOCATION DATA' is positioned at the top right of the form.

3. The **Copy Location Data** box will appear. In the **Choose existing location to copy database** dropdown select the location you would like to copy from.

**IMPORTANT:** *If you are copying over to a Multi Location account, make sure the account menu is built to accommodate all locations. As a new location is added to the existing account you can ONLY copy from existing locations WITHIN the account it is nested under.*

4. Once you select a location the **What would you like copied** dropdown will appear.
  - a. Your options will be **Setup Only**, **Menu Only**, or **Both**. Select the desired option.



The screenshot shows a 'Copy Location Data' dialog box with a close button (X) in the top right. It contains two dropdown menus. The first is labeled 'Choose existing location to copy database' and has the selected value 'HRPOS Dealer: Burger - Demo - Burger Demo'. The second is labeled 'What would you like copied?' and has the selected value 'Both'.

5. When done select the **Checkmark** icon  in the bottom right.
6. Once the copy process completes you will now see the information you selected copied over to the location.

### What Will Copy Over?

The following information will copy over respective of the selected settings:

Setup	Menu
<ul style="list-style-type: none"> <li>● Rooms</li> <li>● Customer Tenders</li> <li>● Paid In &amp; Out Types</li> <li>● Payout Apportions</li> <li>● Tip Out Types</li> <li>● Dayparts</li> <li>● Staff</li> <li>● Job Types</li> <li>● Labor Categories</li> <li>● Permissions</li> <li>● Report Access</li> <li>● Break Types</li> <li>● Payment Terminals</li> <li>● Printers</li> <li>● Display Formats</li> <li>● Settings*</li> <li>● Customer Receipt*</li> <li>● Image Library</li> </ul> <p>* Settings and Customer Receipt will <b>ONLY</b> copy over when copying over on <a href="#">Account Creation</a>.</p> <p>They will <b>NOT</b> copy over when using the copy feature within a <a href="#">Blank Location</a>.</p>	<ul style="list-style-type: none"> <li>● Items</li> <li>● Sections</li> <li>● Groups</li> <li>● Sizes</li> <li>● Attributes</li> <li>● Kitchen Groups</li> <li>● Report Categories</li> <li>● Daypart Categories</li> <li>● Revenue Centers</li> <li>● Modifiers</li> <li>● Ingredients</li> <li>● Context Items</li> <li>● Taxes</li> <li>● Tags</li> <li>● Pricing</li> <li>● Discounts</li> <li>● Adjustments</li> <li>● Promotions</li> <li>● Void Reasons</li> </ul>

### What Does Not Copy Over?

The following information will **NEVER** copy over:

- Online Ordering URL
- App Ordering
- Clock In Messages
- Loyalty Setup
- Integrations
- Users