



Heartland

Advanced Training
Menu Building

Sales Engineer Team



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Restaurant: Danielle Valencia, Mathew Turner, & William Anderson

What do we do?

Provide monthly training to dealers, SRMs, and Direct Sales teams

- Help with pre-sales questions
- Assist with live demos

How to Contact Us:

- Email hpossalesengineers@heartland.us
- Access Google calendar to schedule demos
- Send qualifying document to SE when scheduling demos

Agenda

1. Menu Building Basics
2. Building a Menu Item
3. Pricing a Menu Item
4. Sub-Item Overview
5. Combo Item Overview
6. Building a Combo using Sub Items
 - a. Core Menu Items
 - b. Sub-Item Ingredients
 - c. Sub-Item Modifier
 - d. Combo Menu Items

JahOHM GSD

Breakfast La Mexicana Redlands Lunch & Dinner

Appetizers Soups Tacos Street Tacos Burritos Traditional Cuisine Sides E...

Appetizers



Campechana
Campechana recipe is the perfect marriage of plump...
\$11.99



Chilaquiles
Our homemade corn tortilla chips tossed in a warm salsa...
\$8.75



Enchilada
Filled with chile con carne and cheese, these beef...
\$6.00



Flautas
3 Crispy Flautas rolled with chicken in corn tortillas
\$5.50

Soups



Pozole Rojo
Our traditional spicy red pepper version is a holiday...
\$12.99 for Medium



Albondigas
Our simple soup base is made with sautéed onions,...
\$12.99 for Medium

Tacos



Soft Taco



Hard Shell Taco

Menu Building Basics

Item	Location	Short Name	Report Category	Price	
12 Cookies	All	Baked Good	27.46		
4 Cookies	All	Baked Good	9.98		
8 Cookies	All	Baked Good	18.31		
Americano	All	Coffee/Tea	5.00		
Bagel with Cream Cheese	All	Breakfast	4.30		
Bagel with Cream Cheese ...	All	Breakfast	5.35		
Bagel with Cream Cheese ...	All	Breakfast	6.75		
BBQ Bacon Hawaiian Pizza ...	All	Lunch	11.00		
BLT Bagel Sandwich	All	Lunch	9.25		
Breakfast Bagel	All	Breakfast	8.50		
Brown Butter Snickerdoodle	All	Baked Good	2.97		
Cappuccino	All	Coffee/Tea	0.00		

Menu settings can be found on the Admin Portal by navigating to:

Account Menu > Items

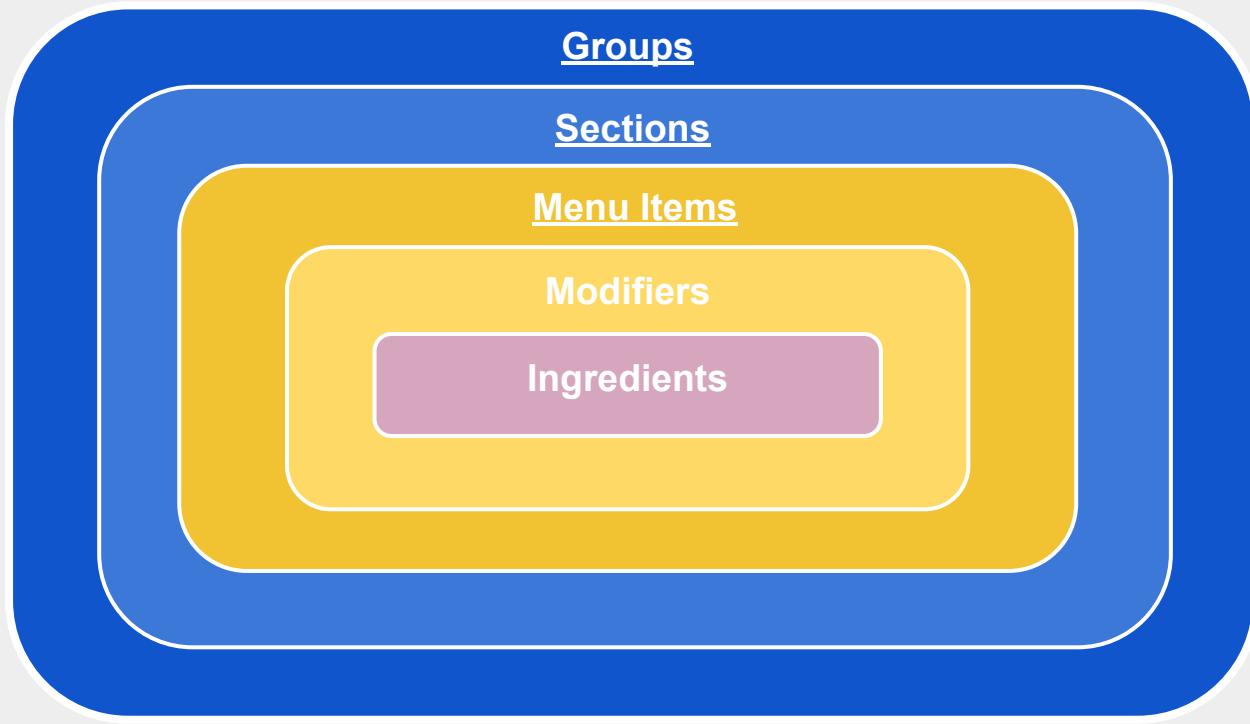
- All menu changes have to be made on the Admin Portal
- Changes must be published from Admin Portal in order to be reflected on the POS

Menu Building Basics

Menu Building Basics

3 areas are required* to be setup for the basic menu structure.

2 additional layers increase item complexity when needed.



* Required settings are underlined on the graphics.

Menu Building Basics

Group Naming Examples:

- Breakfast
- Lunch
- Bar
- Holiday
- Event
- Catering

* Required settings are underlined on the graphics.

Groups

The highest level of the menu structure is Groups which are assigned an assortment of Sections.

Groups can be assigned day and time restrictions as well as a start and end date for seasonal menus on the Heartland Restaurant App.

Online Ordering, Kiosk, and Catering use their own Group selections along with day, start and end times.

Menu Building Basics

Examples:

- Appetizers
- Entrees
- Deserts
- Coffee / Tea
- Beer / Wine
- Burgers
- Steaks
- Sides

Groups

Sections

Sections are the second highest level of the menu structure and are assigned a selection of menu items.

They can be assigned day and time restrictions and must be assigned to a group to appear on the menu.

* Required settings are underlined on the graphics.

Menu Building Basics

Menu Items fields and options dictate how that item functions in the app, gets reported on, etc.

Naming Examples:

- House Salad
- Breadsticks
- French Fries
- BBQ Burger
- BLT Sandwich
- House Merlot
- Cheesecake

* Required settings are underlined on the graphics.

Groups

Sections

Menu Items

Each menu item can be assigned:

<ul style="list-style-type: none">• Tags/Attributes• Sizes• Multiple Modifiers	<ul style="list-style-type: none">• 1 Kitchen Group• 1 Reporting Category• 1 Section
--	--

Menu Items can be assigned day and time restrictions and must be assigned to a section to appear on the menu.

Menu Building Basics

Modifiers can be assigned selection requirements:

- Minimum Required
- Maximum Required
- Included Amount

Enable Half & Half and/or Duplicate Ingredient functionality at the modifier level.

Naming Examples:

- Protein
- Veggies
- Cheeses
- Meat Temp
- Sides
- Bagels

Groups

Sections

Menu Items

Modifiers

Each Modifier is assigned multiple ingredients typically of a similar variety along with their pricing if needed.

Menu Building Basics

Ingredients are preselected at the Menu Item level.

Naming Examples:

- Gouda
- Tomato
- Onion
- Chicken
- Cheddar
- Bluemoon
- Truffle
- Brioche
- Wheat
- Pickle
- Avocado

Groups

Sections

Menu Items

Modifiers

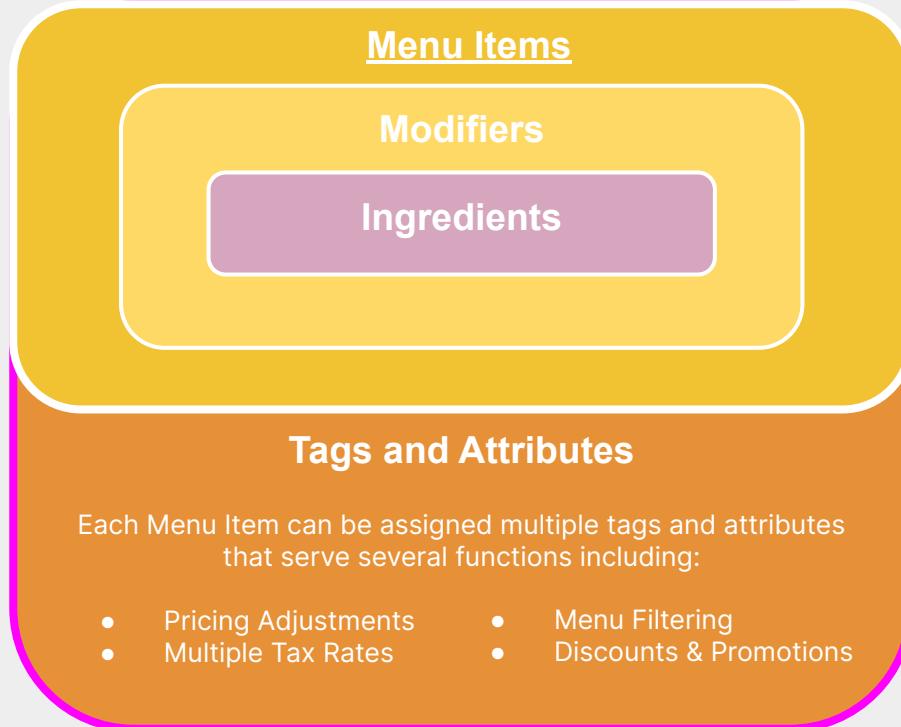
Ingredients

Building a Menu Item

Building a Menu Item

Tags are used to group items together for other functions in the software such as:

- Pricing Rules
- Discounts and Promotions
- Room Level Taxes



Building a Menu Item

Attributes are tags that in addition to their normal functionality allow staff and guests to filter the menu.

Examples:

- Chefs Special
- Contains Nuts
- Gluten Free
- Spicy
- Vegetarian

Menu Items

Modifiers

Ingredients

Tags and Attributes

Each Menu Item can be assigned multiple tags and attributes that serve several functions including:

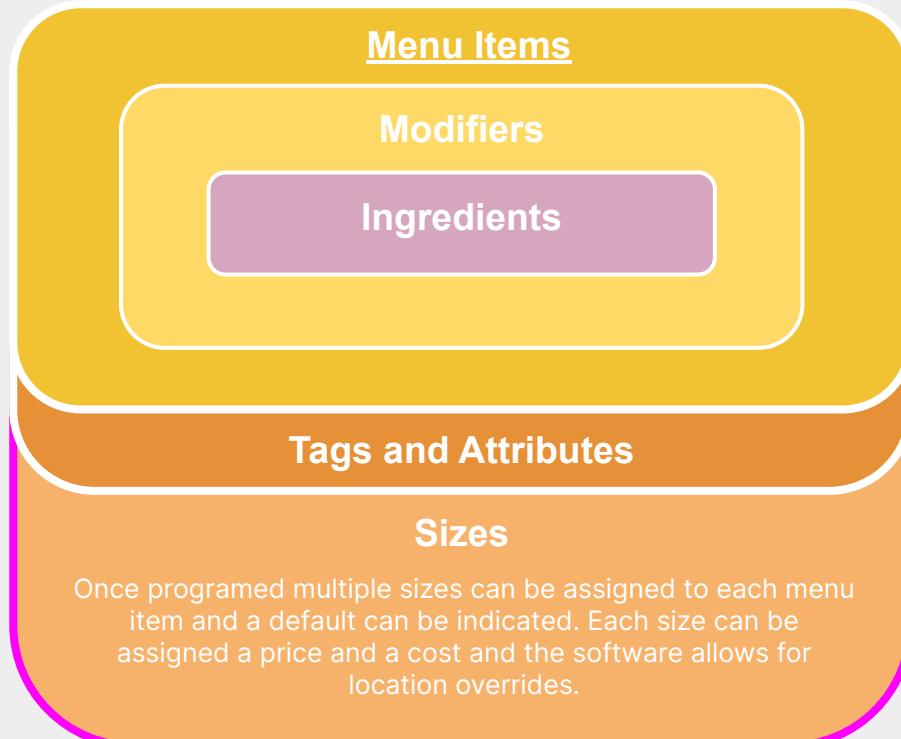
- Pricing Adjustments
- Multiple Tax Rates
- Menu Filtering
- Discounts & Promotions

Building a Menu Item

Size naming Examples:

- Small
- Medium
- Large
- 10 inch
- 12 inch
- 14 inch
- 8 oz
- 12 oz
- 16 oz

Pricing a ingredient based on the size can be programmed at the modifier level.



Building a Menu Item

Kitchen Groups should be named after the station in the kitchen they are representing.

Examples:

- Expo
- Grill
- Fry 1
- Fry 2
- Salad



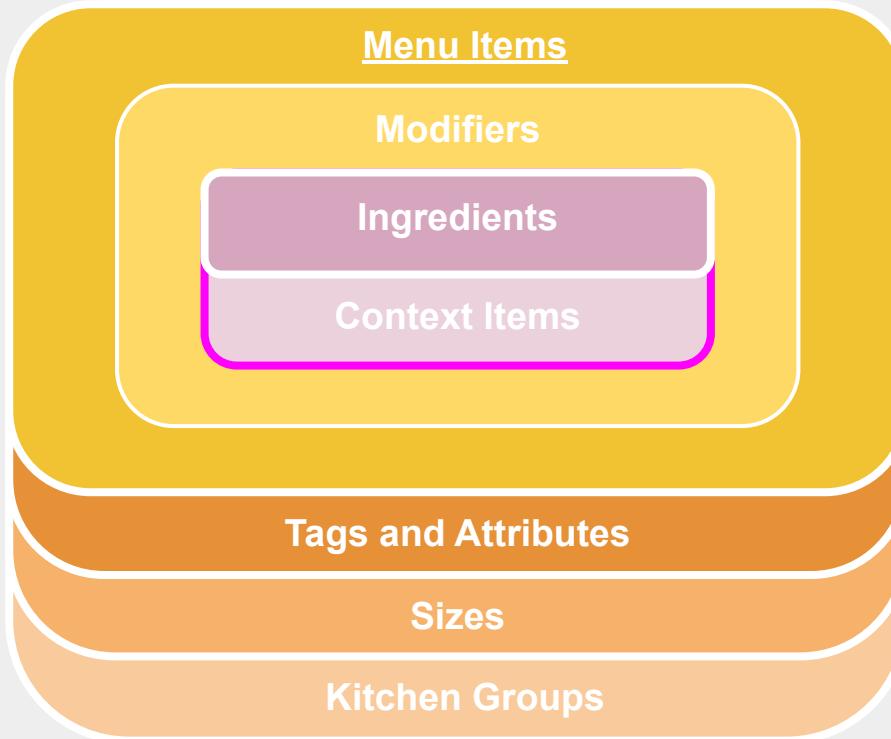
Building a Menu Item

Context Items describe how an ingredient should be prepared and are assigned to ingredients.

Multipliers can be assigned per ingredient allowing granular price adjustments when needed.

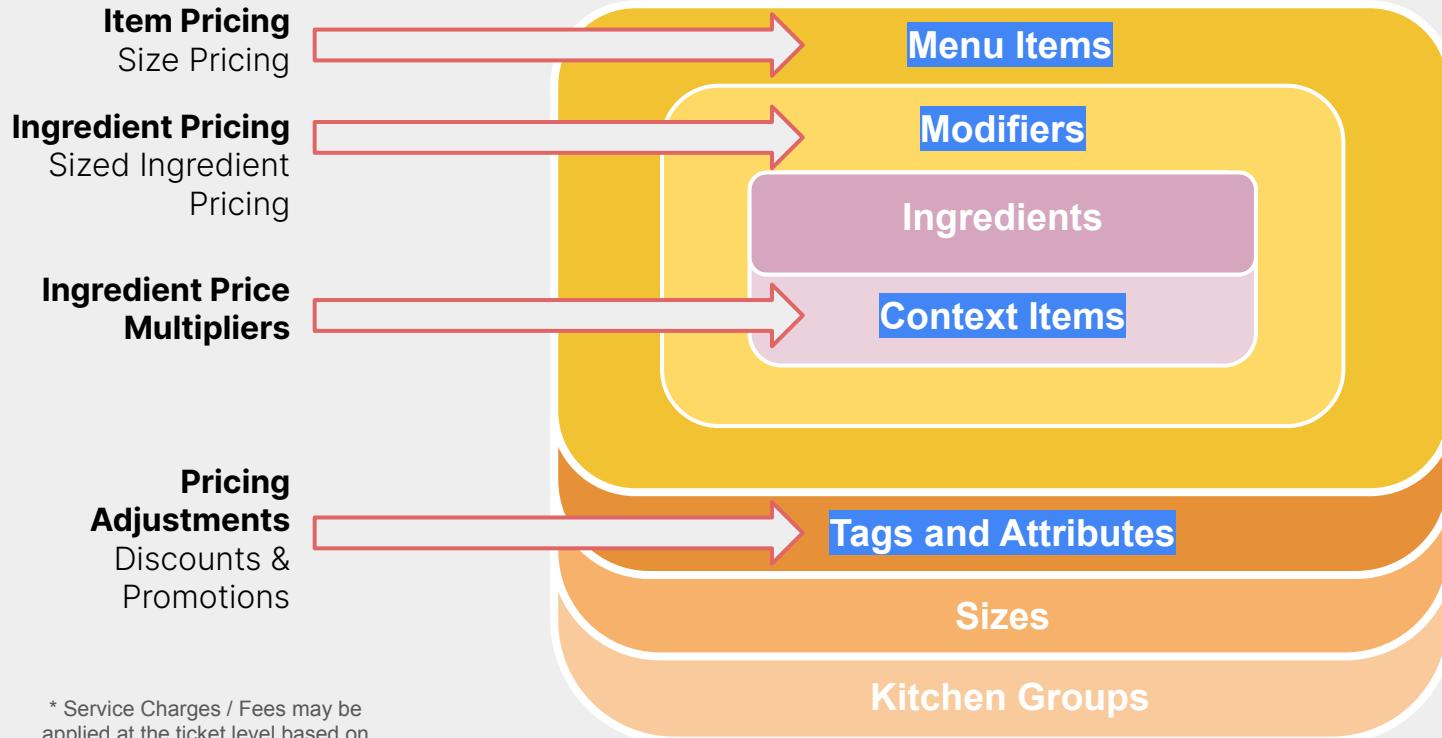
Examples:

- Extra
- Light
- On-Side
- Crispy



Pricing a Menu Item

Pricing a Menu Item



* Service Charges / Fees may be applied at the ticket level based on certain defined criteria

Location Overrides

2 Topping Pizza Location Availability					X
Location	Price	Kiosk/Skip The Line	Online	In-Store	
Advanced Training Demo	Price	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Advanced Training Demo 2	Price	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

When on the Account Level of the Admin Portal, items will have a “Location Override” option.

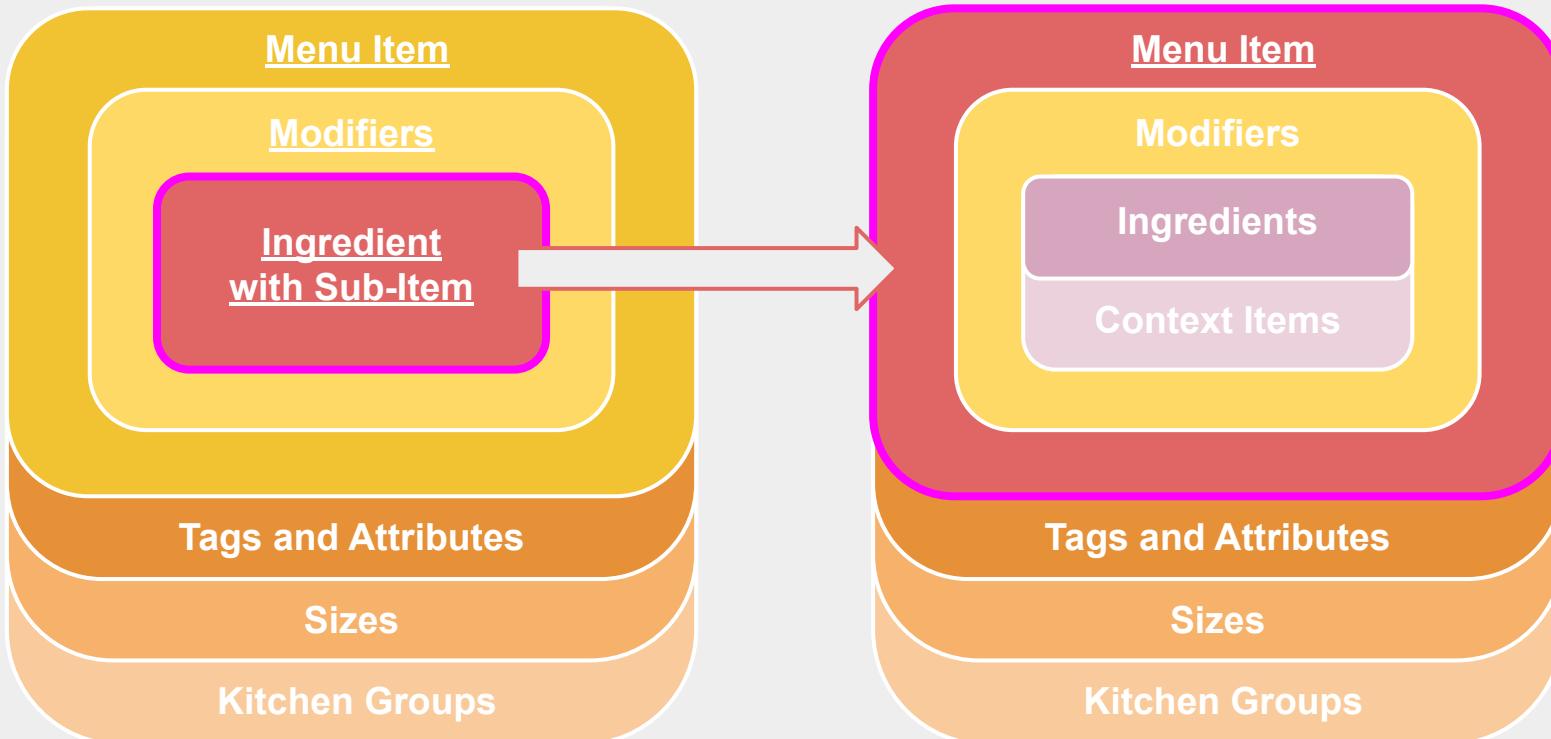
This will allow you to adjust the price, and availability of the item.

- Price: This will only affect the Default Price of the item, and not size prices.
- The check boxes will determine whether that item is available for Kiosk/Skip the Line, Online, or In-Store. If In-Store is unchecked, they will not have access to that item on the POS.

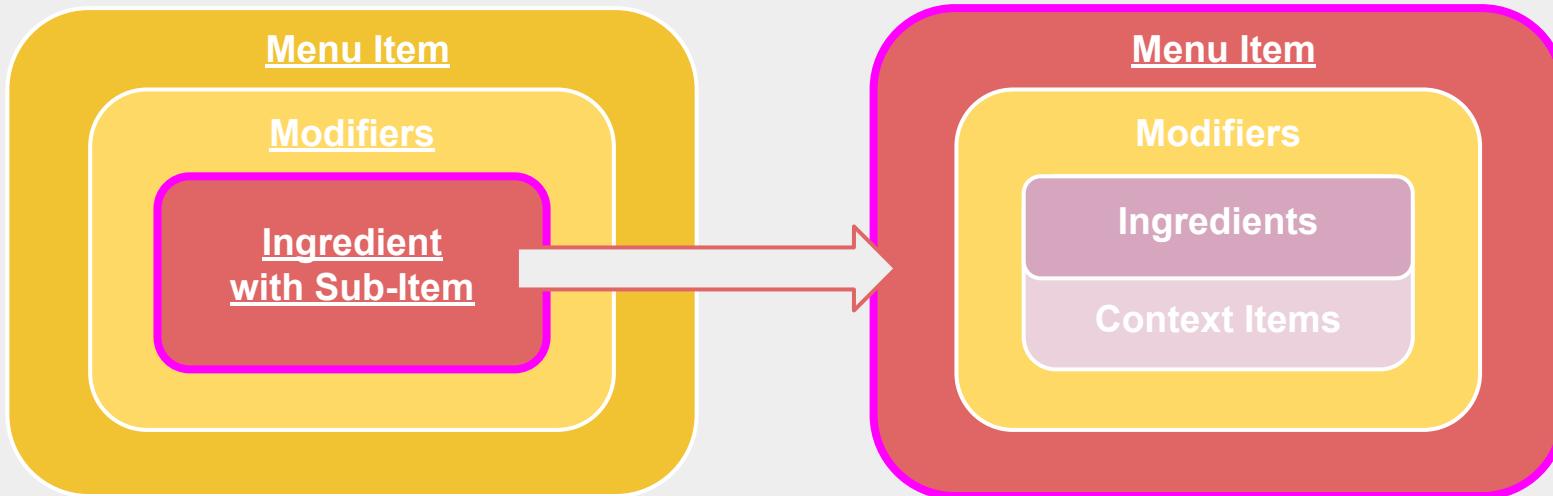
Sub-Item Routing

Sub Item Routing

* Required settings are underlined on the graphics.



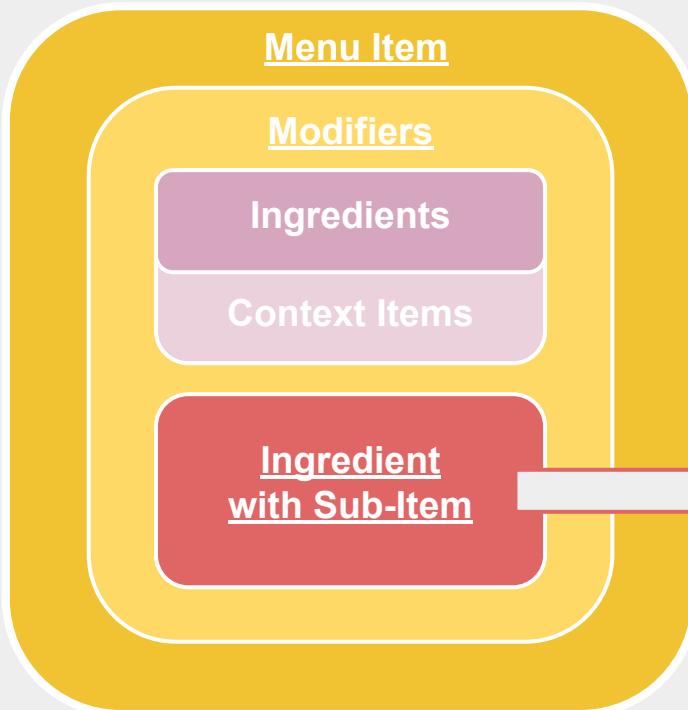
Sub Item Routing



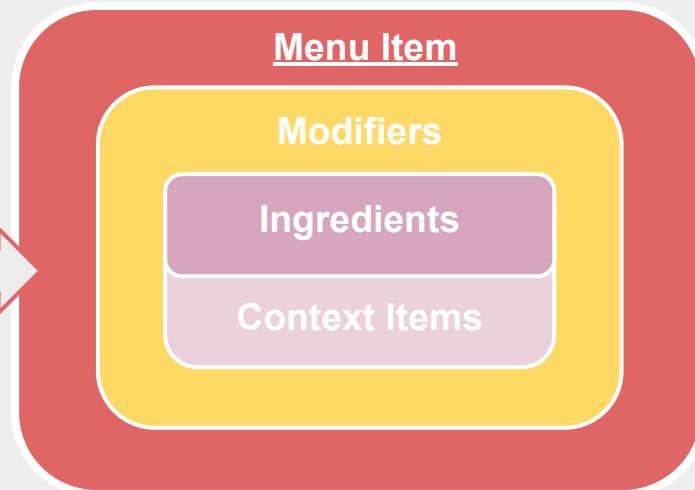
Create a new ingredient and select the menu item it should link to in the Sub-Item dropdown selection. When selected a new tab will appear allowing for sub-item modifications to be made.

* Required settings are underlined on the graphics.

Sub Item Routing



Using Ingredient Sub-Item routing we are able to add another layer of complexity to our menu items programming.



Building With Sub-Items

Entree with Side Choices

Main Entree Item

Modifier 1 - Main Item Choices

Ingredient

Ingredient

Ingredient

Modifier 2 - Side Item Choices

Ingredient
with Sub-Item

Ingredient
with Sub-Item

Ingredient
with Sub-Item

Entree with Side Choices

Tomahawk Steak with a Side

Modifier 1 - Meat Temp

Rare

Medium

Well Done

Modifier 2 - Side Item Choices

Lyonnaise
Potatoes

Creamed Spinach
and Parsnips

Parmesan Roasted
Asparagus

Combo with a Side

Combo Menu Item

Modifier 2 - Main Item Choices

Ingredient
with Sub-Item

Ingredient
with Sub-Item

Ingredient
with Sub-Item

Modifier 1 - Side Item Choices

Ingredient

Ingredient

Sub-Item

Combo with a Side

2 Tacos and a Side

Modifier 2 - Choose 2 Tacos

Carne Asada
Taco

Chipotle Chicken
Taco

Baha Fish
Taco

Modifier 1 - Choose a Side

Rice and Beans

Corn on the Cob

Chips and Salsa

Buy 1 Get 1 Combo Special

Combo Menu Item

Modifier 2 - 1st Item Choices

Sub-Item

Sub-Item

Sub-Item

Modifier 2 - 2nd Item Choices

Sub-Item

Sub-Item

Sub-Item

Buy 1 Get 1 Combo Special

Large Pizza Pasta Family Special

Modifier 2 - Large Pizza

Custom Pizza

Meat Lovers Pizza

Vegetarian Pizza

Modifier 2 - Pasta Options

Marinara Pasta

Carbonara Pasta

Pesto Pasta