Heartland

Restaurant

Offline Capabilities

Table of Contents

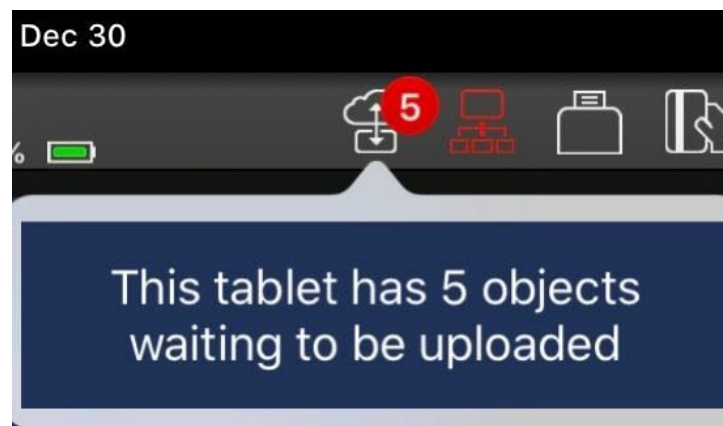## Overview

This document will cover the offline capabilities within Heartland Restaurant and the work flows when the system is offline.

Identify when you're offline

When in the Heartland Restaurant App, you can tell at a quick glance if you have lost internet connection by looking at the **Cloud Sync** icon at the top of the screen. If the connection is lost, you will see **Red Badge** with a number in the corner. This indicates that the tablet is not communicating with the cloud and could be offline or having intermittent issues communicating with the Portal.

No WiFi Watermark

The **No Wifi** watermark will show when the iPad is **not** connected to a **Local Network**. The **No Wifi** watermark will not show when the tablet is connected to a network locally and has no internet. When you see this watermark it doesn't necessarily mean that you don't have internet at the place of business, instead, it means that your tablet is not connected to the proper network.

Guest Display

The Guest Display connects to the paired iPad automatically over Ethernet, WiFi, or Bluetooth using Apple's MultipeerConnectivity. While internet connection is not required for normal operations of a guest display, internet connectivity is required for first time logins to the restaurant to receive configuration data and images from the portal.

Kiosk

Kiosk requires Internet connectivity because we are using the same basic framework for accepting Kiosk orders used for online orders. This is also true for any orders placed via the Guest App.

Reports

Since reports pull their data directly from the cloud, internet connection is required to access reports from the POS application. When trying to access reports without the internet, the tablet will call out to the internet for a few moments until the software times out. **This includes time punch management**.

Changing PIN

Changing a user PIN number from the POS application is unavailable without an active internet connection.

Offline Transactions

Currently, you can do offline transactions with a **MSR** while using the **Monetary** or **Bridgepay** gateways. The best practice when setting up Monetary and Bridgpay is to run a transaction through the MSR while offline. Then bring the iPads back online and Auth the transaction. This will verify that offline and online works.

Configuration

To run offline transactions, you will need to enable **Offline Transactions** under Location Setup > Settings > Transaction Settings.

- Make sure to Save and Publish changes so the tablets are updated to enable offline mode within Heartland Restaurant. If this setting is **not** enabled when a location goes offline, the merchant will **not** be able to use offline mode.

Under Location Setup > Payment Gateway, make sure you have either Monetary or Bridgepay selected.

- If using BridgePay,
  - Follow the BridgePay setup guide here.
  - Fill out the BridgePay Settings.
  - Save and Publish.
  - Run a test transaction online to make sure the location can accept transactions.
- If using Monetary,
  - Fill out the Boarding Form.
  - When you receive your Public and Secret Keys, input them into the Monetary Settings
  - Save and Publish.
  - Run a test transaction online to make sure the location can accept transactions.

Offline Workflow

When a location notices that they have no internet and cannot process credit cards:

1. PIN into Heartland Restaurant.

2. Tap the 3 lines at the top right.
3. Tap **Manager.**
4. Tap **General**.
5. Enable **Force Offline Credit Card Processing**.
6. An Icon will show at the top to indicate that you are currently processing cards offline.
    a. **IMPORTANT** - Credit cards are not going to be authorized when offline. You will run the risk of not getting paid for a ticket if the card declines or doesn't have enough funds when authorizing after restoring the internet.
7. With an open ticket that is using a credit card, tap **Checkout.**
8. **Swipe** on the MSR or **manually** enter the credit card.
    a. If you are using EMV solutions, you may need to detach the **Payment Terminals** to manually enter credit cards offline.
    b. When you are back online, be sure to re-attach the **Payment Terminals**.
9. This will approve the credit card and mark the ticket on the POS as Offline. **The ticket will show as purple.**

When the locations internet is back online and communicating to the cloud:

1. Tap the offline **Yellow Triangle** at the top of the ticket screen.
2. Tap the **(Touch to show in Settings).**
3. Navigate to **Manager** > **General** to disable **Force Offline Credit Card Processing.**

Authorization Workflow

Approving pending authorizations from daily close screen:

1. Tap the 3 lines at the top right.
2. Tap **Manager.**
3. Tap **Daily Review** .
4. Tap on **Tickets.**
5. Tap **authorize all** to authorize all the tickets with pending authorizations.
    a. Tickets can also have pending tips.
    b. To process the tips from Daily Review.
    c. Tap **Tips** > **Capture Tips.**

Approving pending authorizations from within a ticket:

1. Locate the Ticket that needs to be authorized.
2. Tap the payment field near the bottom of the ticket.
3. Tap Auth.

If the card was valid, and the internet is back up, the ticket will return an approval. If it is declined, it is likely an invalid card.