

# Heartland

---

# Restaurant

Admin Portal User Permissions

Rev. 5/2019

## Table of Contents

<b>What is the difference between the Permissions here and the Permissions found under Location Setup?</b>	<b>3</b>
<b>Creating &amp; Assigning a User Permission Level</b>	<b>3</b>
Creating a Permission Level	3
Assigning a Permission Level to a User	3
<b>User Permission Matrix</b>	<b>4</b>
Publish Changes	4
Location Setup	4
Staff Members	4
Menu	4
Loyalty	5
All Reports	5
Sales Reports	5
Payroll Reports	6
Labor Reports	6
Loyalty Reports	6



## What is the difference between the Permissions here and the Permissions found under Location Setup?

Permissions found under **Users** → **Permissions** pertain to **Admin Portal** users. This is what this document will cover.


Permissions found under **Location Setup** → **Permissions** pertain to Staff Members using the **Heartland Restaurant POS App**.


## Creating & Assigning a User Permission Level

### Creating a Permission Level

1. Navigate to the desired **Account** and select **Users**.
  - **Note:** User permissions for the Admin Portal are found at the **account level**.
2. Select **Permissions**. A list of existing **Permission Levels** will display.
3. Select **Create a Permission** or **New** to make a new **Permission Level**.
4. Enter a **Name** for the new **Permission Level**.
5. Select desired **permissions** that Users will have if they are assigned this **Permission level**.
  - See this [section](#) in this document for a detail of what functions each **Permission** aligns to.
6. When all desired **permissions** are chosen, select the **Save** icon  or **Add**  icon to save the **Permission Level**.

### Assigning a Permission Level to a User

1. Navigate to the desired **Account** and select **Users**.
  - **Note: Note:** User permissions for the Admin Portal are found at the **account level**.
2. Select **Users** in that list. A list of **Admin Portal** Users for the **Account** will appear.
3. Select the desired **User** from the list.
4. If you want a **User** to have **all** settings on the **Admin Portal** simply check the **Admin** setting.
5. If you want a **User** to be assigned a specific **Permission Level** select one under **Permissions**.
  - **Note:** With Multi-Location accounts you can give permission to specific locations and have different **Permission Levels** for each location selected.
6. Select the **Save**  icon when done to apply the changes.

Make sure to select **Publish Changes**  when done making all changes to **Users** and **Permissions**.

### User Permission Matrix

**Note:** If permission to a window is not enabled it will allow visibility to the current settings but, grey them out for editing or not display them as options.

Below is a list of areas that each permission grants access to edit when checked.

#### Publish Changes

The Publish changes permission will only turn off/on the ability to publish changes to a location.

#### Location Setup

##### Location Setup

- Settings
- Online Ordering
- App Ordering
- Rooms
- Custom Tenders
- Tip Out Types
- Paid In & Out Types
- Payout Apportions
- Dayparts
- Authorized Tablets
- Printers
- Display Formats
- Customer Receipt

#### Staff Members

##### Location Setup

- Staff
- Job Types
- Labor Categories
- Scheduled Shifts
- Permissions
- Report Access
- Break Types
- Time Punches
- Clock In Message

#### Menu

##### Menu

- Items
- Sections
- Groups
- Sizes
- Attributes
- Kitchen Groups
- Report Categories
- Daypart Categories
- Revenue Centers
- Modifiers
- Ingredients
- Context Items
- Taxes
- Tags
- Pricing
- Discounts
- Adjustments
- Promotions
- Void Reason

## Loyalty

### Loyalty Setup

- Loyalty
- Membership List

## All Reports

Enabling this will allow a User to view, print, or export the following reports to a CSV where functionality exists:

### Reports

- Daily Summary
- Items
- Ingredients
- Hourly Tickets
- Hourly Items
- Discounts
- Adjustments
- Taxes
- Surcharges
- Void Reasons
- Tips & Payouts
- Tip Outs
- Tickets
- Transactions
- Payment Terminals
- Cash Summary
- Cash Drawers
- Labor Summary
- Payroll Summary
- Time Clock
- Loyalty(Account level only)

### Dashboard

- Snapshot
- Sales
- Staff

## Sales Reports

Enabling this will allow a User to view, print, or export the following reports to a CSV where functionality exists:

### Reports

- Daily Summary
- Items
- Ingredients
- Hourly Tickets
- Hourly Items
- Discounts
- Adjustments
- Taxes
- Surcharges
- Void Reasons
- Tips & Payouts
- Tip Outs
- Tickets
- Transactions
- Payment Terminals
- Cash Summary
- Cash Drawers
- Loyalty(Account level only)

**Dashboard**

- Snapshot
- Sales
- Staff

**Payroll Reports**

Enabling this will allow a User to view, print, or export the following reports to a CSV where functionality exists:

**Reports**

- Payroll Summary
- Time Clock
- Loyalty(Account level only)

**Labor Reports**

Enabling this will allow a User to view, print, or export the following reports to a CSV where functionality exists:

**Reports**

- Labor Summary
- Loyalty(Account level only)

**Loyalty Reports**

Enabling this will allow a User to view, print, or export the following reports to a CSV where functionality exists:

**Reports**

- Loyalty