Heartland | Cash Register Express

Payroll Connector & Mobile Manager Connector
Implementation Guide

Rev 12/2023

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Introduction

This guide describes how to install and configure the Mobile Manager Connector to support the Heartland Payroll Connector. The Mobile Manager Connector runs in the background, and uploads your sales and labor information to Mobile Manager Analytics so it can be viewed elsewhere. Before you configure the Mobile Manager Connector, you will need the following:

▸ Your Mobile Manager credentials and configuration parameters

▸ Your CRE/RPE SQL Database Information

To obtain your Mobile Manager Credentials and configuration parameters, please review our article on "Using the Heartland Mobile Manager Admin Console".

This guide will show you how to obtain your CRE/RPE SQL Database Information. It will also help you configure settings in Cash Register Express to work with the Mobile Manager Connector to upload sales and babor information correctly.

To upload your employee labor data, you must configure the following;

▸ Employee Job Code and assign Job codes to each employee.

▸ Overtime Calculation method.

▸ Labor Export Type.

▸ Work Week Start day.

Installation Requirements

▸ CRE/RPE Version 12.8014 or higher

▸ CRE/RPE SQL Database Information

▸ Enable Log Exceptions for Line Item Deletion

▸ Mobile Manager Connector Tool

▸ Mobile Manager Credentials/Parameters

CRE Labor Configuration (Optional)

If you are tracking Labor this section is required for setup. If not, please skip this section and continue to the next section called "How to obtain your CRE Database Information".

Work Week Start Day

1   Select **Options** or **Manager**, and enter credentials if prompted.

2   Select **Setup**, then **Setup Screen**.
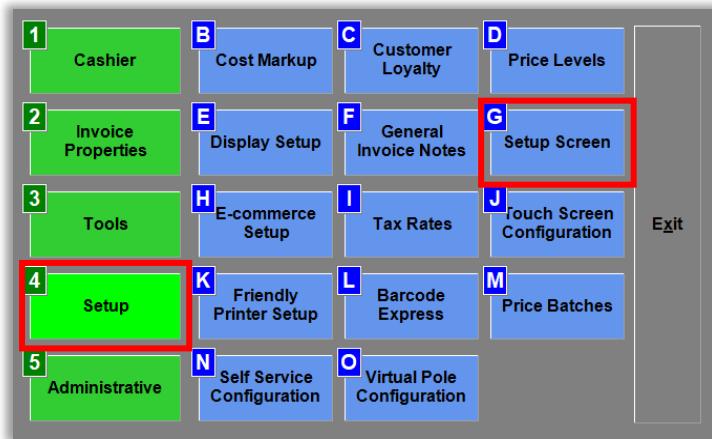
3   Select the **Company Info** tab, select the work week start day from the **Work Week Starts On** list, then click **Update**.

Overtime Calculation

1 Select **Options** or **Manager**, and enter credentials if prompted.

2 Select **Setup**, then **Setup Screen**.
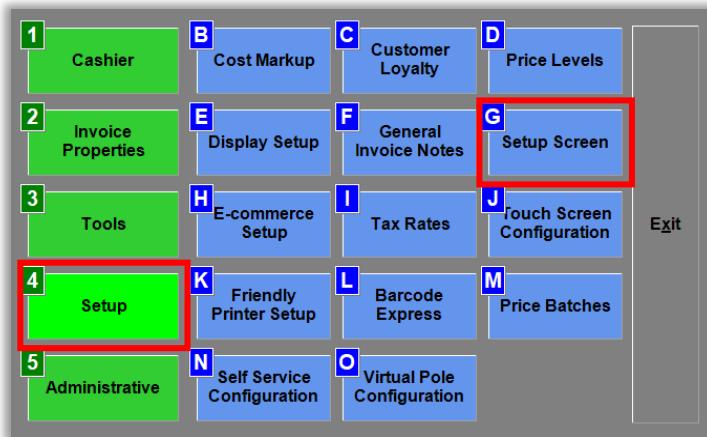
3 Select **System Access** and, under the **Time Clock** tab, make the appropriate **Overtime Calculation Method** selection.

- **Weekly** - Employees start earning overtime after they have worked 40 hours within a single work week.

- **Daily** – Employees start earning overtime after they have worked 8 hours within a single work day.
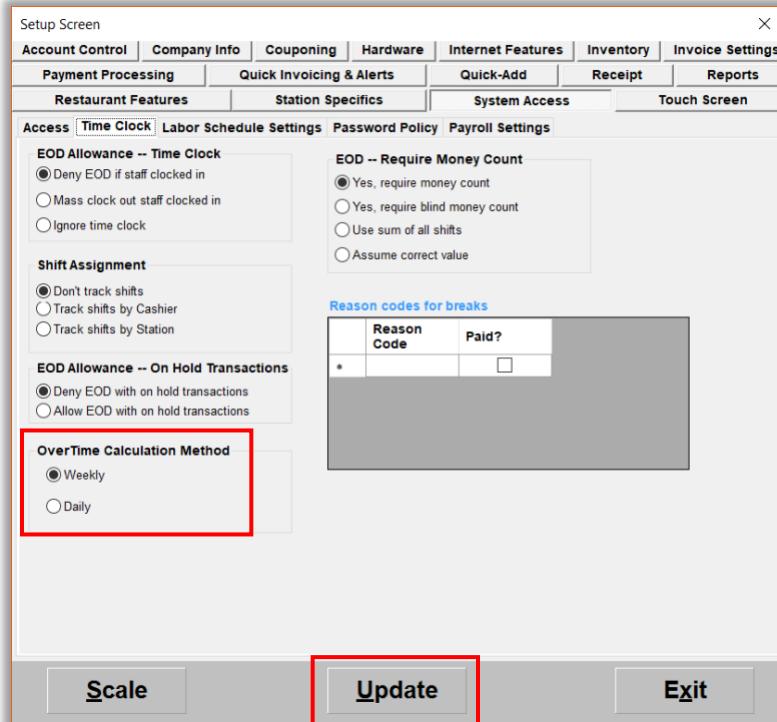

4 Click **Update** to save your changes.

Employee Job Code Configuration

1 Select **Options** or **Manager**, and enter credentials if prompted.

2 Select **Administrative**, then **Employee Maintenance**.
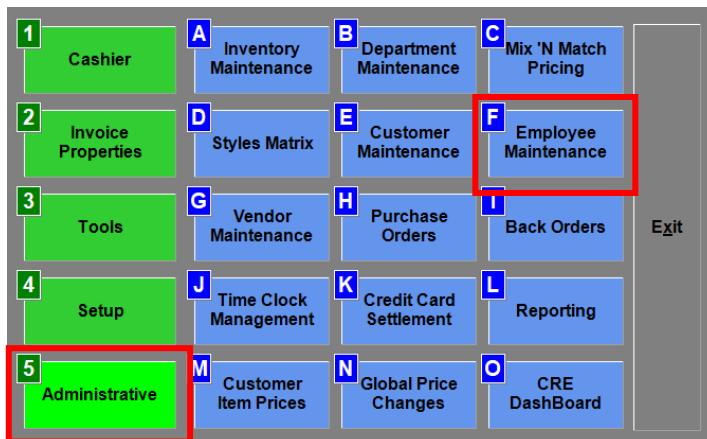
3 Select **Job Code Setup**.

4 Select **Add**, and enter the following:
- **Job Code Name**
- **Default Wage**
- **Default Overtime Wage**

5 Click **Payroll Settings** to open the window below, enter values, and click **Save and Exit**.
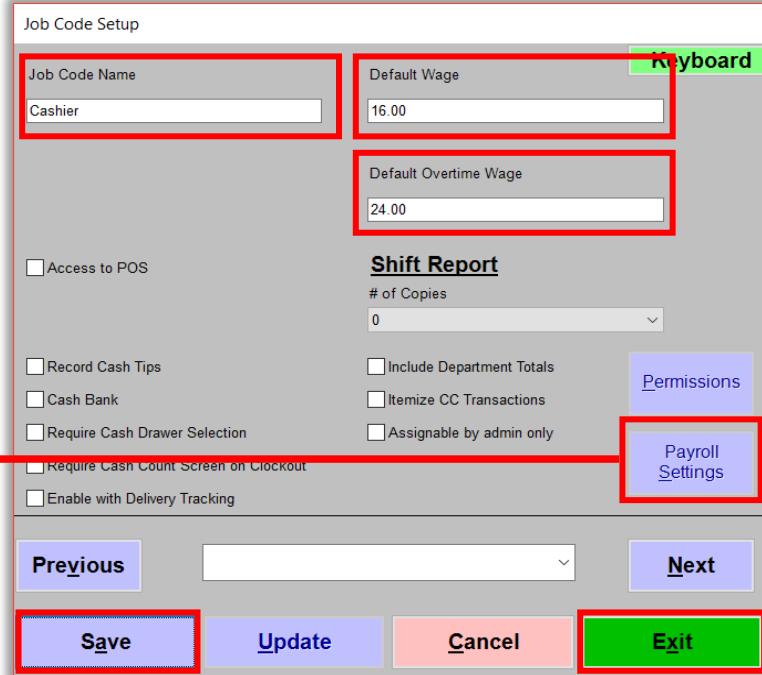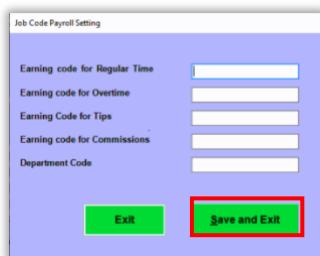
6 Once returned to Job Code Setup screen, click **Save**, then **Exit**.

To learn more about these options, please refer to the Job Code Setup Guide.

7 Navigate to the employee for whom you wish to assign the job code and, from the **Job Codes & Wages** tab, select **Add**.
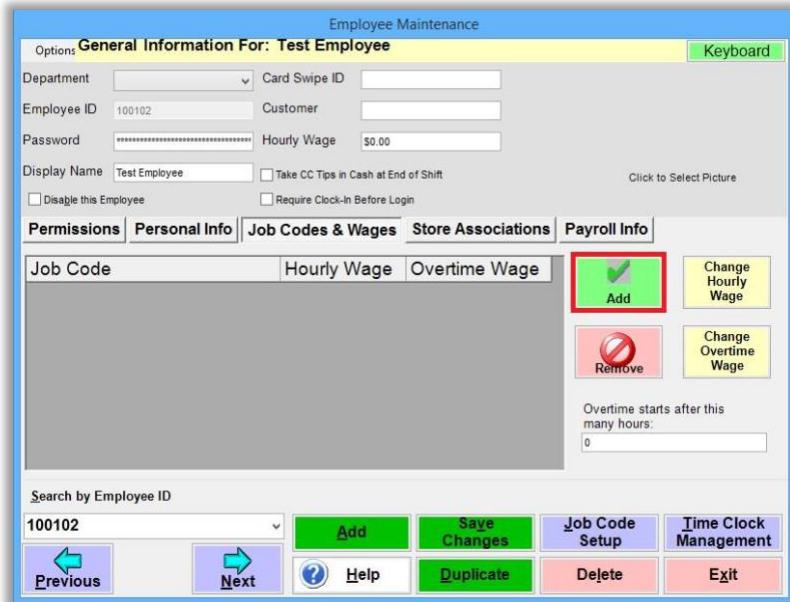
8 Select the job code you wish to assign, then click **Select**.

9 Answer each of the wage prompts, and click **OK**.

Note: These will display with the default values assigned in **Job Code Setup**.

10 Enter the number of hours the employee needs to work in order to begin receiving overtime.
Note: This number is dependent upon whether you selected **Weekly** or **Daily** overtime calculation.

- Enter **40** for **weekly** overtime calculation method.
- Enter **8** for **daily** overtime calculation method.


11 Select **Save Changes**.

CRE Payroll & Employee Configuration (Required)

As of Mobile Manager v2.5.1, the Central API feature is available to send payroll (wages, tips, and commission) data. This feature can run on its own or along with Mobile Manager. This section will guide you through the configuration of this feature.

Note: All Employees using the program must be clocked in, including those paid salary. For salaried employees, set wages to zero and do not assign a job code.

Payroll Configuration

1 Select **Setup**, then **Setup Screen**.

1 Cashier	**B** Cost Markup	**C** Customer Loyalty	**D** Price Levels
2 Invoice Properties	**E** Display Setup	**F** General Invoice Notes	**G** Setup Screen
3 Tools	**H** E-commerce Setup	**I** Tax Rates	**J** Touch Screen Configuration
4 Setup	**K** Friendly Printer Setup	**L** Barcode Express	**M** Price Batches
5 Administrative	**N** Self Service Configuration	**O** Virtual Pole Configuration	

E**x**it
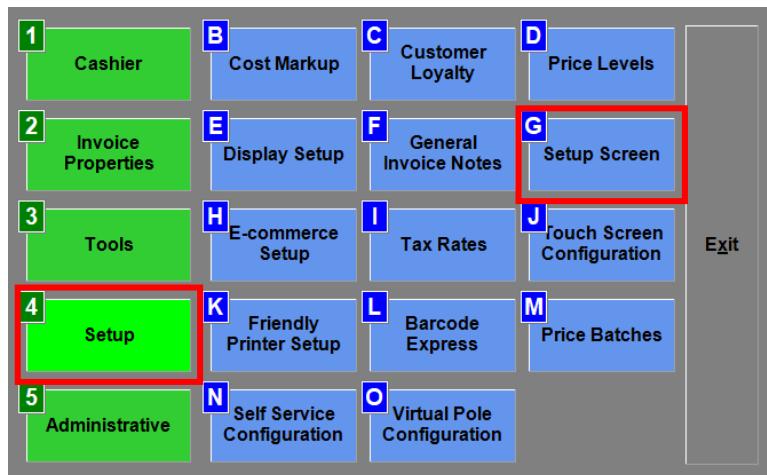
2 On the **System Access** tab, go to **Payroll Settings**.

Setup Screen

Account Control | Company Info | Couponing | Hardware | Internet Features | Inventory | Invoice Settings
Payment Processing | Quick Invoicing & Alerts | Quick-Add | Receipt | Reports
Restaurant Features | Station Specifics | System Access | Touch Screen

Access | Time Clock | Labor Schedule Settings | Password Policy | Payroll Settings

Payroll Export Type

○ Payroll City
◉ Heartland PlusOne
○ Xenon

Scale | Update | E**x**it

3 Under **Payroll Export Type**, select **Heartland PlusOne** and click **Update**.

Employee Configuration

Each Employee must have a unique payroll ID number. These are set as follows:

1 Select **Administrative**, then **Employee Maintenance**.
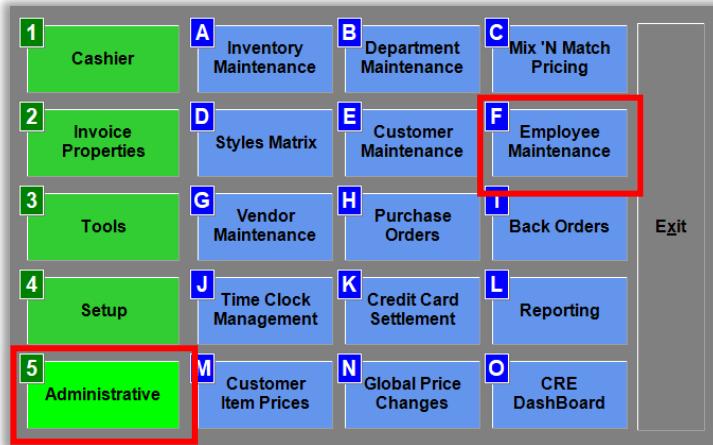
2 Select an employee, then select **Payroll Info**.

3 Enter the payroll ID in the **Payroll Employee Number** box, then **Save Changes**.

How to Obtain your CRE Database Information

Before we install Mobile Manager Connector, it's a good idea to have your CRE Database information already recorded so it can be used to configure the Mobile Manager Connector after it's been installed.

1   With CRE open at the login screen, go to **File | Database Maintenance | View Database Settings**.

2   Enter administrator password and select **OK**.
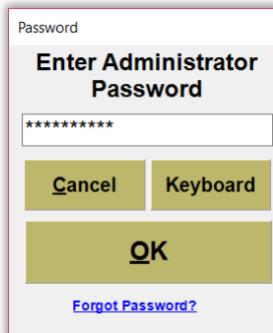
3   Enter the appropriate information in the following boxes:

- **Server Name**
- **Database Name**
- **Instance Name**
- **User Name**
- **Password**

4   **Note:** If you've created your own SQL Server Account/Instance with a unique password, record it now.

5   Select **Cancel**.
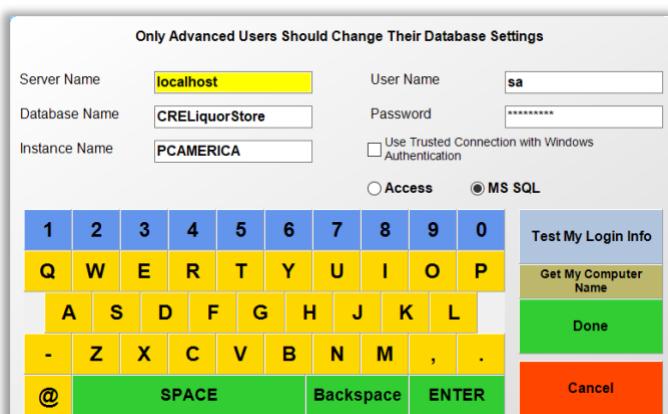
How to Configure CRE to Work with Mobile Manager Connector

In order for the Mobile Manager Connector to upload voids, log exceptions for line item deletion must be enabled in the Setup Screen.

1   Select **Options** or **Manager**, and enter credentials if prompted.

2   Select **Setup**, then **Setup Screen**.
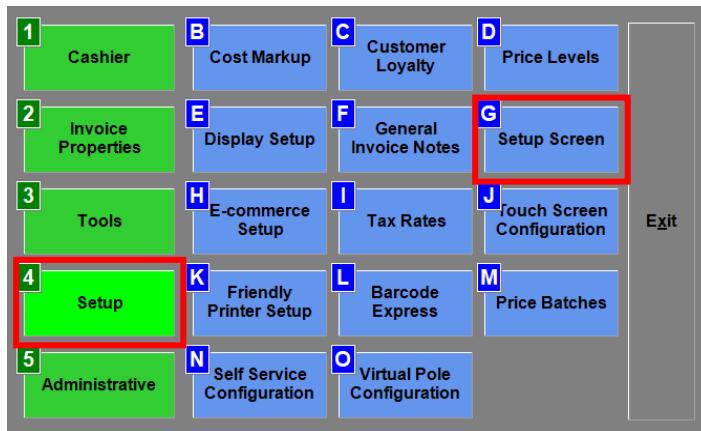
3   Select the **Invoice Settings** tab and, under **Log Exceptions for**, check the **Line Item Deletion** box, then click **Update**.

Installing the Mobile Manager Connector

Download the most recent version of the Mobile Manager Connector Tool from this page.

1 Navigate to the location of the downloaded installer file, right-click **Mobile ManagerConnectorInstaller.exe**, and select **Run as Administrator**.
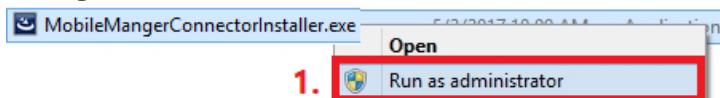
Windows User Account Control may display the prompt, "Do you want to allow the following program to make changes to this computer?" If so, select **Yes**.
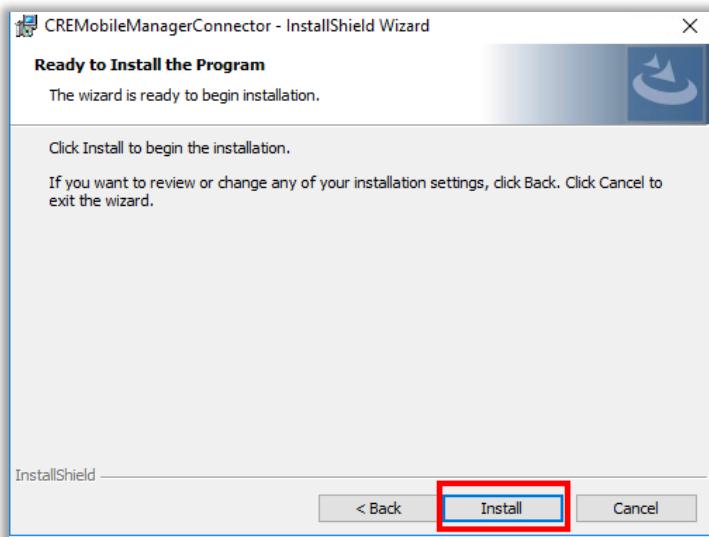
2 Select **Next** at introductory page, and again at **Destination Folder** page, then select **Install**.
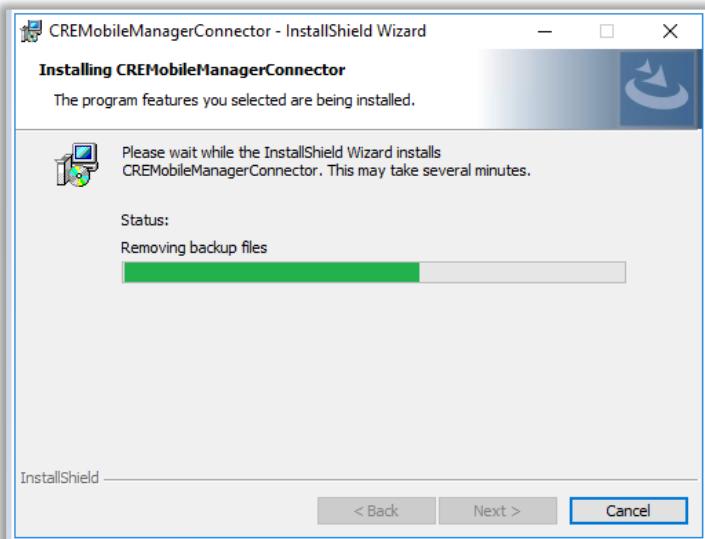
3 Wait for the installer to finish.

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4 Finally, check the **Launch CREMobile ManagerConnector** box, then click **Finish**.
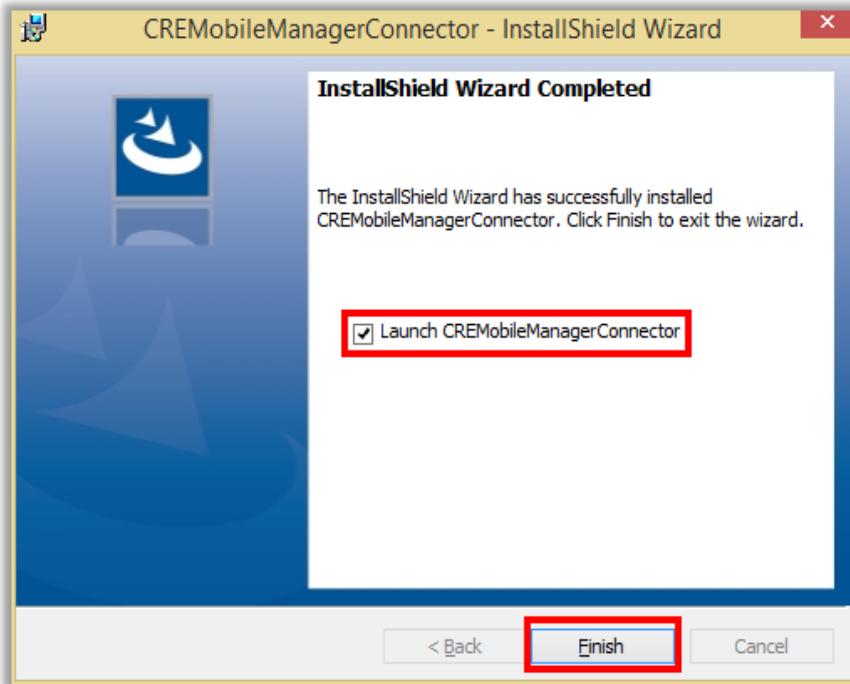
Configuring the Mobile Manager Connector

Now that the Mobile Manager Connector has been installed, it must be configured with your CRE Database information and your Mobile Manager credentials in order for it to upload information to Mobile Manager Analytics.

Database Settings

1 When the Mobile Manager Connector opens, enter the information obtained from How to Obtain Your CRE Database Information in the corresponding boxes under **Database**.
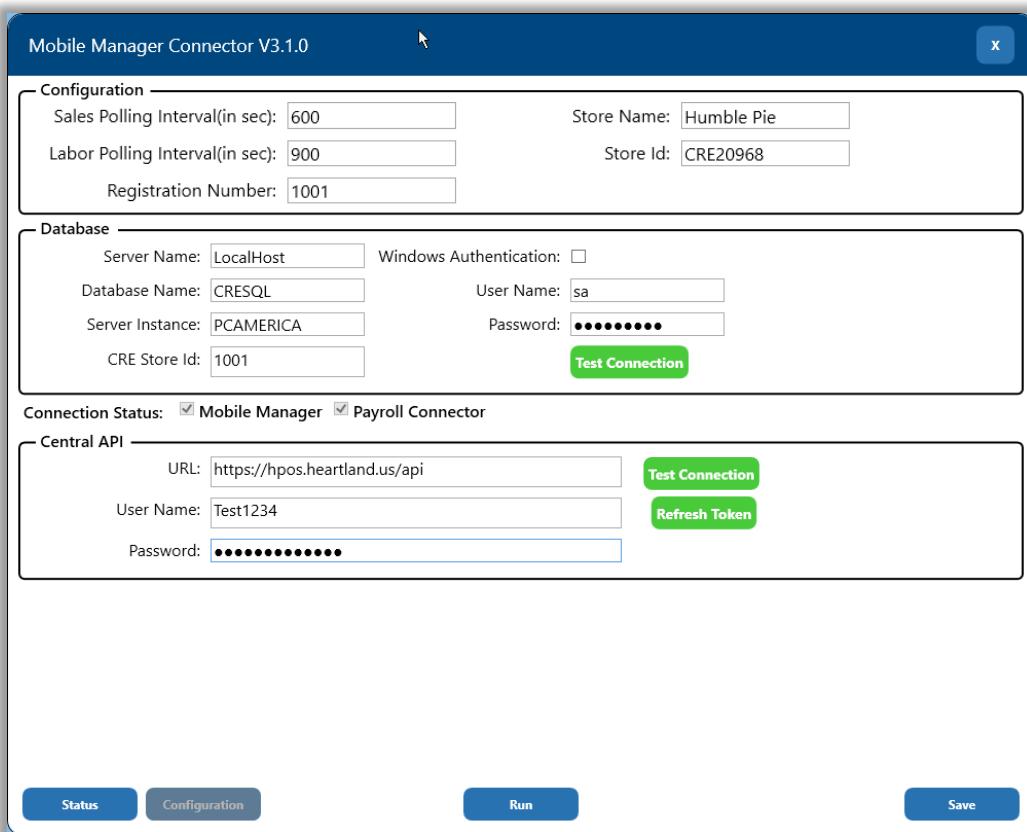
2 If you've created your own SQL Server Account/Instance with a password that differs from the default password created by the CRE Full Installer, enter that password here.

3 Select Test Connection.

- If the **Test Connection** button is green, proceed to the next step.

- If the **Test Connection** button is orange, review the section "How to Obtain your CRE Database Information" to confirm your database information. Make corrections as needed, then test the connection again.

Configuration Settings

1 Enter **Configuration** data as follows:

- **Sales Polling Interval**: Enter the number, in seconds, you'd like the Mobile Manager connector to upload sales data.

- **Labor Polling Interval**: Enter the number, in seconds, you'd like the Mobile Manager connector to upload Labor data.

- **Registration Number**: This field will automatically populate upon log-in and connection to the Central API.

- **Store Name**: Enter the name for the business determined by the POS Support Representative.

- **Store ID**: Enter any unique number you'd like to use to identify this store location from other stores.

2 Select **Save**.

Central API Settings

Assuming you have completed the necessary [Employee Configuration](#), you may now continue to configure the Central API in Mobile Manager as described below.

▶ You will need the payroll information provided by your Heartland payroll account manager/dealer to complete this configuration.

▶ If you are upgrading from a previous version, you will need to check the **Central API** box next to **Upload to.** Doing so will enable the **Central API** section to accept your credentials. By default, new installations will have this option checked. If you are using only the Central API, uncheck the **Mobile Manager** option.

1 Enter your **Central API** credentials

Mobile Manager Connector V3.1.0 ⬜ x

Configuration

Sales Polling Interval(in sec):	600	Store Name: Humble Pie
Labor Polling Interval(in sec):	900	Store Id: CRE20968
Registration Number:	1001	

Database

Server Name:	LocalHost	Windows Authentication: ⬜
Database Name:	CRESQL	User Name: sa
Server Instance:	PCAMERICA	Password: •••••••••
CRE Store Id:	1001	**Test Connection**

Connection Status: ☑ Mobile Manager ☑ Payroll Connector

Central API

URL:	https://hpos.heartland.us/api	**Test Connection**
User Name:	Test1234	**Refresh Token**
Password:	••••••••••••	

Status **Configuration** **Run** **Save**

• Enter https://hpos.heartland.us/api in the **URL** box.
• Enter your **User Name** and **Password** as provided by your manager/dealer.

2 Click Test Connection.
• **Green**: Connection is successful.
• **Yellow:** Connection is not successful.

3 Select **Run** to save settings and start the service.
• The **Run** button is only enabled after you have successfully connected for all selected features, and the corresponding **Test Connection** buttons display in green.
• Since the **Run** button saves your settings, you do not need to click **Save**.

4 Should you need to refresh your Central API token, select the **Refresh Token** button.

To verify the status of the Mobile Manager Connector, select **Status** and, in the window that opens, confirm that the most recent entry reads: Mobile Manager Sales Service is: [Running].
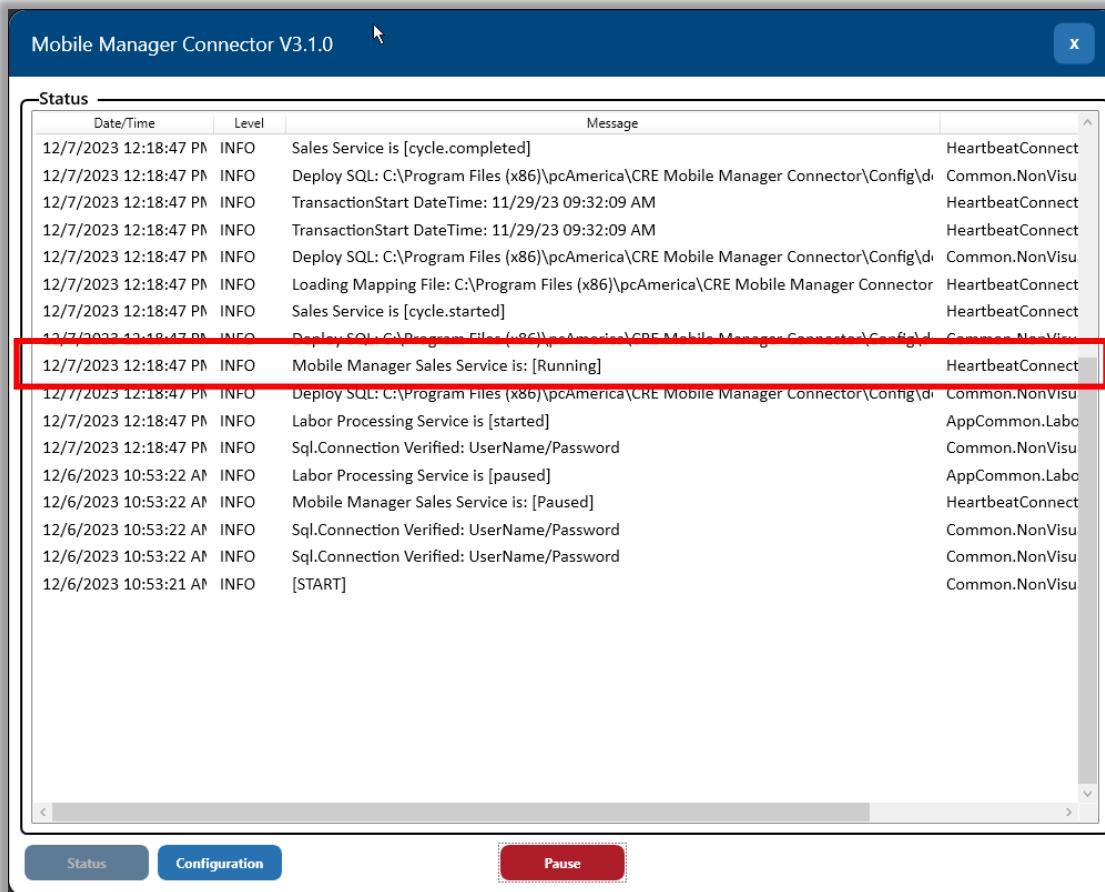

Please note: When the Mobile Manager Connector is running, you will be prevented from making any changes to the configuration settings until it is paused.

Stop, Start, or Configure Mobile Manager

In the event you need to change the Mobile Manager Connector's settings, you must first pause the service, make your changes, and then restart.

1   If the Mobile Manager Connector is running, click **Pause**.

2   Select **Configuration**.

3   Make required changes and select **Save**.

4   Select **Run**, then **Status**. The most recent Mobile Manager entry should read: Mobile Manager Sales Service is: [Running].
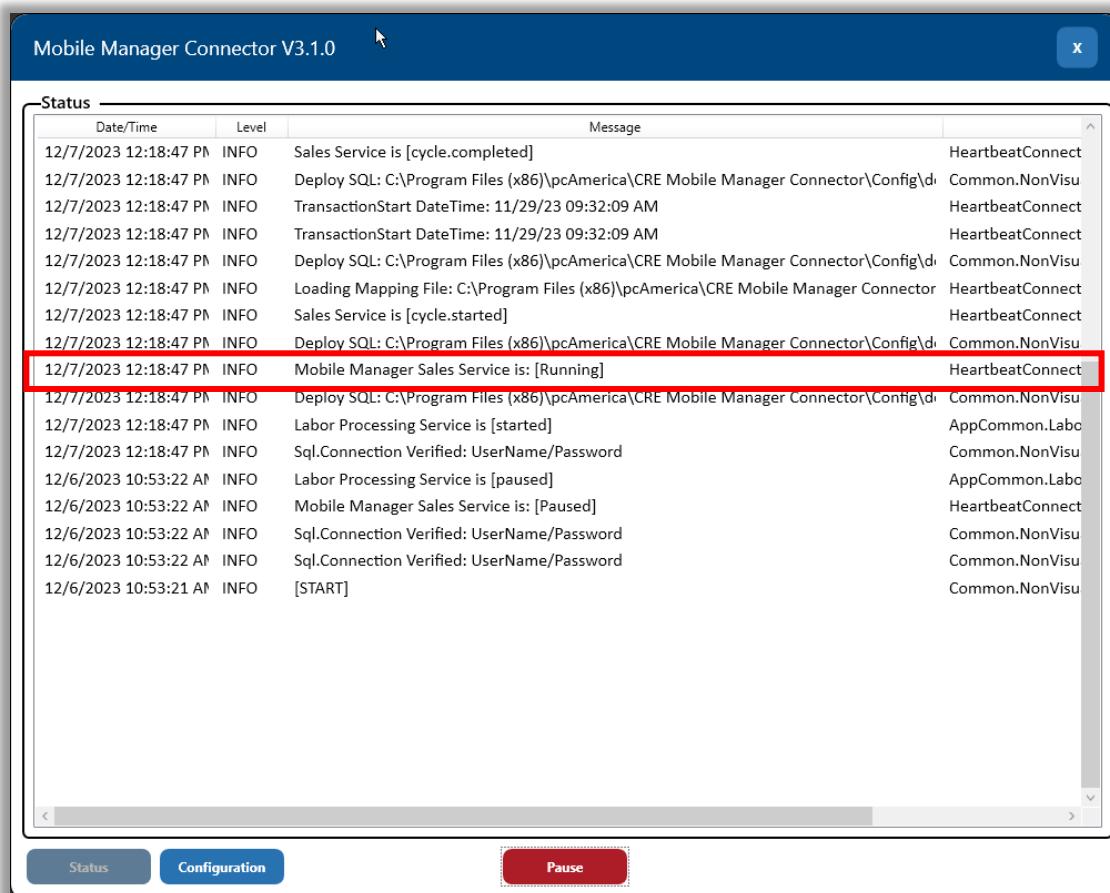
Verify Background Status of Mobile Manager Connector

Should you ever wish to check the status of the Mobile Manager Connector (for example, after rebooting your computer), follow the steps below:

1 In the Windows notification area in the lower right corner of the screen, look for the **CRE Mobile Manager Connector** icon. Depending on your Windows settings, you may need to select the **Up** arrow key to view hidden icons. If you don't see the icon, double-click the **CRE Mobile Manager Connector** desktop shortcut.

2 Find the **CRE Mobile Manager Connector** icon in the notification tray, and double-click the icon.

3 Select the **Status** button. The most recent entry should read: Mobile Manager Connector Service is: [Running].
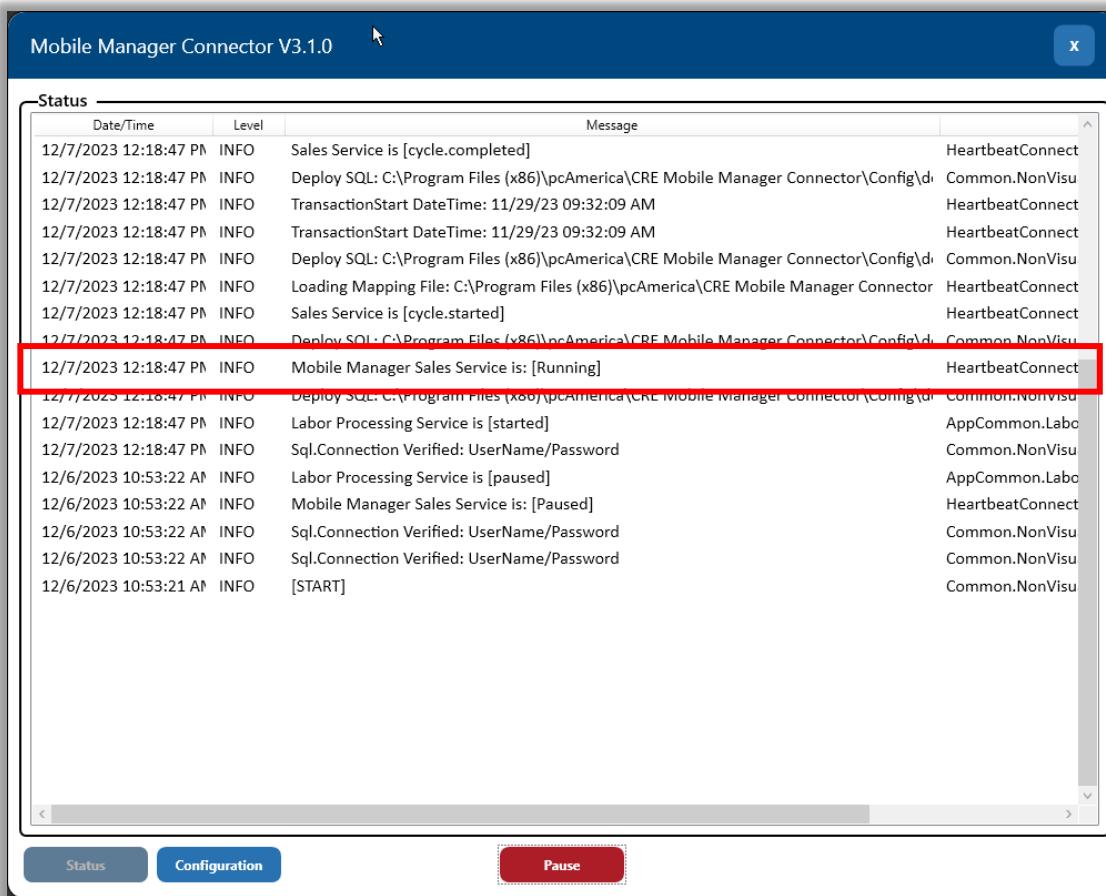
Uninstalling Mobile Manager Connector for Upgrade

In the event that you need to upgrade the Mobile Manager Connector tool, you first have to uninstall the program. To do so, take the following steps:

1 Open the Windows Control Panel, Select **Add or Remove Programs**, select the **CRE Mobile Manager Connector**, and select **Uninstall**.
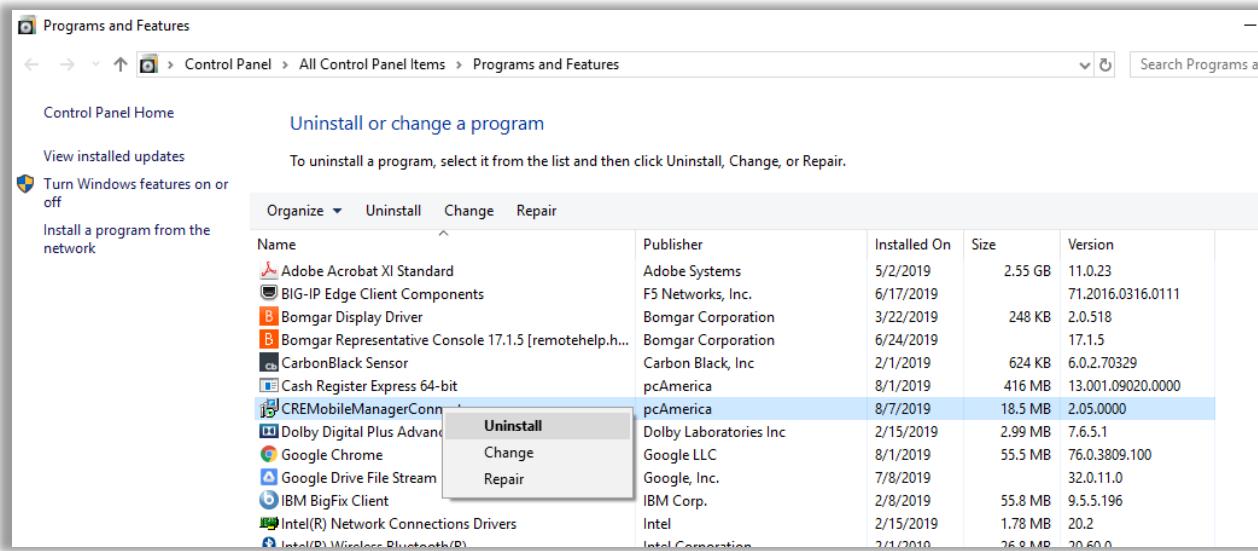
2 Windows User Account Control may display the prompt, "Do you want to allow the following program to make changes to this computer?" If so, select **Yes**.

3 Wait for the uninstaller to finish removing the program.

4 When it has finished, restart the computer.

Important Contact Information

▸ For any and all POS Payroll Connector boarding inquiries, please contact:
POSPayrollBoarding@heartland.us

▸ For any and all Payroll Support inquiries, please contact: POSPayroll@heartland.us

▸ For any Heartland Payroll Boarding and/or Support inquiries, please contact:
taa.pos.productsupport@e-hps.com