

# Heartland

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# Restaurant

ELOview SOP

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Date	Version	Author	Summary
05/22/2024	1.0	JWD	Original document introduced.

# Disclosure

This document was created for the Heartland internal community. It is private and contains confidential information. It is intended for internal use only and is not to be given in printed or electronic format to dealers, end-users, or third-party companies.

## Overview

This document applies to Android devices only and outlines the Heartland POS processes related to Merchant Onboarding, which includes:

- ▶ Device Ordering
- ▶ Enrollment Group Assignment
- ▶ MDM Deployment Types (Use Cases)
  - Heartland Restaurant
  - Heartland Retail
- ▶ MDM Functionality
- ▶ Development Process

Our HPOS Deployment team will handle:

- ▶ Device Enrollment
- ▶ Assigning Devices to Groups

# ELO Android POS Orders

## Ordering Devices

When ordering Android devices through a partner such as ELO or Sunmi, you must add the serial numbers to our MDM platform. This will ensure that the devices are enrolled in our ELOview management system and will receive the correct software and licensing. Without enrollment, we will be unable to manage the devices or allow access to private software builds.

ELO devices are restricted from downloading the Heartland Restaurant POS app (or any other software) from Google Store or other public platforms. All apps must be assigned to a device from within ELOview, or the device will lock itself. (Also, the POS app for ELO devices is not available in Google Store.)

Group assignments will determine which applications the devices receive. Devices ordered with an Ingenico Moby device **MUST** add the Moby serials to the Hosted Estate Manager to ensure they receive the proper updates and files.

# ELOview Deployment

## Heartland Restaurant

Heartland Restaurant has one application for all tiers, and each merchant's "Feature Tier" is based on what they purchased. We handle feature flagging through LaunchDarkly, and ELOview will only need to deploy one version of Heartland Restaurant to production.

*Essentials & Complete*

### **Restaurant Group: Alpha, Beta, and General Availability**

POS units should be deployed with the following applications:

- ▶ Heartland Restaurant
- ▶ MB5500 FW Updater (resolved by GA)
- ▶ Enable Multi-Client Input (resolved by GA)

## Heartland Retail

Heartland Retail also only has one application for all tiers, and each merchant's "Feature Tier" is based on what is purchased and is set in Landlord.

*Essentials & Complete*

### **Retail Group: Alpha, Beta, & General Availability**

All Heartland Retail locations should be deployed with the following Heartland Retail apps, regardless of the tier the merchant is signed up for.

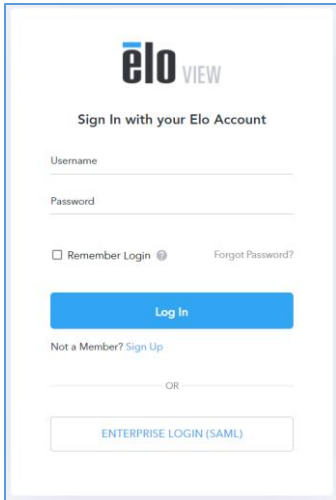
- ▶ Heartland Retail
- ▶ MB5500 FW Updater (resolved by GA)
- ▶ Enable Multi-Client Input (resolved by GA)

## Device Updates

### **Upgrading Applications to the Latest Build**

You can upgrade applications in ELOview's Contents screen.

- 1 Log into [Heartland ELOview](#).



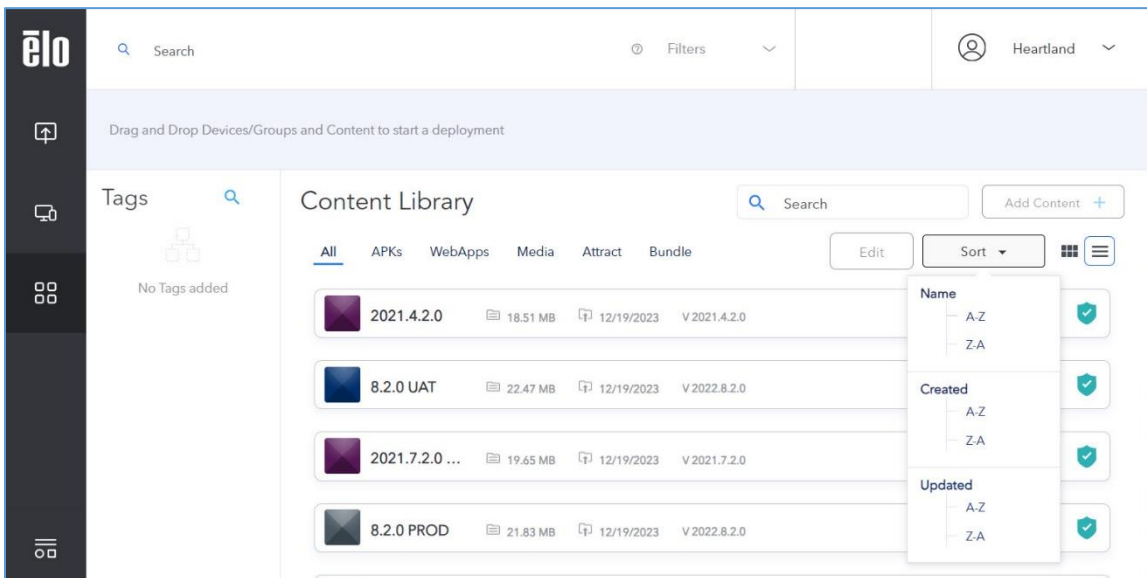
- 2 In the Home screen, click the **Content** tab.



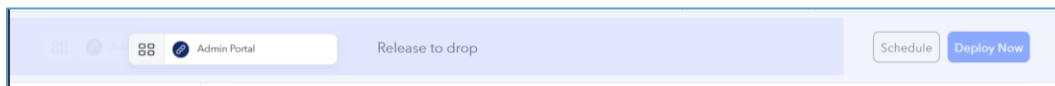
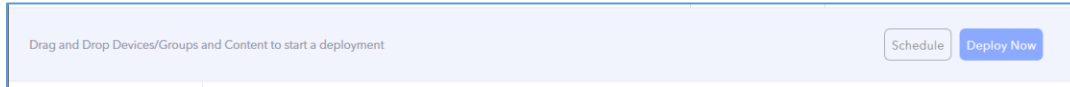
- 3 In the Content Library screen, click the **List View** option.



This area is best navigated using the Sort feature while in List View.



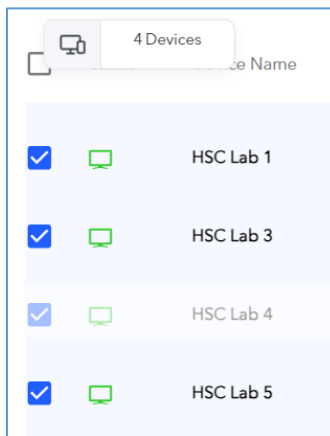
- 4 Deploy the application as Default Content by clicking and dragging it from the **Content Library** to the **Deployment** bar.



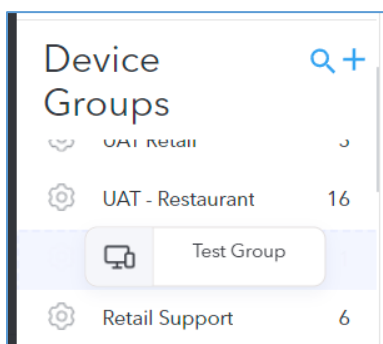
- 5 Return to the Home screen and click the **Devices** tab.



- 6 Select the device or group that will receive the content.
- 7 Drag and drop a desired device for a single deployment, or select multiple devices by selecting their check boxes and then dragging the bundle of devices to the **Deployment** bar.



- 8 Alternatively, you can click a group and then drag it to the **Deployment** bar.

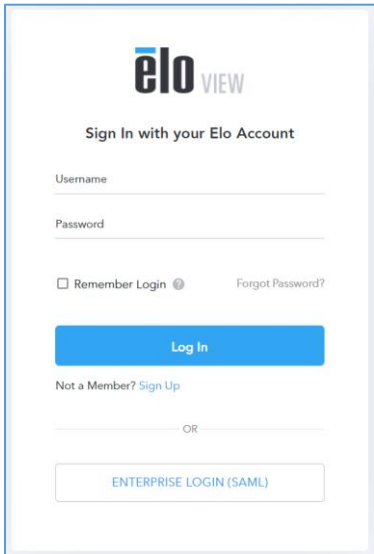


- 9 When ready, click **Deploy Now** to deploy the new content to the device(s).

## Updating the OS Version

ELOview allows Heartland to manage OS version deployment by choosing when and what version to deploy to supervised devices.

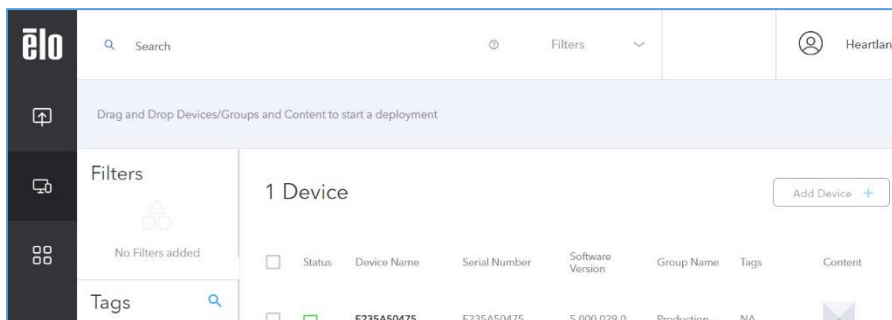
- 1 Log into [Heartland ELOview](#).



- 2 Navigate to the **Devices** column.



- 3 In the Devices screen, find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.



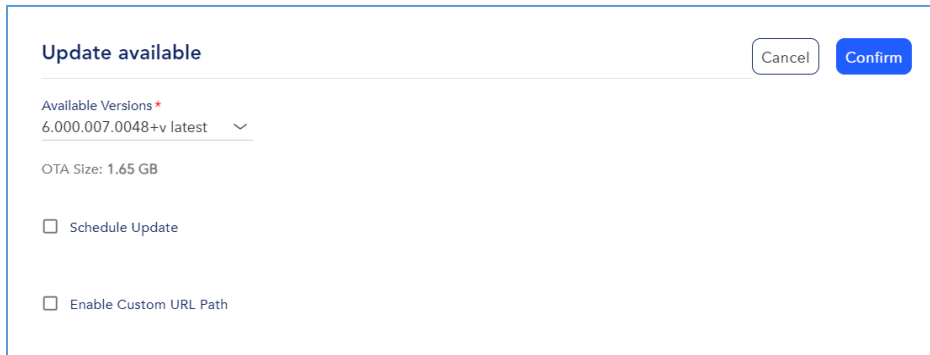
The device's displayed name will be its serial number by default, unless it is changed by a member of the Alpha or Support teams.

- 4 Select the device.
- 5 In the Device Details panel, click the **Software** tab.

- 6 Click the **Gear** icon.



- 7 Select the update and desired schedule time if needed for deployment, then click **Confirm**.



## Identifying the currently active package.

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.



- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.



- 4 Once selected, you will be taken to the **Info** tab. Navigate to the **Activity** section to identify what package and version are currently running.

**Activity**

Now Playing

APK HRest 2.3.90 ✓

117.88MB

1/29/2024

High Quality Screenshot ↻

Enabled

Package Name: com.restaurant.hpos

Version: 2.3

## Public General Availability

Devices in the GA groups will receive the latest updates at a scheduled content deployment time. When **Default Content** is set for a group, it will be deployed based on the **Delayed Content Deployment** schedule time for that group.

Delayed Content Deployment ?

Scheduled

2:45 AM

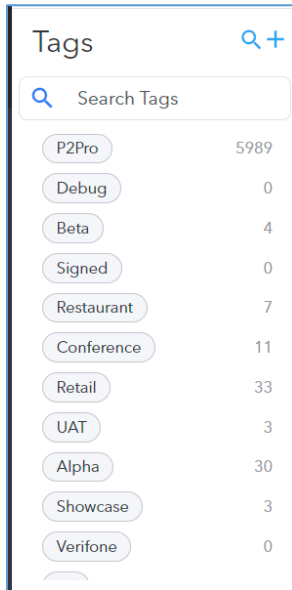
Tuesday, Wednesday, Monday

If **Delayed Content Deployment** is not enabled, the deployment will happen immediately.

Use caution when deploying in this manner as it will cause the app to force close on the device if it is open.

## Alpha and Beta Availability

The ability to deploy unique content to the Alpha and Beta devices is achieved through the use of tags.



The screenshot shows a 'Tags' page with a search bar and a list of tags. The tags are: P2Pro (5989), Debug (0), Beta (4), Signed (0), Restaurant (7), Conference (11), Retail (33), UAT (3), Alpha (30), Showcase (3), and Verifone (0).

Tag	Count
P2Pro	5989
Debug	0
Beta	4
Signed	0
Restaurant	7
Conference	11
Retail	33
UAT	3
Alpha	30
Showcase	3
Verifone	0

## Test Groups and UAT

Internal team members such as UAT will be notified when a new build is available and will need to assign the new application to their devices or group.

## ELOview Functionality

The following ELOview functions can be completed by the Operation, Deployment, and MDM Admin teams. The roles will become more defined as MDM utilization ramps up.

## Device Enrollment

Merchants and Dealers will not have the ability to enroll or move devices between groups. Devices will need to be assigned to a Device group; the Device group identifies which HPOS products will be deployed. Deployment and Operations team members can request a device to be assigned to a different group by emailing the [MDM Admin team](#). Please provide the serial number for any device needing movement.

The following Groups will be available to choose from:

- ▶ Retail Group
- ▶ Restaurant Group

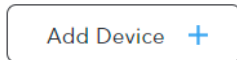
## Enrolling a Device

To receive the correct Heartland POS software, you must add the device to the Heartland ELOview system. This task will be handled by the HPOS Deployment team.

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.



- 3 Select **Add Device**.



If you are adding multiple devices, it is easiest to use the Device Template.



If you are adding a single device, the drop-down option is sufficient.

Device Name	Serial Number	Device Mode Control	▼
Device Name	Serial Number	Device Mode Control	▼ (+)

- 4 Enter a name for the device.
- 5 Enter the serial number of the device.
- 6 Click **Save**.

## Assigning a Device to a Group

If a device is not added or is added to the wrong group, it will not receive the correct Heartland POS software and will need to be moved to the correct group. Use the following steps to add or move devices to groups.

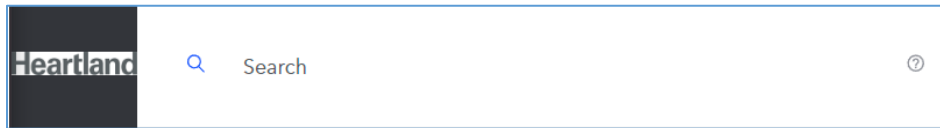
### Assigning a Device

This task is handled by the HPOS Deployment team.

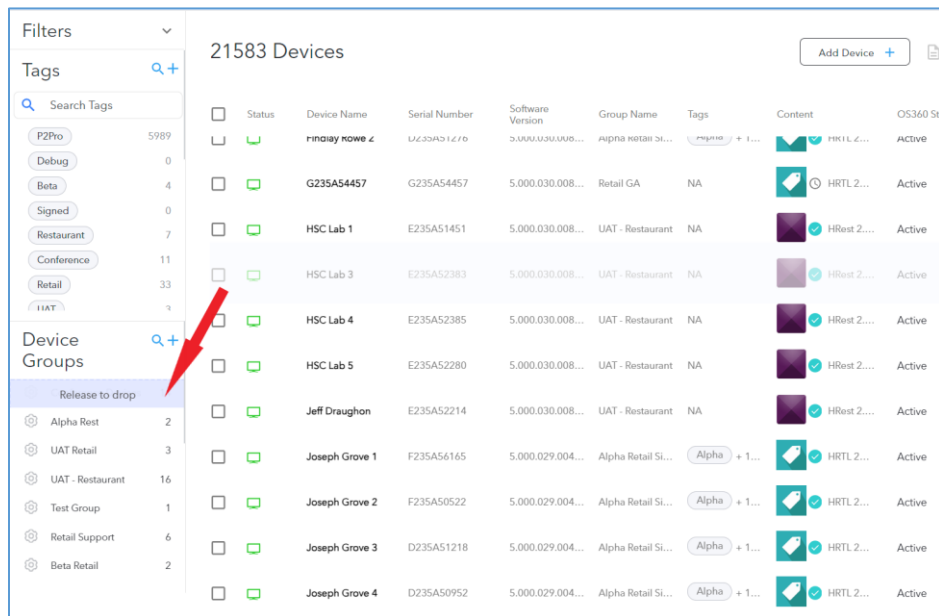
- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.



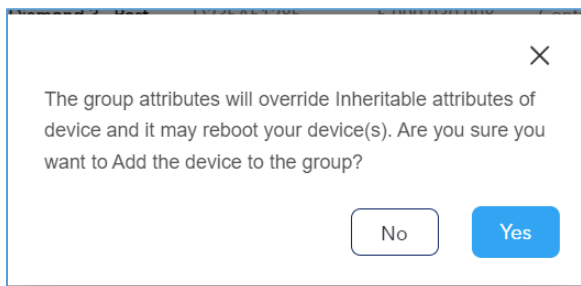
- Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.



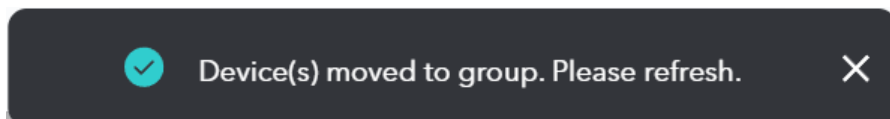
- Click and drag the device into the desired Device Group.



- When prompted, click **Yes**.



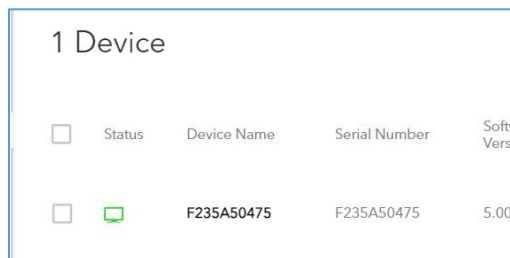
A notification will appear on the bottom to confirm the device was successfully moved.




## Locking a Device

ELOview has the ability to lock devices in the event they are stolen or the merchant ends their partnership with Heartland. When a device has no Group assignment, it will display a message stating that the device has not been configured and directing you to contact Heartland Support.

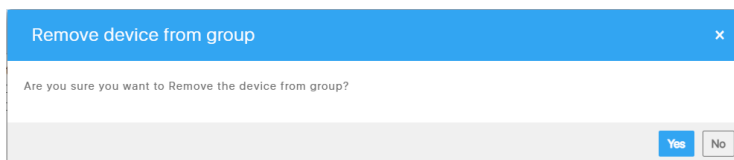
- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.
- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.
- 4 Select the device's check box.



The screenshot shows a table titled "1 Device" with the following columns: Status, Device Name, Serial Number, and Software Version. The first row shows a device with a green status icon, Device Name "F235A50475", Serial Number "F235A50475", and Software Version "5.00". A checkbox is visible to the left of the status icon.

Status	Device Name	Serial Number	Software Version
<input type="checkbox"/> 	F235A50475	F235A50475	5.00

- 5 At the prompt, click **Yes** to confirm the device removal.



The device will disappear from the **Group** list and will display that it has not been configured on the POS screen.

## Resetting a Device

When you perform an Enterprise Reset, the device will return to a fresh installation based on the Device Group it is enrolled in.

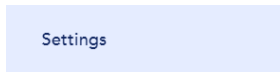
### Remote Enterprise Reset

A Remote Enterprise Reset is usually performed if a device is being returned for service or is experiencing issues. The next time the device powers on and connects to a network, it will receive the Reset command and perform the action. This will remove all current data (including pending uploads) and return the device to the initial setup screen.

**Note:** The Remote Enterprise Reset option is only available for NextGen devices.

- 1 Log into [Heartland ELOview](#).

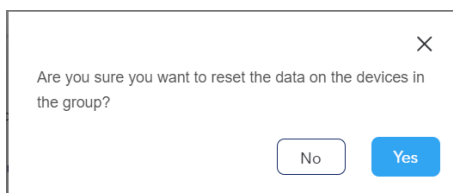
- 2 Navigate to the **Devices** column.
- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.
- 4 Select the device and navigate to the **Settings** tab.



- 5 Click **Enterprise Reset**.



The program will display a verification prompt.



- 6 Click **Yes**.

A notification will display at the top of the screen that the reset was issued successfully.

## Local Factory Reset

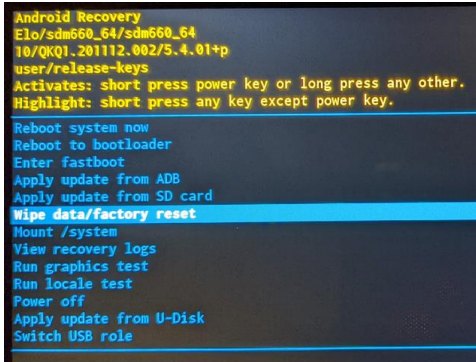
If you have a device failing to receive proper configuration or updates, you might resolve the problem by performing a local factory reset.

- 1 Unplug the device.
- 2 Hold the **HOME** button and reconnect the power.



The **HOME** and **POWER** buttons are located on the underside of the device's screen.

- 3 Continue holding the **HOME** button until the unit starts Android System Recovery.



- 4 Press the **HOME** button to select **Wipe data/Factory reset**.
- 5 Press the **POWER** button to select.
- 6 Press the **HOME** button until **Factory data reset** is selected.
- 7 Press the **POWER** button to confirm the selection.
- 8 After the data wipe is complete, press **HOME** to select **Reboot System Now**.

## Device Logs and Screen Sharing

### Pulling Logs

Device logs can only be accessed within ELOview.

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.
- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.
- 4 Select the device and navigate to the **Software** tab.
- 5 Tap **Upload Logs**.
- 6 Choose the desired range or select **All logs**.

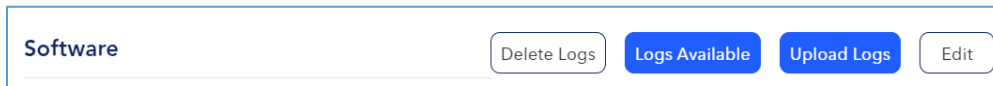
All logs

From	To
May 19, 2024 12:00 AM	May 20, 2024 4:14 PM

\* Device's timezone will be considered for given date range.

## 7 Select **Confirm**.

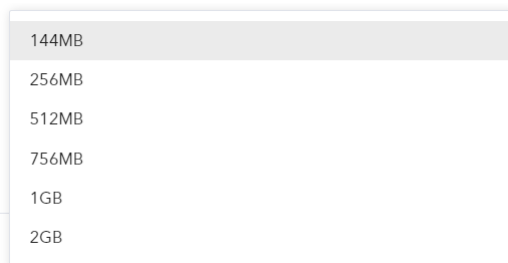
The logs will become available in the Software screen.



## Adjusting Log Size

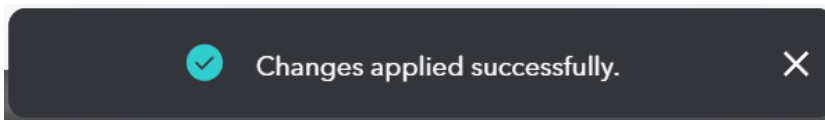
By default, log sizes are set to 144MB, but they can be adjusted as the Support team determines a more desirable size. The current size supports roughly two days of logging, but you can expand that capacity to hold more historical data.

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.
- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.
- 4 Select the device and access the **Software** tab.
- 5 Click **Edit**.
- 6 Navigate to the **Log Storage** list and select a desired amount.



## 7 Select **Confirm**.

A confirmation message will display at the bottom of the screen.



## Using the Screen Shot Feature

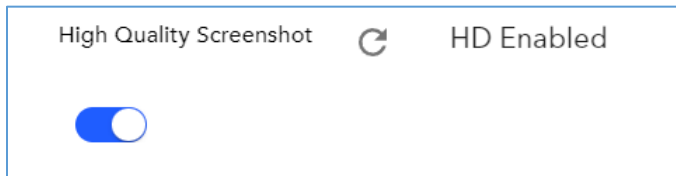
As with the device logs, the screen shot feature is only available within ELOview.

- 1 Log into [Heartland ELOview](#).

- 2 Navigate to the **Devices** column.
- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.

Once selected, you will be taken to the **Info** tab.

- 4 Navigate to the **Activity** section.
- 5 In this section, enable **High Quality Screenshots**.



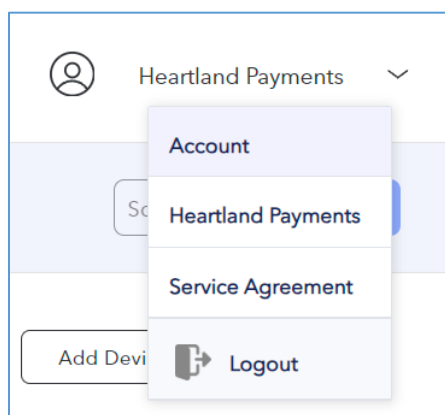
An image of the device's screen will appear. This screen has limited interactive capabilities but can still be used.

## Users and User Settings

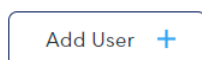
### Adding a User

Only Support and Development staff will be allowed as users. The Leads on those teams will have the ability to add users for team members who report to them.

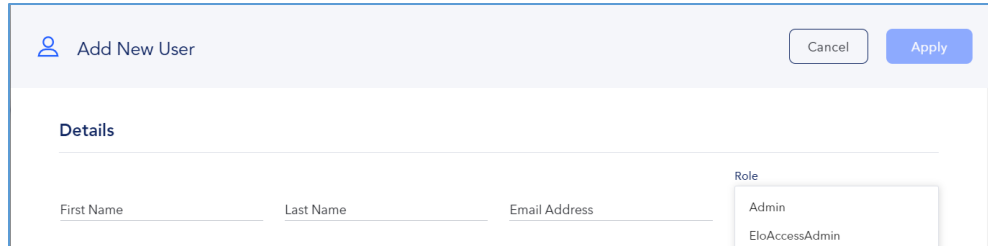
- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Heartland Payments** tab.



- 3 Click **Add User**.



- 4 Enter the user's information and select the desired role.

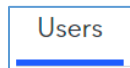


- 5 Click **Apply**.

A confirmation message will display at the bottom of the screen.

## Changing a User's Permission

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Heartland Payments** tab.
- 3 Navigate to the **User** tab.



- 4 Click the **Edit** icon.

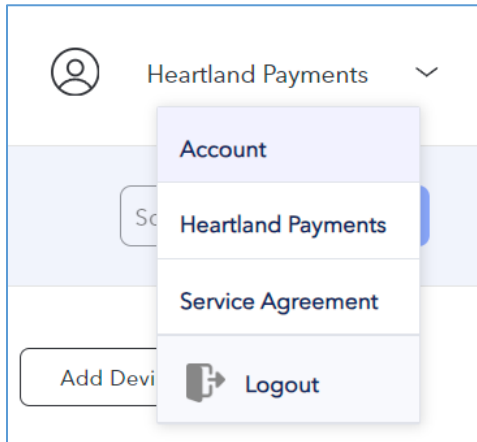


- 5 In the list, select the desired role.
- 6 Select **Apply**.

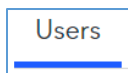
A confirmation message will display at the bottom of the screen.

## Resetting User MFA

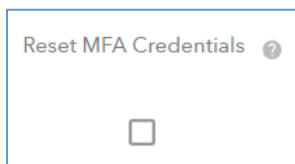
- 1 Log into [Heartland ELOview](#).
- 2 Click the **Heartland Payments** list.



- 3 Navigate to the **Users** tab.



- 4 Find the **Reset MFA Credentials** column and select its check box.

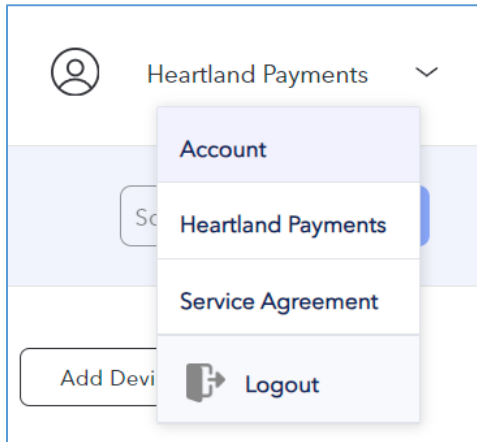


A confirmation message will display at the bottom of the screen.

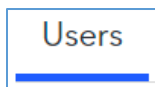
## Deleting a User

If a user needs to be removed from ELOview, these actions can **ONLY** be performed by an Admin member of the MDM team.

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Heartland Payments** tab.



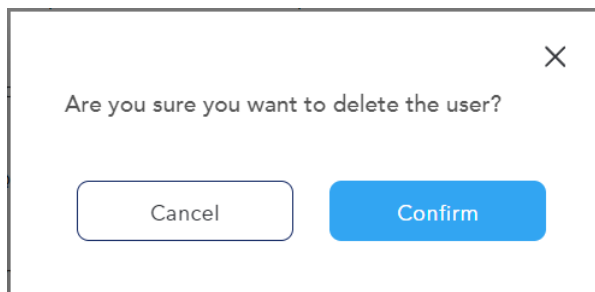
- 3 Navigate to the **User** tab.



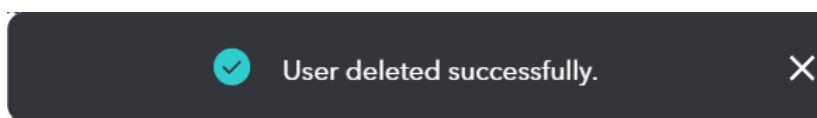
- 4 Find the user and select its **Delete** icon.



- 5 Select **Confirm** on the pop up panel.



A confirmation message will display at the bottom of the screen.



## Development Team

Applications uploaded to ELOview in the **Content** tab can be deployed through ELOview, bypassing the need for a Google account. Contact the [MDM Team](#) with the name of the application and the Deployment Group or serial numbers of the devices in need.

Applications that are only added to ELOview do not show up in the Google Play Store and can only be accessed by devices that are managed by Heartland.

# Change Testing and Deployment

## Change Testing

As a precaution, all changes to individual devices OR device group configurations should be tested and validated in an isolated environment to prevent any impact on the production environment using the Test Group or within the Developer Environment.

An internal tester's device can be assigned to the Test Group the same way a normal device is added. Follow the steps in the "[Assigning a Device to a Group](#)" section and select the Test Device group.

If changes need to be applied to a Device Group, you should test the changes first by applying them to the Test Group or a device enrolled in the Test Group.

If changes need to be applied to an individual device, you should test the changes first on a device assigned to the Test Group or in the Developer Environment.

## Change Deployment

Changes that have been tested and validated for deployment should be scheduled and communicated to the POS Delivery team at [posdelivery@heartland.us](mailto:posdelivery@heartland.us).

All Production-facing changes will be deployed Monday through Wednesday mornings, allowing for proper support and recovery in the event of an issue. Any other weekdays will need approval from the POS Delivery team.

## ELO Rollback

In cases where devices must be removed from ELOview, these actions can ONLY be performed by an Admin member of the MDM team. Devices will be removed in bulk based on the groups they are enrolled in.

## Deleting a Device

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.



- 3 Find the desired device by entering its serial number or device name into the **Search** bar or scrolling through the list.
- 4 Navigate to the **Settings** tab.

Settings

- 5 Click **Edit**.

Edit

- 6 Click **Delete Device**.

Cancel

Delete Device

Apply

A confirmation message will display at the top of the screen.

## Deleting a Device Group

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.
- 3 Select the **Gear** icon next to the group that you are deleting.
- 4 Navigate to the **Settings** tab.

Settings

- 5 Click **Edit**.

Edit

- 6 You can select **Delete the Group only**, or to also include all devices in that group.

Delete Group & Devices

Delete Group

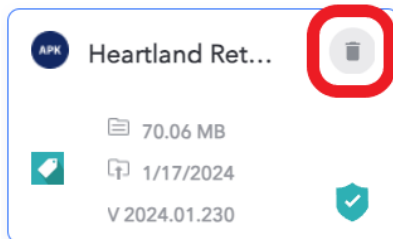
A confirmation message will display at the top of the screen.

## Deleting an Application from a Device

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Devices** column.
- 3 Find the desired device by entering the serial number or device name into the **Search** bar or scrolling through the list.
- 4 Navigate to the **Contents On Device** tab.

A light blue rectangular button with the text "Contents On Device" centered in a dark blue font.

- 5 Find the application you wish to delete, then click the **Delete** icon.



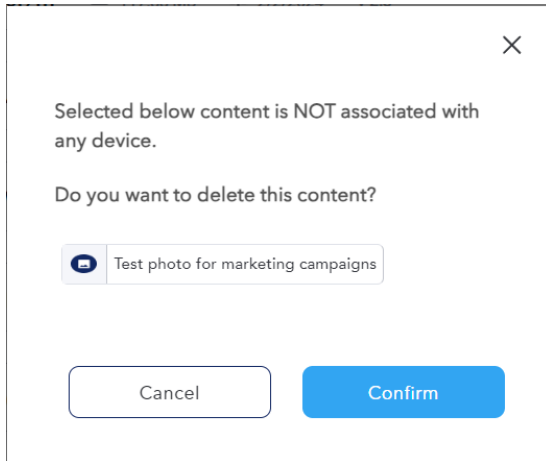
**Note:** Steps to redeploy an application to the device can be found in [“Upgrading Applications to the Latest Build”](#).

## Deleting an Application from ELOview

- 1 Log into [Heartland ELOview](#).
- 2 Navigate to the **Content** column.
- 3 Find the content you wish to delete and click its **Delete** button.

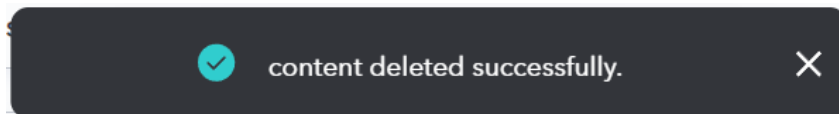


The program will prompt you to confirm your decision.



#### 4 Click **Confirm**.

A confirmation message will display at the bottom of the screen.



## Appendix

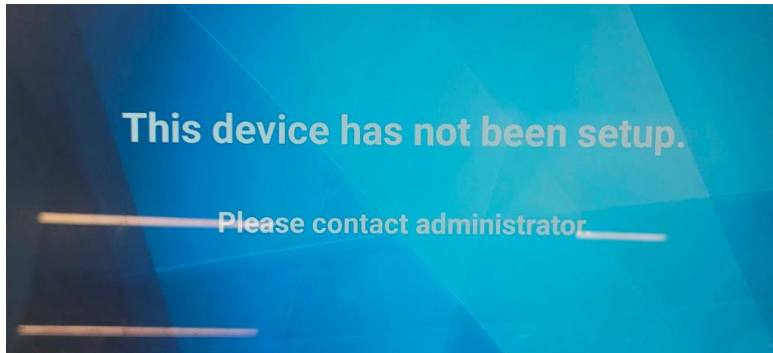
### Blockers & Outstanding Work

#### Blue Error Screens

When running the device for the first time, it might display some error screens while the unit connects to the internet and imports the correct files. If these screens last longer than a few minutes without any change, please consult the steps below.

#### **“This device has not been setup.”**

This error displays when a device has connected to a network but does not have a configuration assigned to it. This can occur when a new device has been added without being assigned to a group, or if a device has been removed from a group, to lock it down, due to a security concern such as theft.



**Default message: “No content is configured for this device.”**

This error occurs when a device has connected to a network and is assigned a group in ELOview, but does not have an application assigned as the Default Content.

