Heartland

Restaurant

Call Center Configuration & Usage Guide

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Overview

This guide will describe how to setup and use the Call Center option with Heartland Restaurant.

What is Call Center?

The Call Center feature allows Admin Portal users to place Online Orders at the account level with the ability to designate the order to a specified location. This also allows additional payment options to be utilized such as custom tenders.

How Do I Enable Call Center?

Contact the Heartland Restaurant Support Team to request this feature to be enabled.

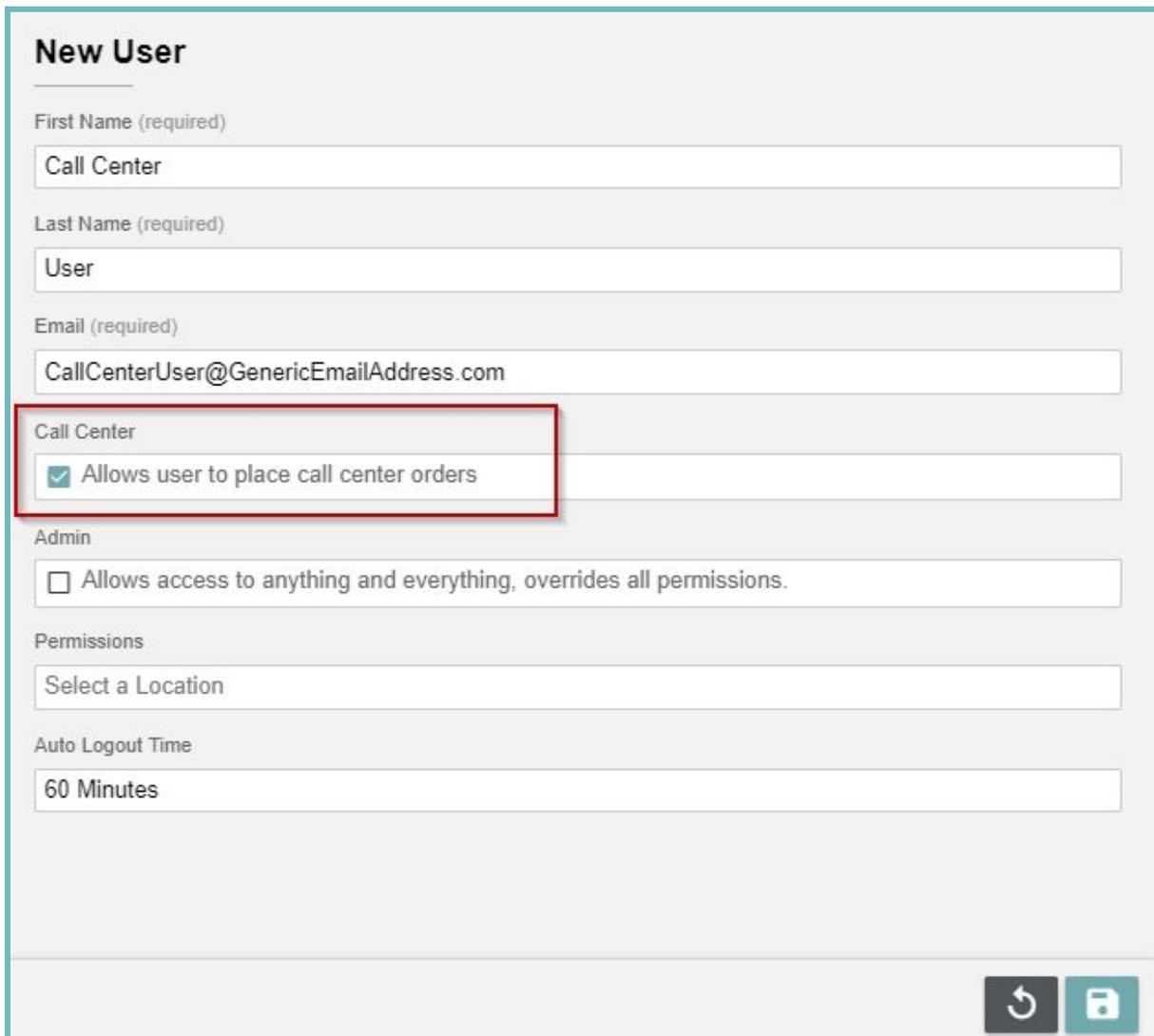HRSupport@heartland.us or 1-833-844-4767.

Configuration

Creating a Call Center User

After the Call Center feature has been enabled on the account, you will need to create a user or add the **Call Center**

permission to an existing user to access the Call Center features.

1. Log in to the **Admin Portal** and navigate to the desired **Account**.

2. At the **Account** level, select **Users** from the left-handed menu.
3. Select **New** to add a new user or **edit** an existing user then enable the **Call Center** permission .
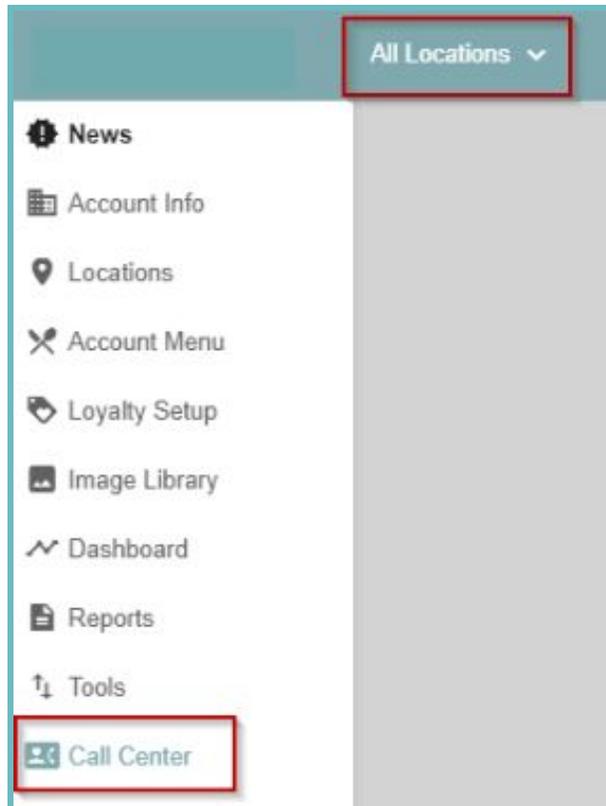4. Ensure changes are saved and published.

Using Call Center

Login

To see the **Call Center** tab you must be logged in as one of the Users with the **Call Center** permission.

Note: The **Call Center** tab is only visible at the **Account Level** for **Multi-Location Accounts**. Ensure **All Locations** are displayed at the top if you are not seeing the tab.

Usage

Once on the **Call Center** tab, the user can enter information for an order in the **form** displayed on the screen.

1. Select an **Order Method**(Online Ordering, Catering).
    a. Select an **Order Type**(Carryout, Delivery).
    b. **Note:** If a specific location does not support one of those options it will not show in the list of locations to select for the order.
2. Enter the **Phone Number** for the order.
    a. If the phone number entered is associated with a customer account, some of the other information fields may auto populate.
3. Enter in all **required customer/address** information in the respective fields.
4. Optionally, **special instructions** can be added to the order.
5. Once all the information on the form is entered, you can select the **Store Location** that will fulfill the order.
    a. The call center user can make a determination based on conversation with the merchant's customer or base the location selection on the distance shown in the Location List to choose the optimal location.
    b. If the customer has previously placed an order for that location you will see the option on the bottom right of the screen, **Order Previous Order** or **Create New Order.**
    c. Once either of these options are selected the user will be brought to the **Online Ordering** website to enter the customer's order, and the **Call Center** tab will be cleared so a new order can be entered. Steps for entering the order itself and payment for the order are covered [here](#).

The **Restart Order** button can be used to clear all the fields on the left side and start a different order if desired.

Online Order

Once a selection (*Order Previous Order or Create New*) is made in the **Call Center** tab it will then open a new browser tab to the merchant's Heartland Restaurant **Online Ordering** website.

1. The online order will auto-populate with the information previously entered in the Call Center tab.

2. Add the desired items to the customer's order. When done, select the **Shopping Cart** icon 🛒 at the top right and select **Checkout**.
   a. With Call Center, you will have more options than you normally would for an order when checking out.
      i. You can add an **Adjustment** to the order without a promo code and/or you remove the taxes from the order.

3. Select the desired payment method and enter any necessary payment information.
   a. With Call center you can pay using **Custom Tenders** which are not available when ordering normally. These are the same tender options that would be available in the Heartland Restaurant Application under **Checkout → Tenders.**
   b. To pay with a **Custom Tender** select it and then choose the desired tender from the drop down that appears.

4. To complete an order select **Submit Order**.

5. You will be brought to the **Order Completed** page similar to the page a customer would see if they did an online order themselves.