

Heartland

Restaurant

NextGen Setup Guide

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Date	Version	Author	Summary
05/24/2024	1.0	JWD	Original document introduced.
07/08/2024	1.0	JWD	Sections added for connecting card readers, and configuring for gift card and Portico Direct service.

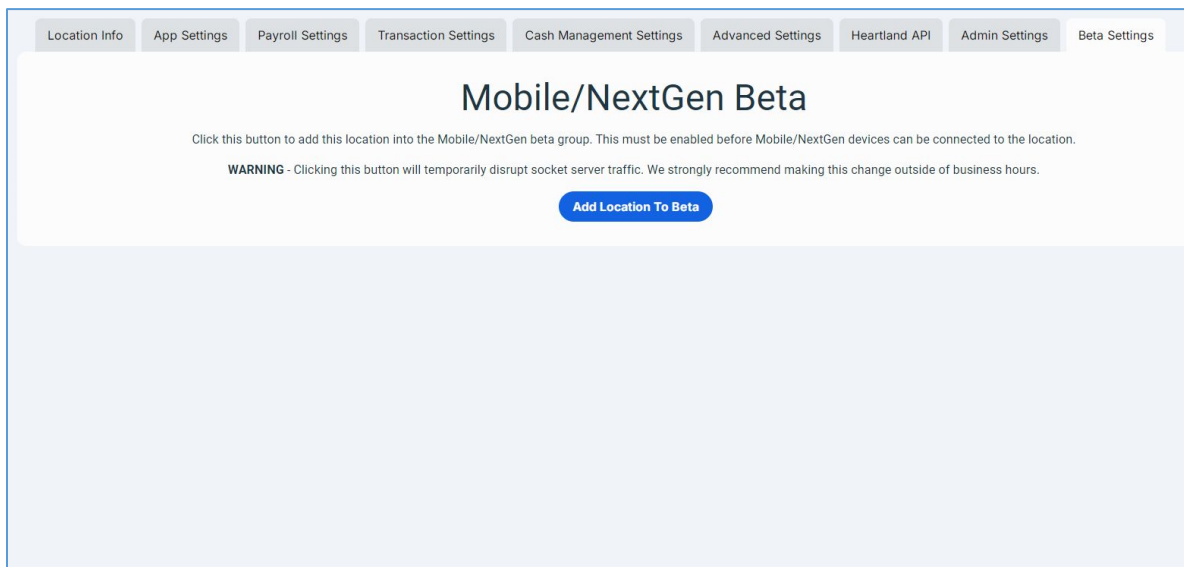
Overview

This article describes how to configure a Heartland Restaurant location to use the Heartland Restaurant's NextGen POS solution, running on NextGen payment devices. It also describes how to perform various tasks and transactions with the NextGen POS after it is configured.

Enabling a Location to Use NextGen POS

Before a location can use the NextGen POS, you must enable the location to use it in the Admin Console.

- 1 Log into the Admin Console, and access the appropriate account and location.
- 2 In the Admin Console's Main Menu, click **Location Setup**.
- 3 In the Location Settings screen, click the **Beta Settings** tab.
- 4 In the **Beta Settings** tab, click **Add Location to Beta**.



Once enabled, you must "force" close and restart the Pay App on any non-NextGen devices on the network. This will reset their socket connections and avoid performance disruptions.

Connecting Card Readers and Printers

Connecting the CFD Device to the NextGen Device

- 1 Turn the CFD device over and unspool its power cable.



The power cable uses a USB-C connection.



- 2 On the back side of the NextGen device, slide the back panel off.



This will reveal a USB-C printer port labeled **CFD**.



- 3 Plug the CFD's power cable into the CFD printer port.



- 4 Replace the back panel, threading the CFD cable through the panel's access hole.



- 5 Power on the NextGen device, and log into the POS.

When you log into the POS on the NextGen device, the CFD device will display a smaller version of the POS screen.



Configuring the NextGen Device's Screen Density

For the CFD device to display properly, you must modify the NextGen device's default setting for screen density.

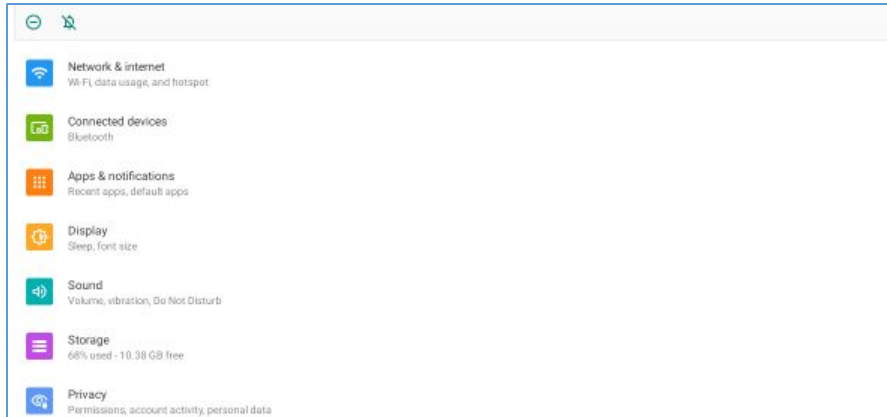
- 1 In the NextGen device, tap the **Home** button.



The device will display the Apps screen.

- 2 In the Apps screen, tap the **Settings** icon.

- 3 In the Settings screen, tap **Display**.



- 4 In the Display Settings screen, tap **Advanced**.

The program will display additional controls for display settings.

- 5 Tap **Screen density**, then select **160 MDPI**.



The app will display a prompt to reboot the device.



- 6 Tap **REBOOT NOW**.

The NextGen device will restart and apply the new screen density.

Updating the CFD Firmware

Before using the Heartland Restaurant app, you must run two utilities.

- 1 Press the **Home** button (at the bottom of the screen) to exit the POS and return to the desktop.
- 2 Tap the **ELO** icon to run the MB5500 FW application to update the firmware on the device.

The application will run automatically and close once it is finished.

- 3 Tap the **Android** icon to run the Enable MultiClient Input application.

The application will run and restart the device when completed. When the device reboots, it will restart the Heartland Restaurant application automatically

Connecting the Receipt Printer

- 1 Facing the back of the receipt printer, turn the device upside down.



Under the printer, along its back side, you will find a collection of ports, including an Ethernet port, a USB-B port, and a USB-A port. You will also find the port for the device's power cable.



- 2 Find the device's data cable.

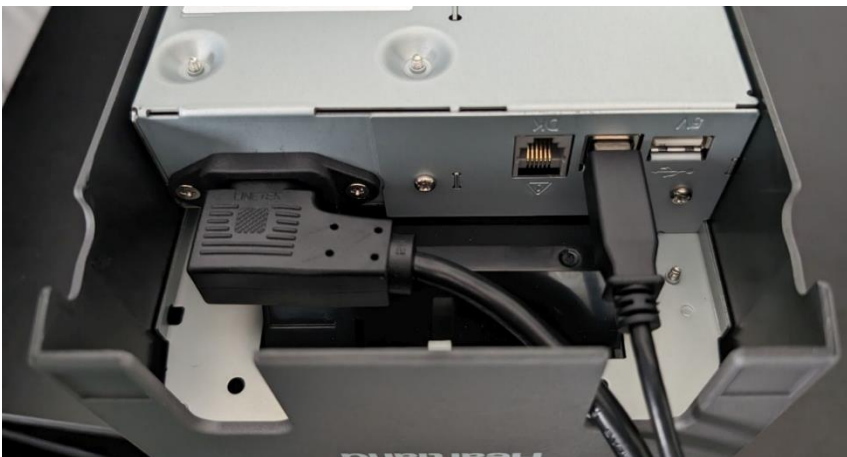


The data cable features a USB-B connector on one end and a USB-A connector on the other end.

- 3 Plug the USB-B end of the data cable into the printer's USB-B port.



- 4 Plug the device's power cable into the AC port.



- 5 Thread both cables through one of the access holes in the printer's casing.



- 6 Facing the front of the printer, push back the right-hand lever along the top of the device and open the paper feed.



- 7 Insert the printer's paper roll in the device, unrolling it from the bottom out over the front of the device.

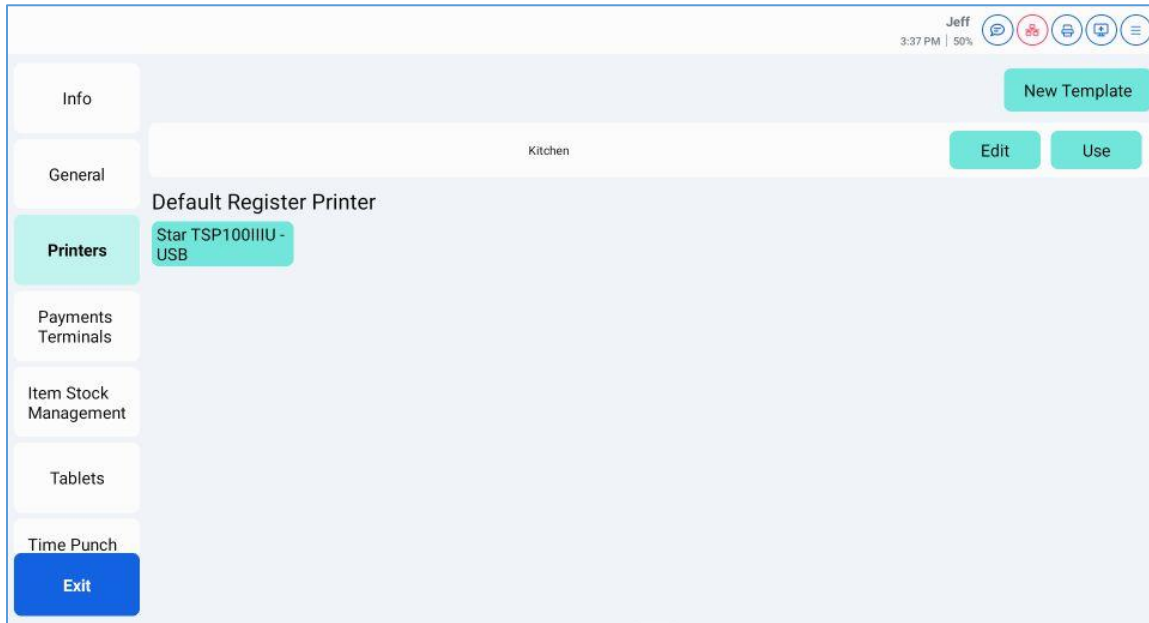


- 8 Close the paper lid until it snaps shut.



- 9 Turn on the printer by flipping its power switch.

The receipt printer is functional, and you can now log into the POS and associate the printer with a printer template, as described in the earlier section on “Setting a Printer Template for the Device”.



Connecting the Verifone T650 Device

The following procedures describe how to connect a Verifone T650 payment device to a NextGen POS station.

NOTE: You cannot run both Verifone T650 devices and PAX devices on the same network.

Attaching the Verifone's Power Cable

- 1 Turn the Verifone device upside down.



- 2 On the underside of the device, press the lock button and slide off its bottom panel.



Removing the panel will reveal a variety of connection ports (two Ethernet ports, one USB-A port, and one USB-C port).



- 3 Plug the device's power cable into the AC port.



- 4 Once connected, thread the power cable through the access slots near the top of the device.



- 5 Slide the bottom panel back into place, until it snaps shut.



Connecting the Verifone to the Location's Wi-Fi Network

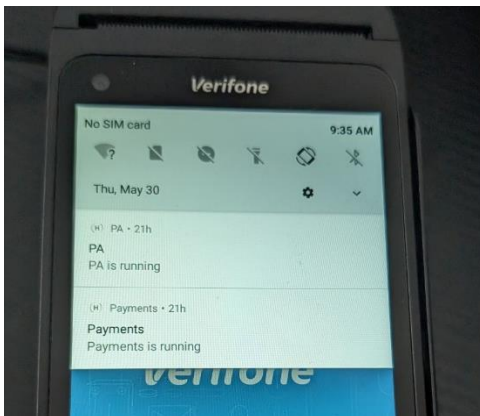
- 1 Turn on the Verifone device. (Press and hold the **Power** button along the left edge of the device.)

Allow the device a few minutes to load and run the necessary apps.

- 2 Once the Payments app is running, tap the **Home** button.



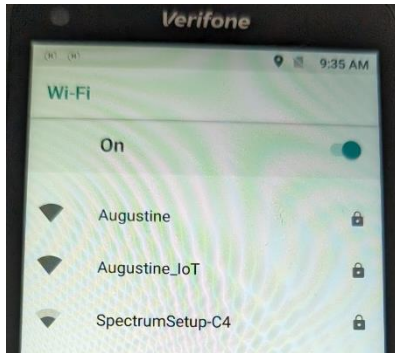
- 3 Swipe down from the top of the screen.



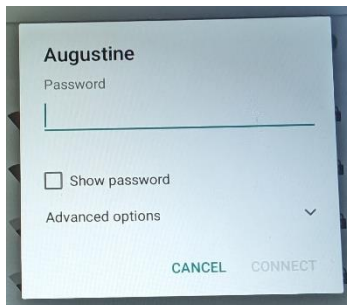
- 4 In the top panel, press and hold the Wi-Fi icon.



- 5 In the Wi-Fi screen, select the location's Wi-Fi network.



- 6 When prompted, enter the Wi-Fi password, then tap **Connect**.



The Verifone device will connect to the location's network.

Setting a Static IP Address via Ethernet

- 1 In the Home screen, swipe up from the bottom of the screen.
- 2 In the Apps screen, tap **Settings**.
- 3 Tap **Network and Internet**.
- 4 Tap **Advanced Options**.
- 5 Set the **Ethernet** setting to **Static**.

The app will display additional controls in the **IP Settings** area, enabling you to enter dedicated values for these settings:

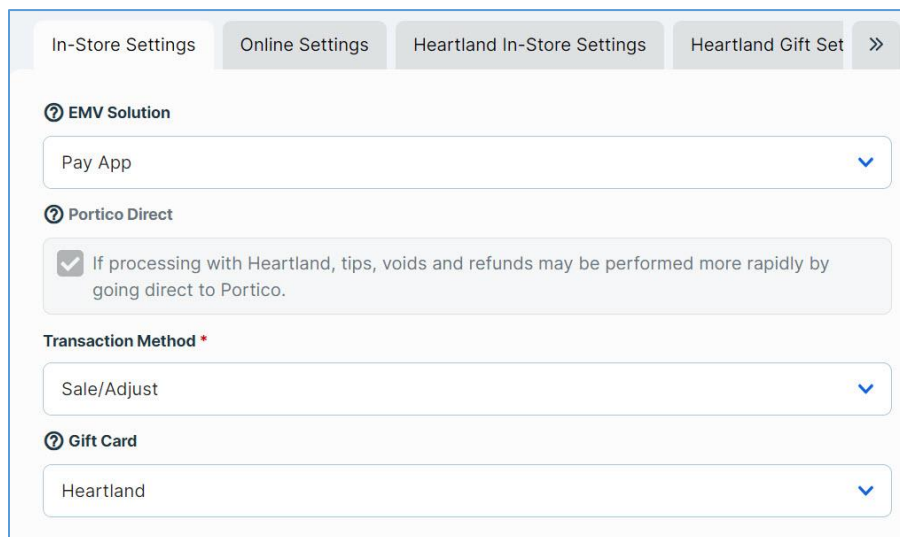
- ▶ **IP Address:** the address of the device on the network.
- ▶ **Gateway ID:** the router's default gateway address.
- ▶ **Network Prefix Length:** Classified by the number of IP addresses assigned on the network or subnet. The default value is 24.
- ▶ **DNS 1:** The default setting is "8.8.8.8".
- ▶ **DNS 2:** The default setting is "8.8.4.4".

- 6 After entering the necessary network settings, tap **Save**.

Configuration for Gift Card

If the location offers gift card service, you must configure the location to process gift card transactions in Heartland's Admin Console.

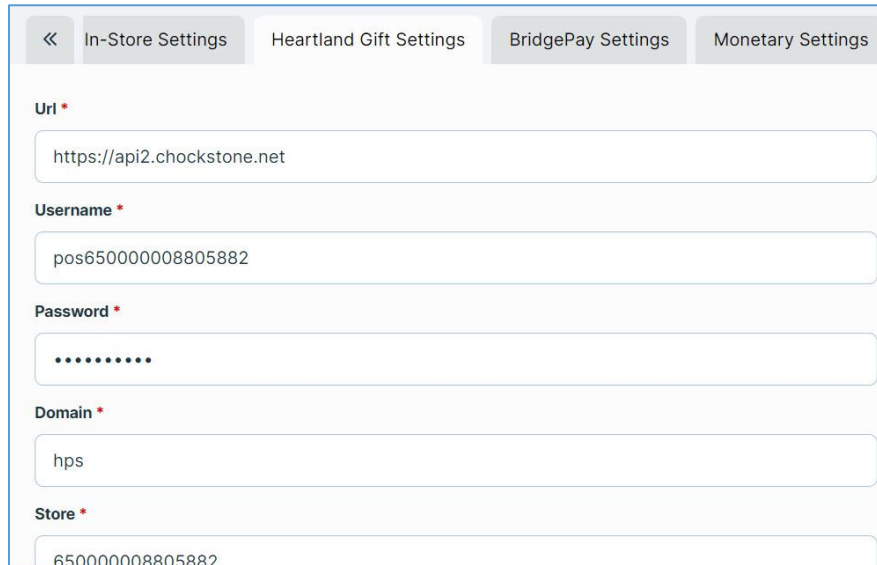
- 1 In the Admin Console, access the appropriate location.
- 2 In the Admin Console's Main Menu, click **Location Setup**, then click **Payment Gateway**.
- 3 In the Payment Gateway screen, on the **In-Store Settings** tab, select **Heartland** in the **Gift Card** list.



The screenshot shows the 'In-Store Settings' tab selected in the Admin Console. The settings are as follows:

- EMV Solution:** Pay App
- Portico Direct:** If processing with Heartland, tips, voids and refunds may be performed more rapidly by going direct to Portico.
- Transaction Method *:** Sale/Adjust
- Gift Card:** Heartland

- 4 Click the **Heartland Gift Settings** tab.
- 5 Enter the following necessary credentials:
 - ▶ **URL**
 - ▶ **Username**
 - ▶ **Password**
 - ▶ **Domain**
 - ▶ **Store ID**



The screenshot shows the BridgePay Settings page in the Heartland Admin Console. The page has a navigation bar with tabs for In-Store Settings, Heartland Gift Settings, BridgePay Settings (selected), and Monetary Settings. Below the navigation bar, there are several input fields:

- Url ***: A text input field containing the URL `https://api2.chockstone.net`.
- Username ***: A text input field containing the username `pos650000008805882`.
- Password ***: A password input field with masked characters (dots).
- Domain ***: A text input field containing the domain `hps`.
- Store ***: A text input field containing the store ID `650000008805882`.

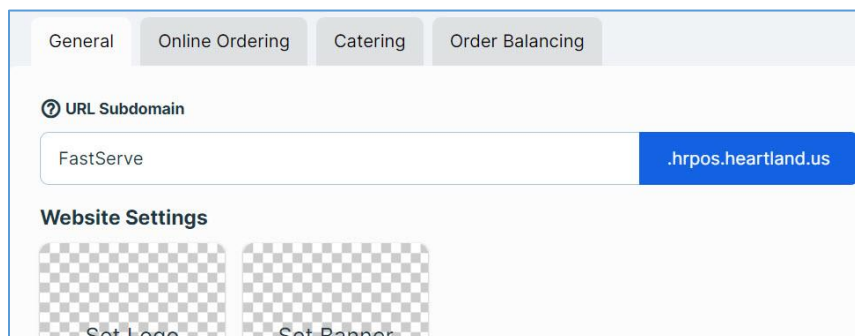
- 6 Click **Save** to save your settings.

Configuration for Portico Direct

If the location uses the Heartland Portico service, you must configure the location in Heartland's Admin Console.

- 1 In the Admin Console's Main Menu, click **Location Setup**, then click **Online Ordering**.
- 2 In the Online Ordering screen, on the **General** tab, verify that the location has Online Ordering enabled.

The location should have a subdomain address entered in the **URL Subdomain** box.

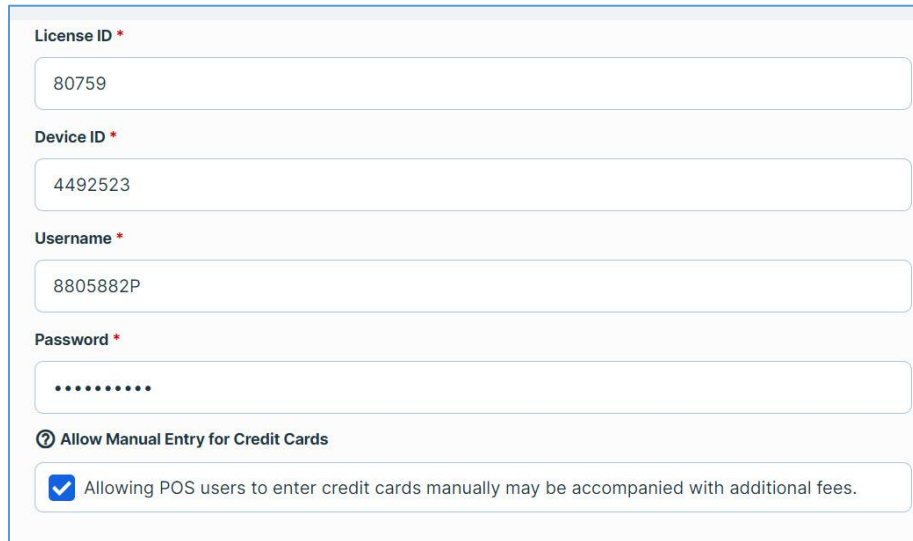


The screenshot shows the Online Ordering settings page in the Heartland Admin Console. The page has a navigation bar with tabs for General, Online Ordering (selected), Catering, and Order Balancing. Below the navigation bar, there are several sections:

- URL Subdomain**: A text input field containing the subdomain `FastServe` and a blue button with the text `.hrpos.heartland.us`.
- Website Settings**: Two placeholder images for a logo and a banner, each with a "Set" button below it.

- 3 In the Admin Console's Main Menu, click **Payment Gateway**.
- 4 In the Payment Gateway screen, click the **Heartland In-Store Settings** tab.

- 5 In the **Heartland In-Store Settings** tab, select the **Allow manual entry for credit cards** check box.



License ID *

80759

Device ID *

4492523

Username *

8805882P

Password *

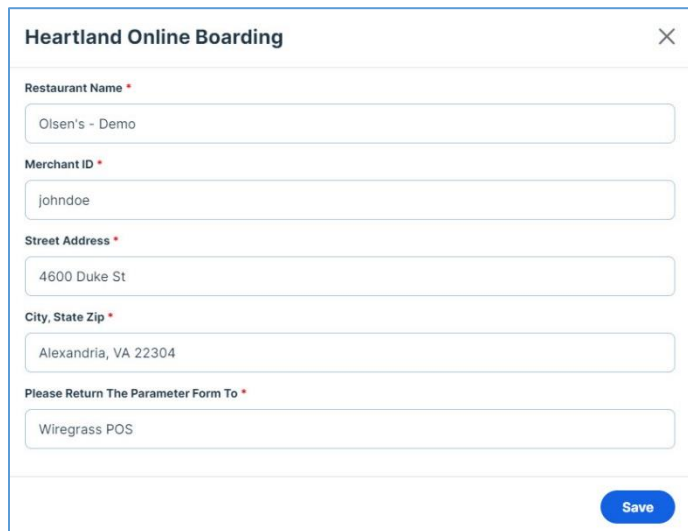
.....

ⓘ Allow Manual Entry for Credit Cards

Allowing POS users to enter credit cards manually may be accompanied with additional fees.

- 6 Click the **Online Settings** tab.

The program will display the Heartland Online Boarding Panel.



Heartland Online Boarding

Restaurant Name *

Olsen's - Demo

Merchant ID *

johndoe

Street Address *

4600 Duke St

City, State Zip *

Alexandria, VA 22304

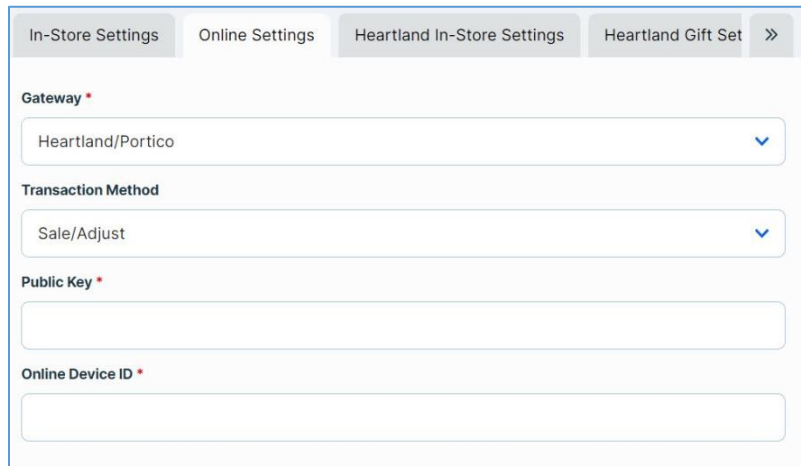
Please Return The Parameter Form To *

Wiregrass POS

Save

- 7 In the panel, enter the following necessary credentials:
 - ▶ **Restaurant Name:** Enter the location's name.
 - ▶ **Merchant ID:** Enter the location's merchant ID number.
 - ▶ **Street Address:** Enter the location's street address.
 - ▶ **City, State, ZIP:** Enter the location's city, state, and ZIP code.
 - ▶ **Please Return the Parameter Form to:** Enter the name of the dealership where Heartland staff should return the boarding form.

- 8 Click **Save**.
- 9 After the panel closes, enter the remaining credentials in the **Online Settings** tab.



The screenshot shows the 'Online Settings' tab selected in a settings menu. The menu includes 'In-Store Settings', 'Online Settings', 'Heartland In-Store Settings', and 'Heartland Gift Set'. The 'Online Settings' section contains four fields: 'Gateway' (dropdown menu with 'Heartland/Portico' selected), 'Transaction Method' (dropdown menu with 'Sale/Adjust' selected), 'Public Key' (empty text input field), and 'Online Device ID' (empty text input field).

- 10 Click **Save** to save your settings.

Configuring the NextGen Device

Powering Up the Device

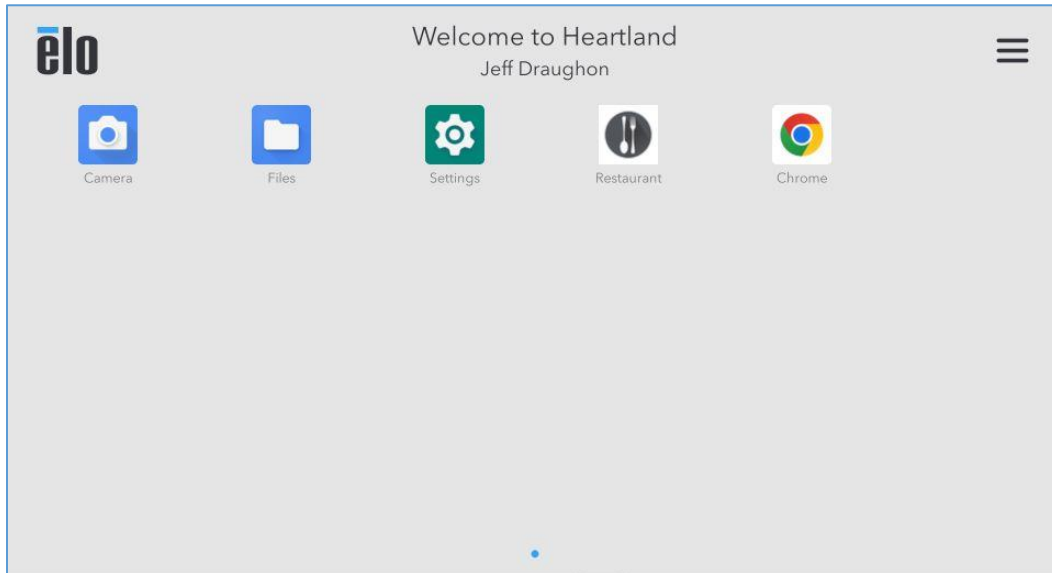
Press and hold the Power button (on the underside of the screen). Once the NextGen device powers up, it will display its Home screen.

Connecting to the Location's Wi-Fi Network

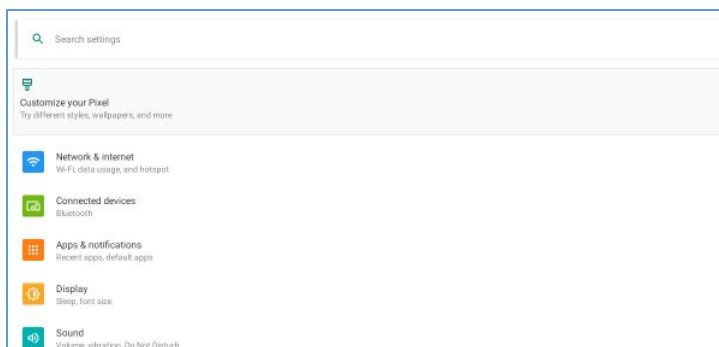
Before running any apps on the NextGen device, you must connect it to the location's Wi-Fi network.

Note: NextGen devices do not support WPA3 security standard. When connecting a NextGen device to a location's Wi-Fi network, use either the WEP or WPA2 security standards.

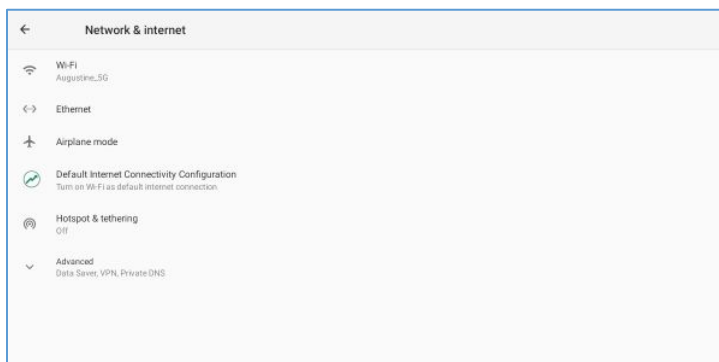
- 1 Access the NextGen Home screen.



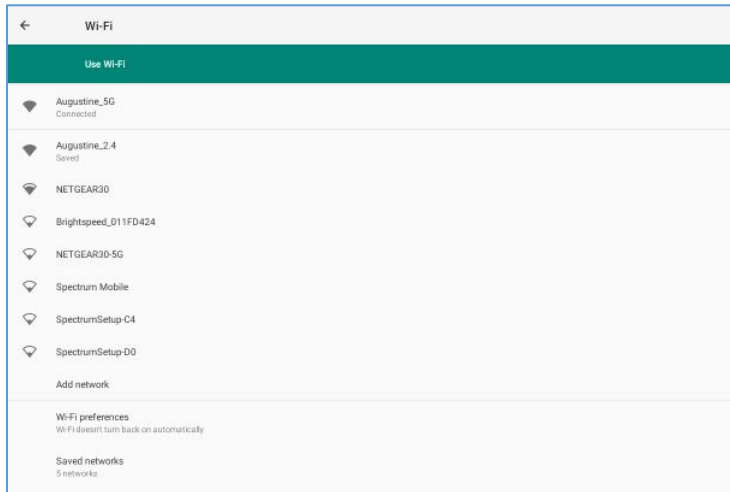
2 Tap the **Settings** icon.



3 In the Settings screen, tap **Network & internet**.

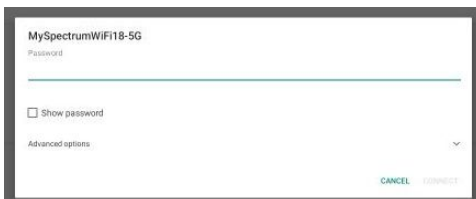


4 In the Network & internet screen, tap **Wi-Fi**.



- 5 In the Wi-Fi screen, select the network that the device will use.

The ELO will prompt you for the network's password.



- 6 In the **Password** box, enter the network's password, then tap **Connect**.

The device should now be connected to the location's Wi-Fi network.

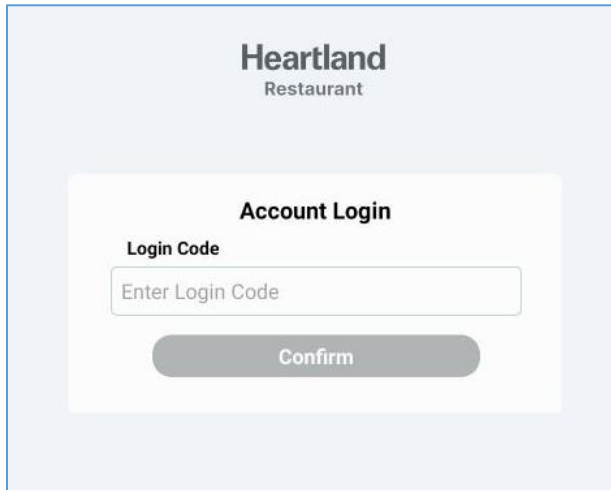
Running the Restaurant App

- 1 Access the NextGen Home screen by tapping the **Home** button in the bottom panel.



- 2 In the NextGen Home screen, tap the **Restaurant** icon.

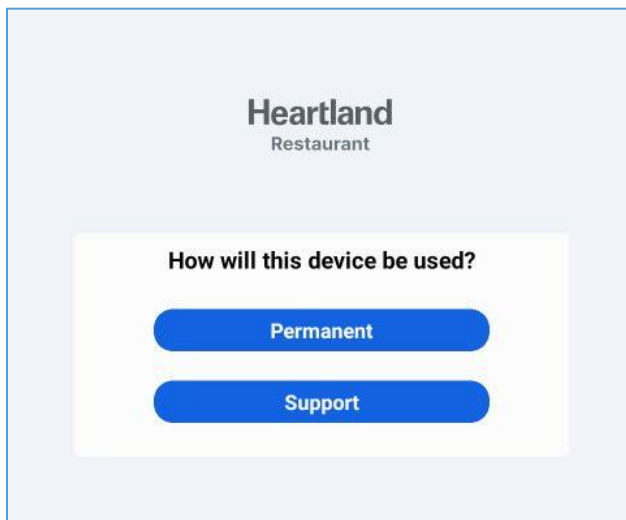
The Restaurant POS app will display a prompt for a Device Login Code.



- 3 Enter a valid Device Login Code, then tap **Confirm**.

If you do not already have a valid Device Login Code for the location, you can acquire one in the Admin Console. For detailed instructions on acquiring a Device Login Code, review our [“Multi-Factor Authentication User Guide”](#).

After submitting a login code, the POS will prompt you to specify how the device will be used.

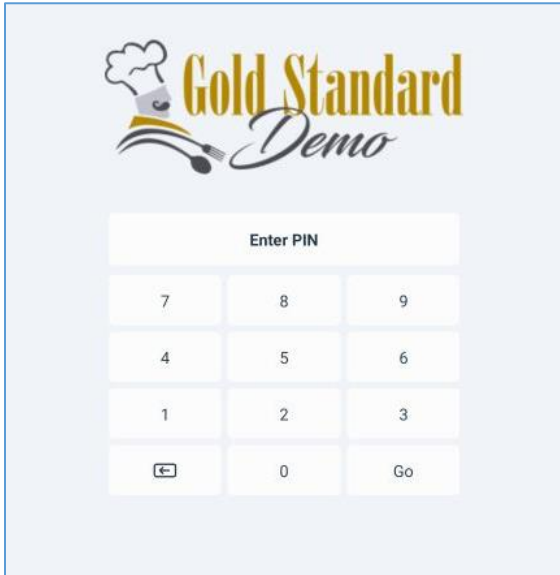


- 4 Tap **Permanent**.

The Restaurant app will then display the Login screen.

- 5 Enter valid email and password credentials.
- 6 Select the appropriate location, then tap **Next**.

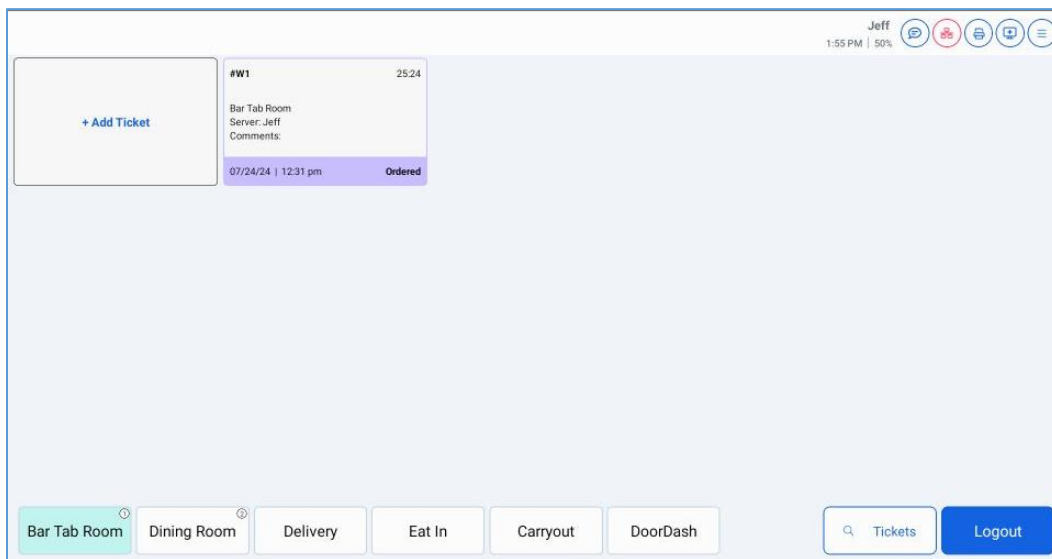
The Restaurant app will then display the location's PIN screen.



- 7 Enter a valid PIN, then tap **Go**.

Setting a Printer Template for the Device

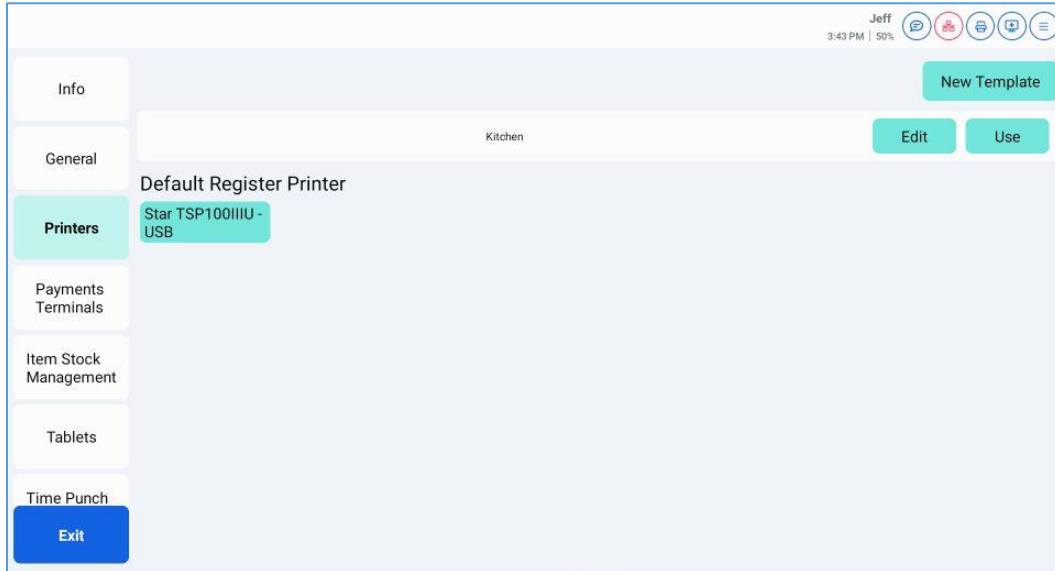
- 1 In the POS PIN screen, log into the POS.



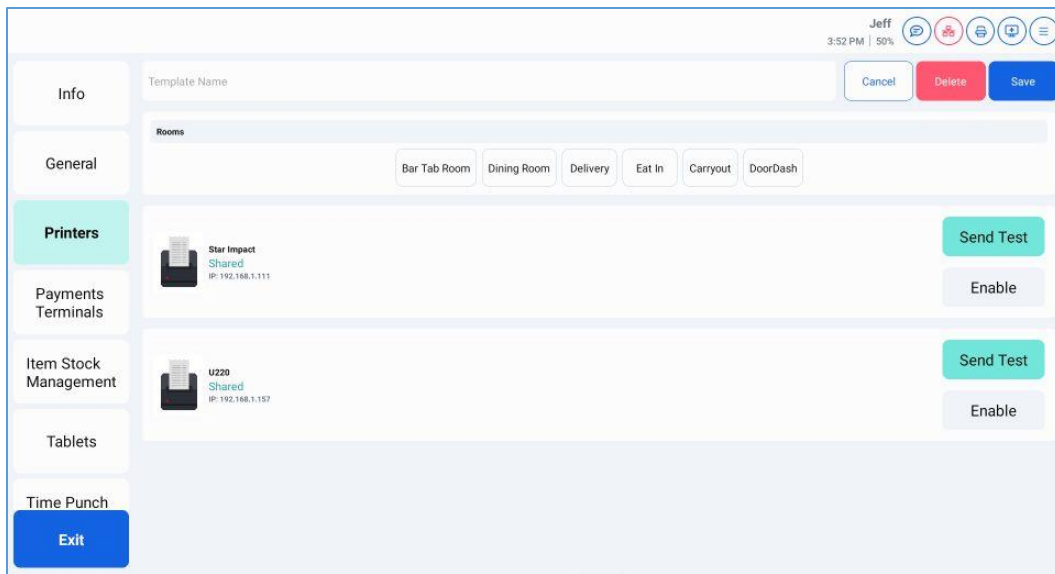
- 2 In the Rooms screen, tap the **Options** button.



- 3 In the **Options** menu, tap **Settings**, then tap **Printers**.

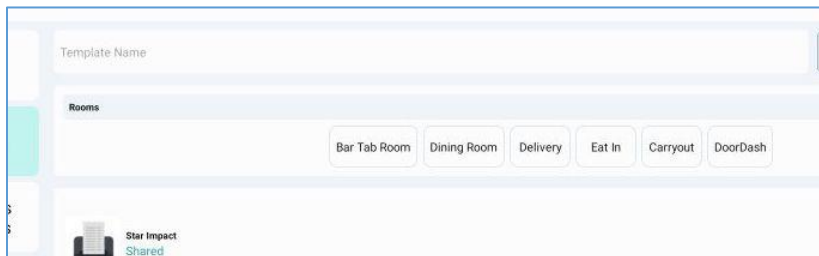


4 In the Printers screen, tap **New Template**.

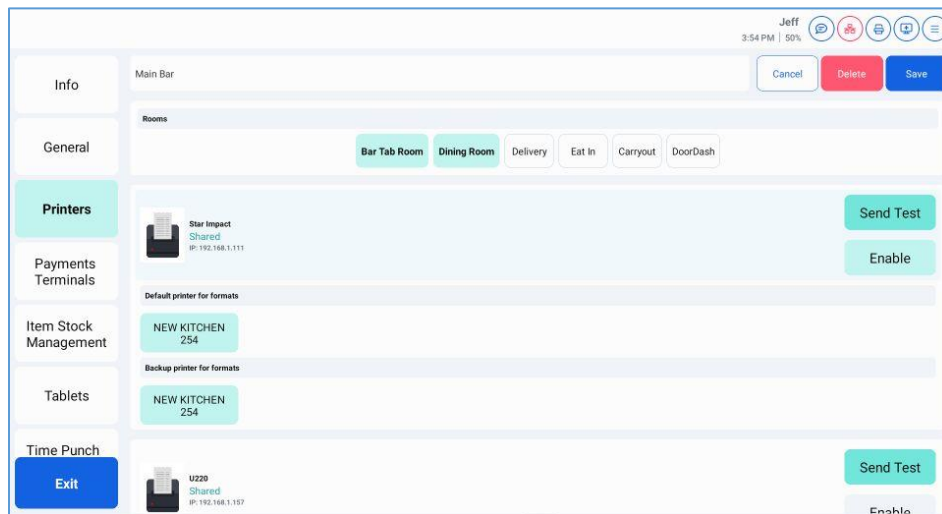


5 In the **Template Name** box, enter an appropriate name for the new printer template.

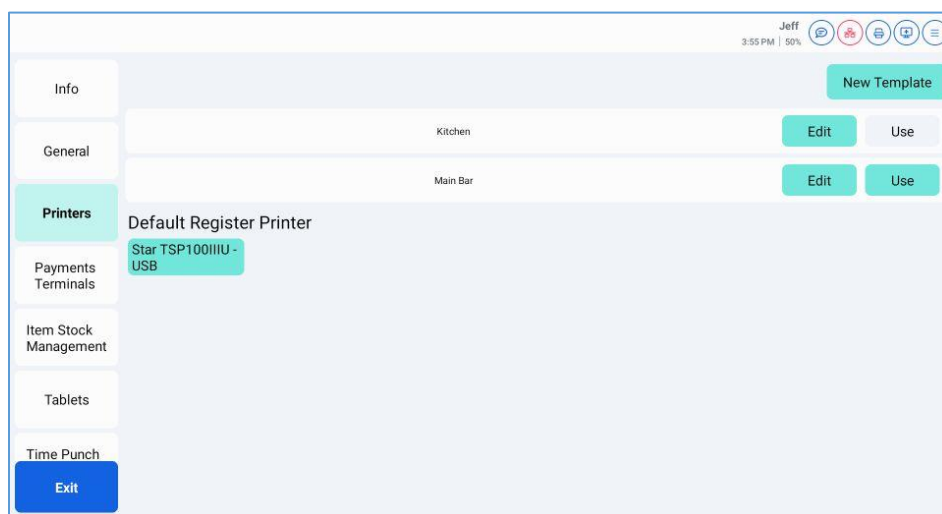
6 In the **Rooms** area, select each room that will use the printer on this device.



- 7 Scroll down and review the available printers.
- 8 For each printer that this device will use, tap **Enable** in the printer's tile.
- 9 For each kitchen printer you enable, in the **Default printer for formats** area, select the display formats that are applicable.
- 10 For each printer you enable, in the **Backup printer for formats** area, select the display formats that will use this printer as their backup when their default printer ever fails or loses its connection.



- 11 To send a test print job to an enabled printer, tap **Send Test** in the printer's tile.
- 12 Tap **Save** to save the template.
- 13 After saving the template, select an appropriate printer's tile for the template, then tap **Use**.



- 14 Tap **Exit** to return to the Ticket screen.

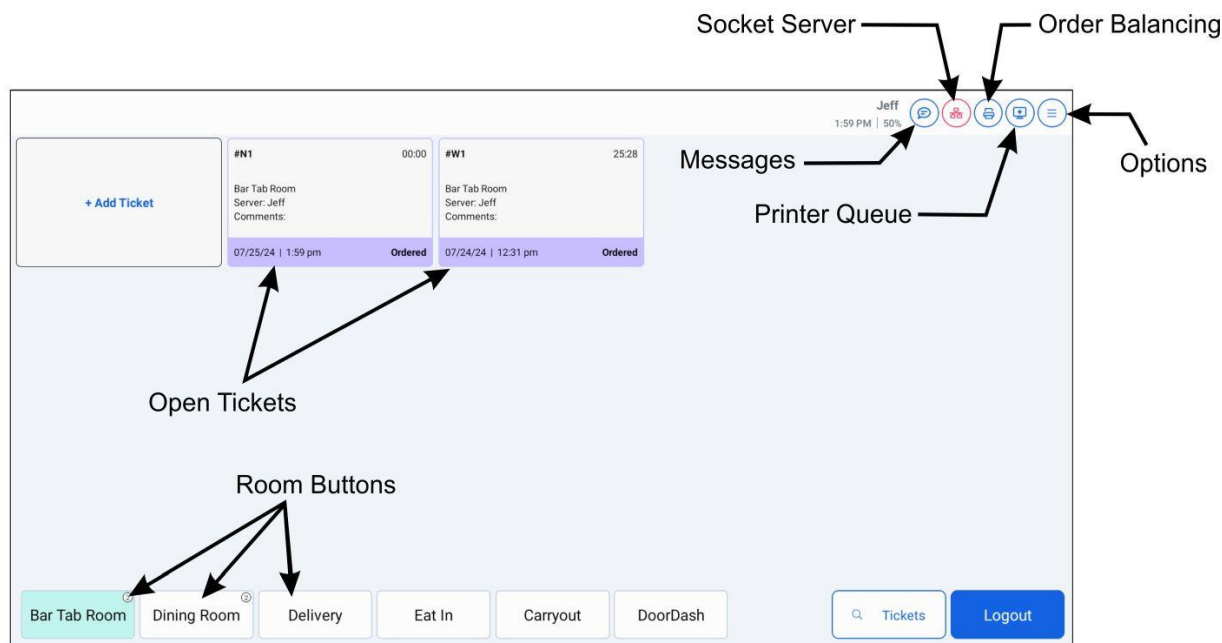
Using the POS (Basic Tasks)

The following sections describe the environment and features within the NextGen POS, as well as how to perform basic tasks and transactions, such as opening new tickets, ordering items, splitting tickets, and other actions.

Room Screen: Bar Service

When you log into the POS, it displays the Room screen. In this screen, you can select a room and then access, review, or add tickets in that room. When you first log in, the POS accesses the first room in the **Rooms** list by default and displays it and its tickets (if any are currently open).

Regardless of the type of room you are viewing, the Room screen always includes the following controls.



Messages: Accesses the **Messages** panel, which lists any messages you have received.

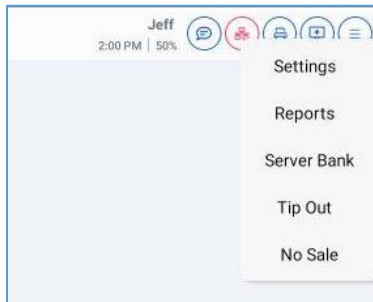
Socket Server: This icon displays the current connection status of the POS with the socket server.

Printer Queue: This button displays a panel that describes the printer's current status in detail.

Order Balancing: If the location uses Online Ordering, this button opens the **Online Ordering** panel, which includes a switch for enabling the Order Balancing feature.



Options: If you tap this button, the POS displays the [Options menu](#), which provides access to [Manager Settings menu](#), [Reports](#), [Server Bank](#), [Tip Out](#), and [No Sale](#) screens.



Regardless of the type of room you are viewing, the POS will always display the ticket tiles in the Room screen as highlighted by a color that indicates its current status:

No Items	Yellow
Ordered	Purple
Closed	Teal
Cancelled	Red
Refunded	Orange
Partially Paid	Light Green
Paid in Full	Light Blue
Offline	Dark Purple
Held	Orange
Future	Light Cyan

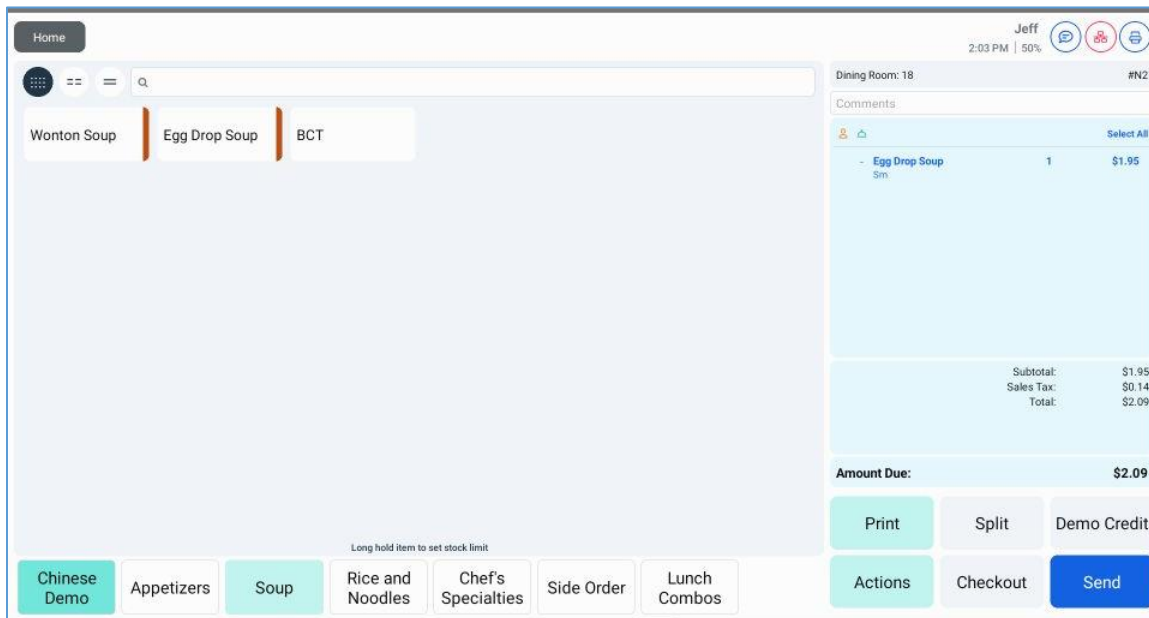
When you log in, the Room screen displays the first room in the **Rooms** list by default, including all open tickets currently in that room. To access a different room, tap its button in the bottom panel.

Room Screen: Table Service

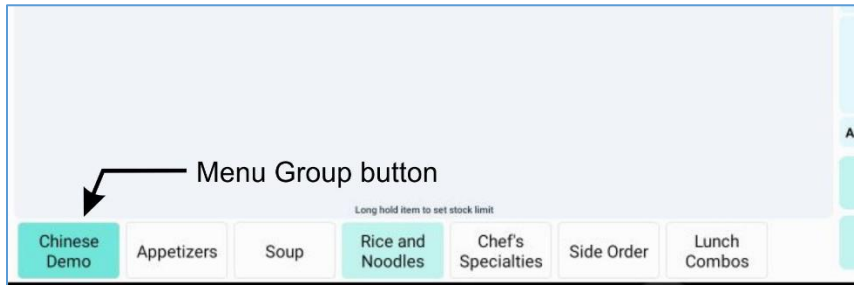
If you access a room that uses table layouts, the POS displays the room's table layout, with icons representing its available tables. In this view, tables with open tickets display as highlighted.



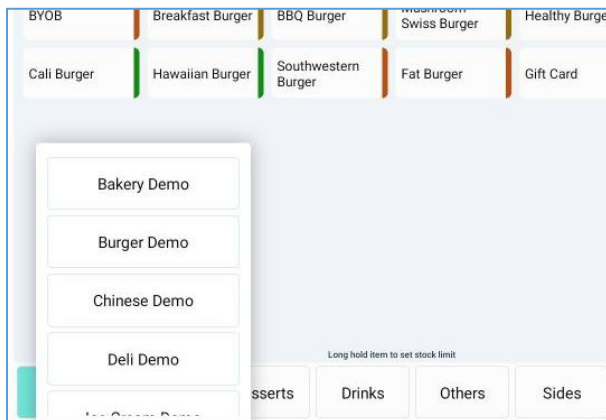
To open a ticket, tap the icon of an unoccupied table. The POS displays the Order screen, which you can use to add items to the ticket. This screen enables you to navigate and find items in different menu groups and sections.



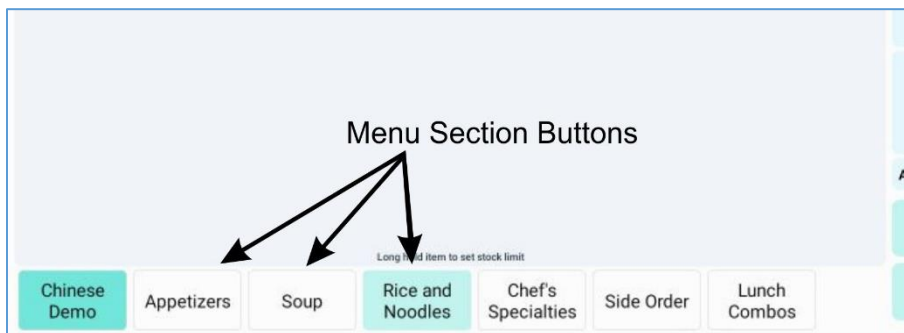
In the Order screen, you can access the items in a specific menu group by selecting that group in the **Menu Group** list, which you can access by tapping the **Menu Group** button (the left-most button in the bottom panel). The **Menu Group** button displays the name of the menu group currently selected as its label. In this example, the **Menu Group** button displays as **Chinese Demo** because it is currently accessing the “Chinese Demo” menu group.



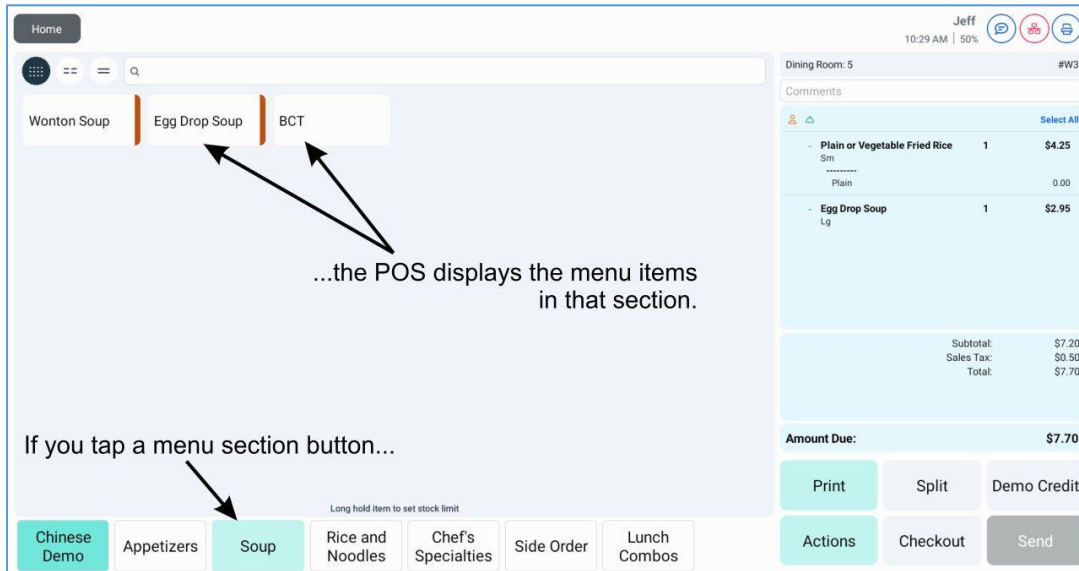
To select a different menu group, press the **Menu Group** button. The POS will display the **Menu Group** list.



If you tap a menu group in this list, the POS will then display buttons in the bottom panel, each representing a menu section associated with that menu group.

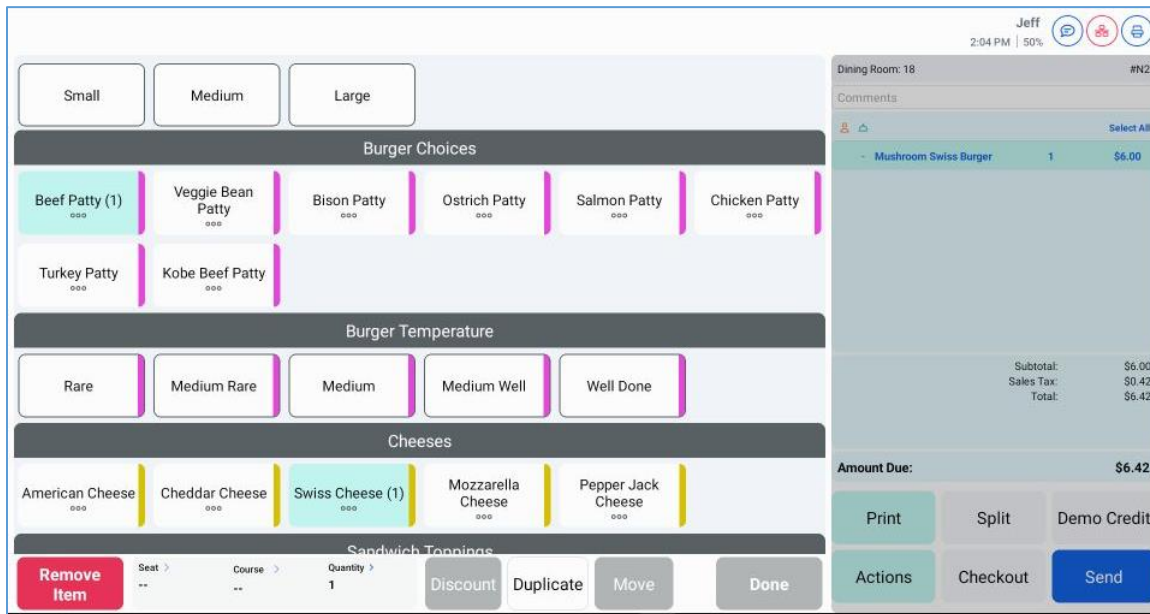


If you tap a menu section button, the POS displays the menu items associated with that section.

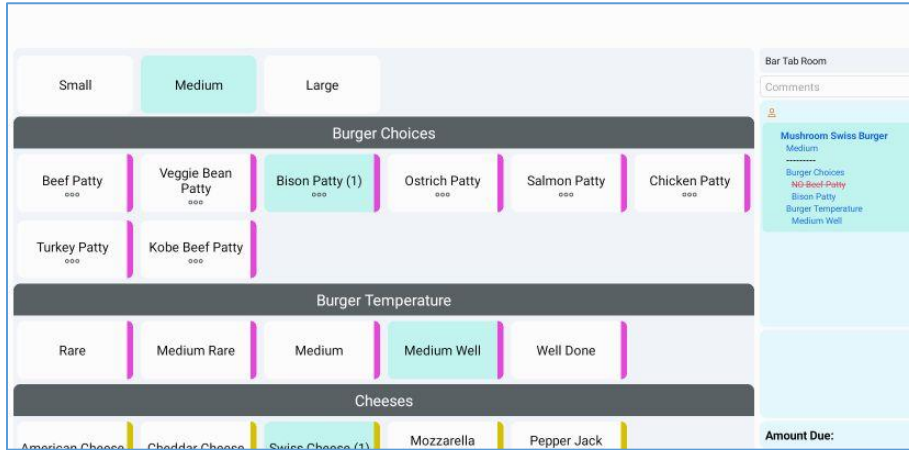


Ordering Menu Items in the Ticket Screen

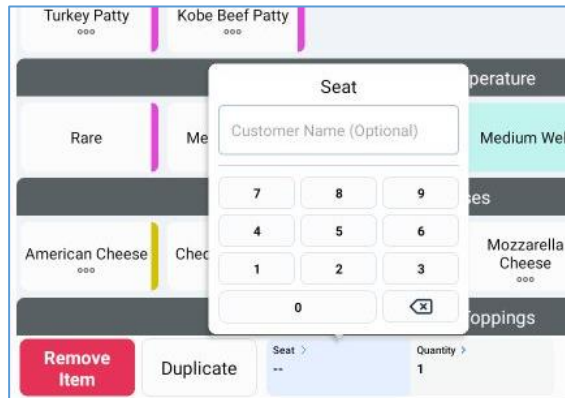
To add an item to a ticket, tap the item. If the item has no modifiers, the POS adds it to the ticket immediately. If the item does have modifiers, the POS displays its modifier options.



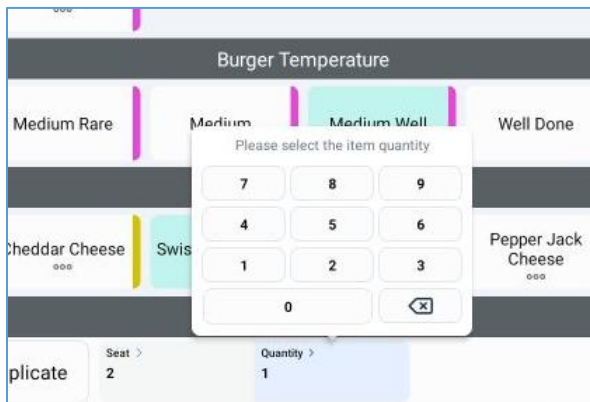
When you select a modifier, the POS highlights its selected button. As you select modifiers, the POS adds them to the ticket, displaying them in the Ticket panel on the right-hand side of the screen.



In the bottom panel, if you tap **Seat**, the POS displays a keypad, enabling you to enter a seat number for the item. If necessary, you can also enter a name for the customer in this seat by typing a name in the **Customer Name** box.



Also in the bottom panel, if you tap **Quantity**, the POS displays a keypad, enabling you to enter a new quantity for the item.

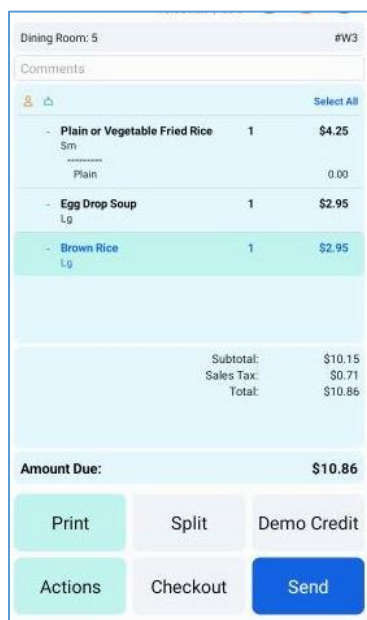


When you add the item to the ticket, the seat number and quantity will display with the item.

After you select all appropriate modifiers, tap **Done** to return to the Order screen. To remove the item from the ticket and return the Order screen, tap **Remove Item**.

Ticket Panel

In the Order screen, as you add or adjust the items on the ticket, the POS displays the ticket in a panel on the right-hand side of the screen, allowing you to review the full ticket at any time.



In this panel, the POS displays the ticket in detail, including its subtotal, sales tax, total, and current amount due. It also displays items that have been ordered but not yet sent to the kitchen printers in blue text. Items that have been sent to the printers display in black text.

Send

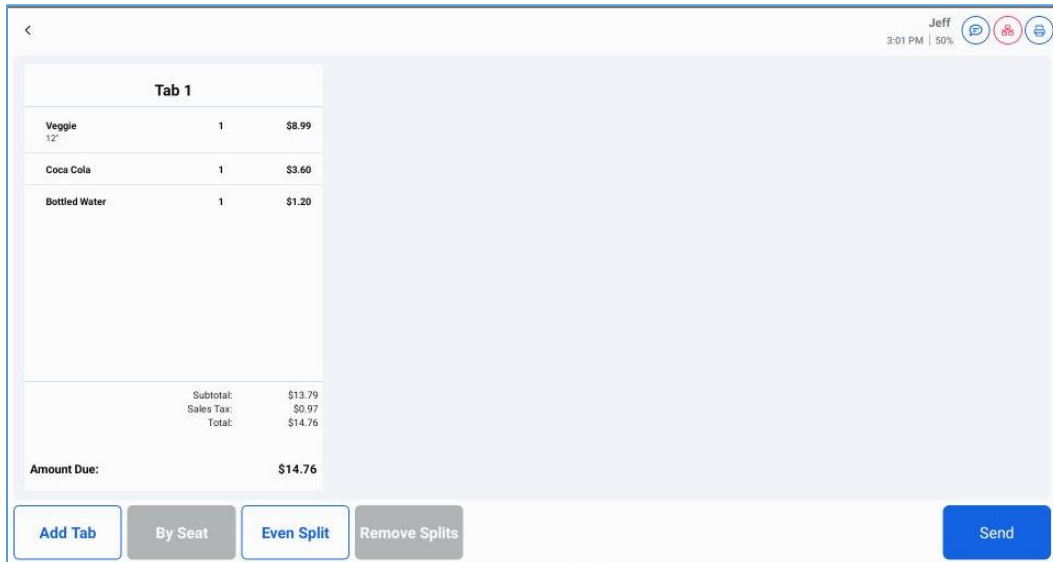
In this panel, if you tap **Send**, the POS will send all newly ordered items to the kitchen printers. In the Ticket screen, items that have been ordered but not sent to the prep printers display in blue text. After an item is sent to the printers, it displays in black text.

Print

If you tap **Print**, the POS will print the ticket on the receipt printer.

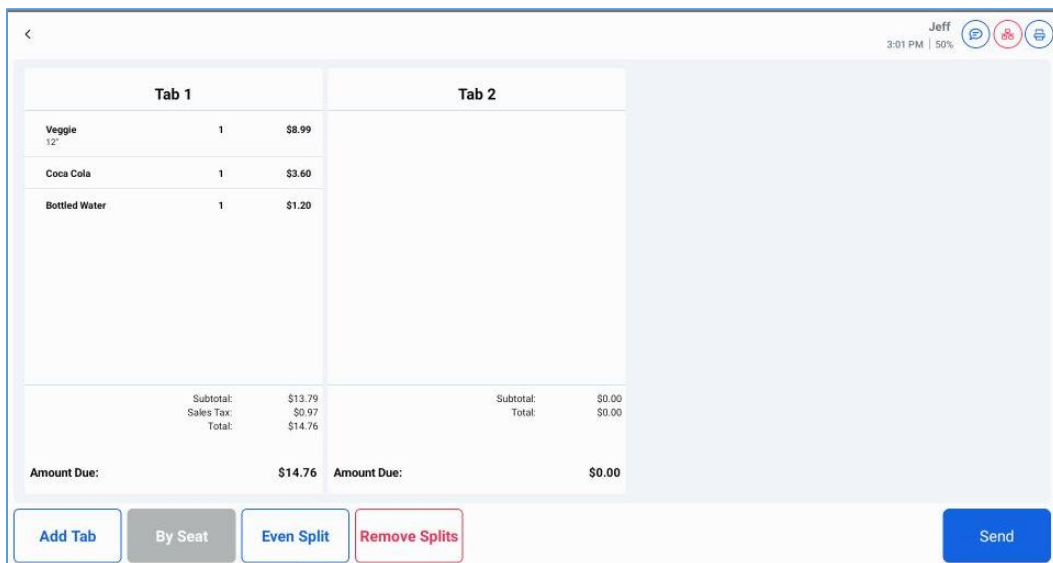
Split

If you tap **Split**, the POS will display the Split Ticket screen, which allows you to split the ticket in various ways. The options available are **Add Tab**, **By Seat**, or **Even Split**.

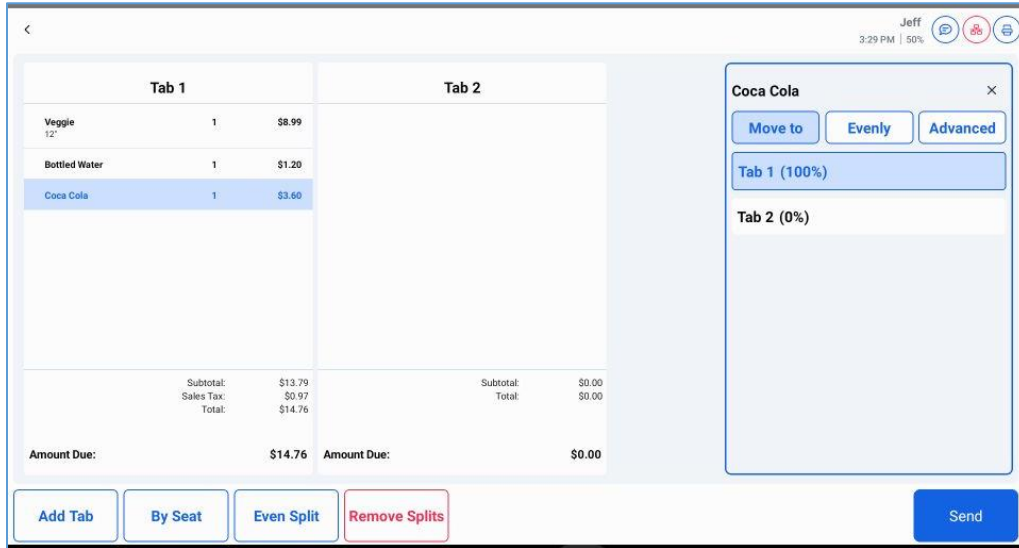


Add Tab

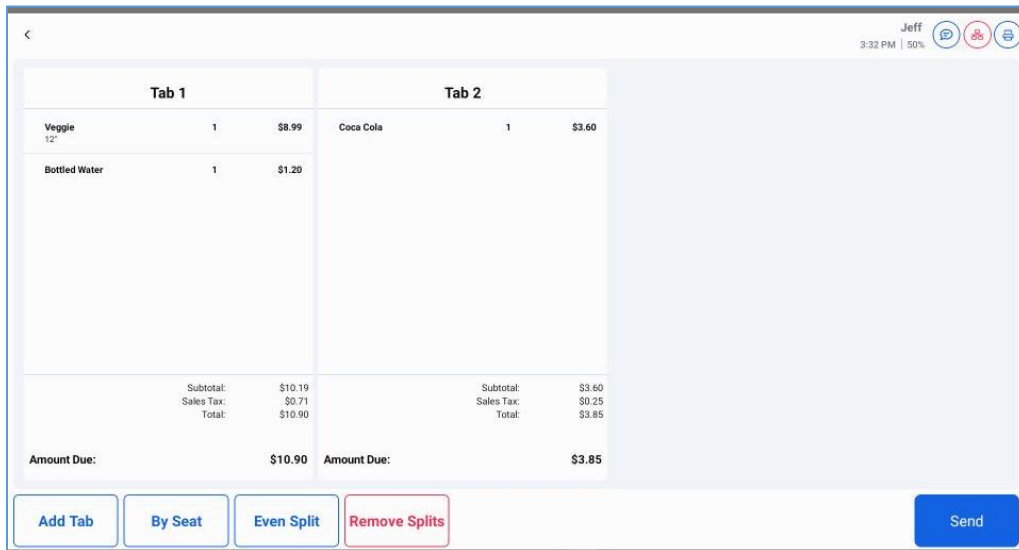
In the Split Order screen, if you tap **Add Tab**, the POS opens and displays a new empty tab in the ticket. You can add as many tabs as needed.



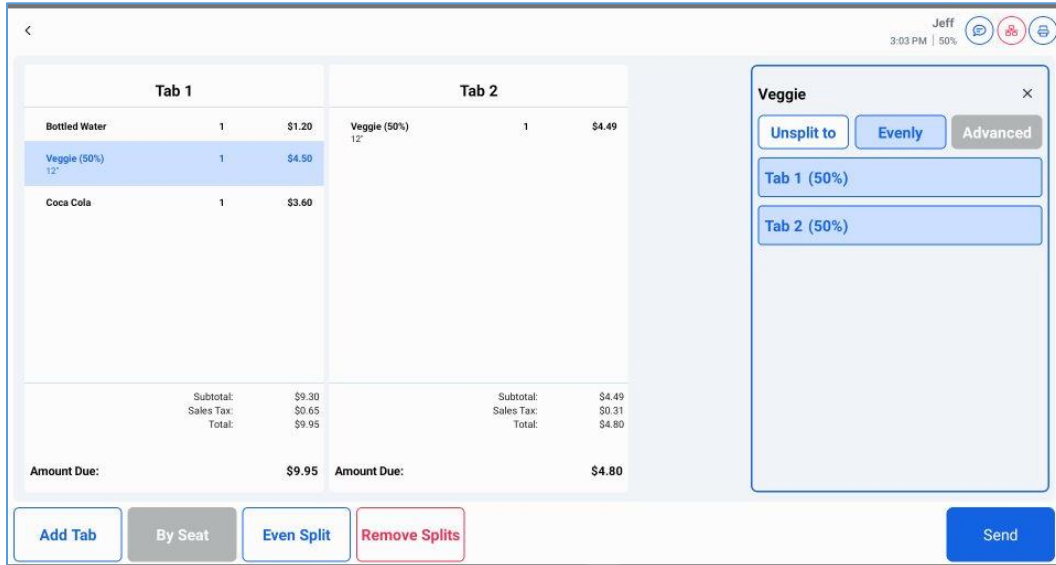
After adding a new tab, you can then move items from one tab to another. If you tap an item, the POS displays a panel with multiple split options: **Move to**, **Evenly**, and **Advanced**. The POS also displays a list of buttons, each representing a tab (**Tab 1**, **Tab 2**, and so on), with the item's current tab highlighted.



The **Move to** option enables you to move a whole item to a new tab. If you select **Move to** and then tap a tab button, the POS moves the item to the selected tab and displays the updated Ticket screen.

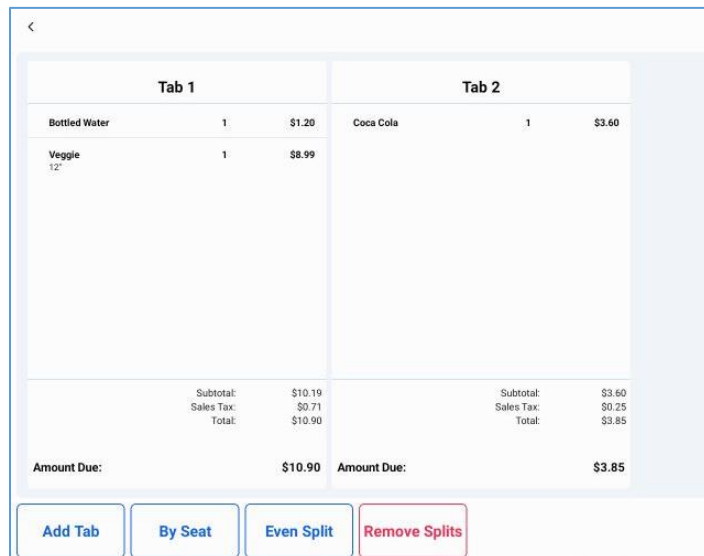
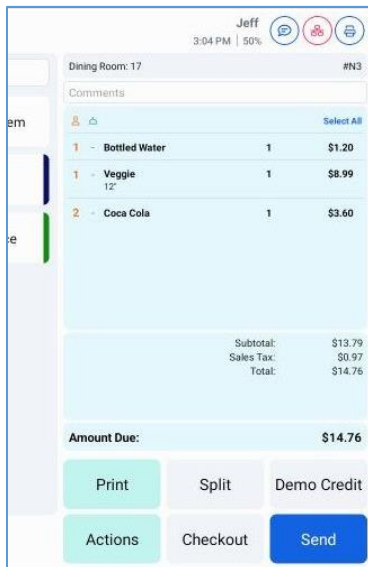


Instead of **Move to**, if you select **Evenly** and then select one or more tabs in the list, the POS splits the item (and its price) evenly between the selected tabs.



By Seat

In the Split Order screen, if you tap **By Seat**, the POS creates a dedicated tab for each seat number on the ticket, and then moves all items to the tabs that correspond with their seat numbers.



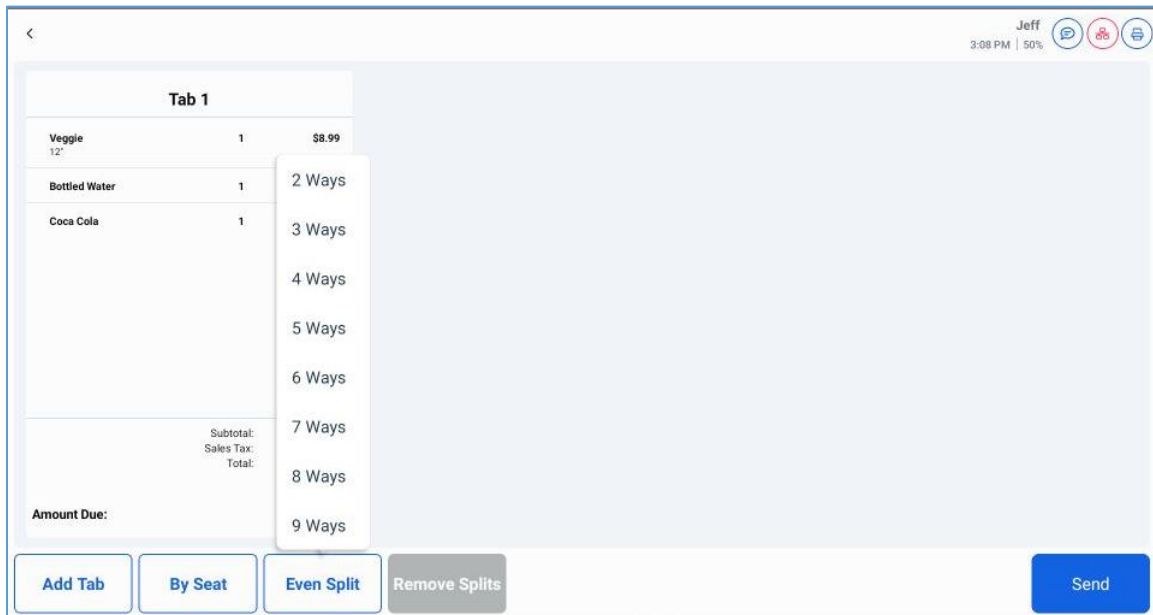
After you tap Send, the POS will display the Ticket screen, and the ticket panel now displays controls for accessing its separate tabs.



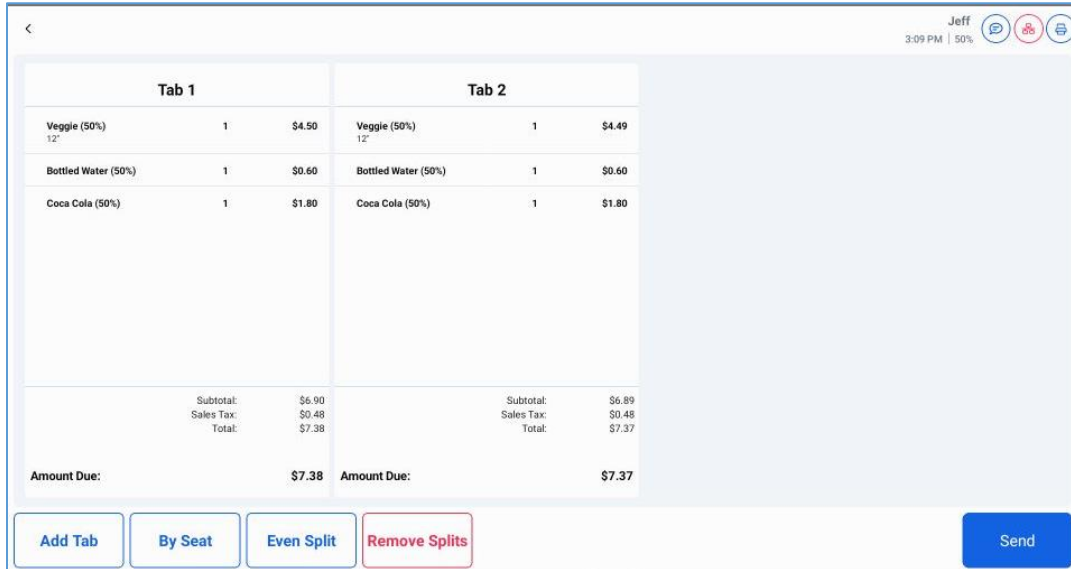
This split method only works if you assign seat numbers to the items in the ticket beforehand.

Even Split

In the Split Order screen, if you tap **Even Split**, the POS displays a list of split numbers, each representing the number of splits you want to create within the ticket (**2 Ways, 3 Ways, 4 Ways**, and so on).



After selecting a split number, the POS adds new tabs equal to the number you selected, then splits every item in the ticket evenly between all tabs.



For instance, you may want to split a ticket between two customers. Using the Split action, if you select **Split Evenly**, then select **2 Ways**, the POS would split the one existing tab into two tabs, then split every item on the ticket between the two tabs.

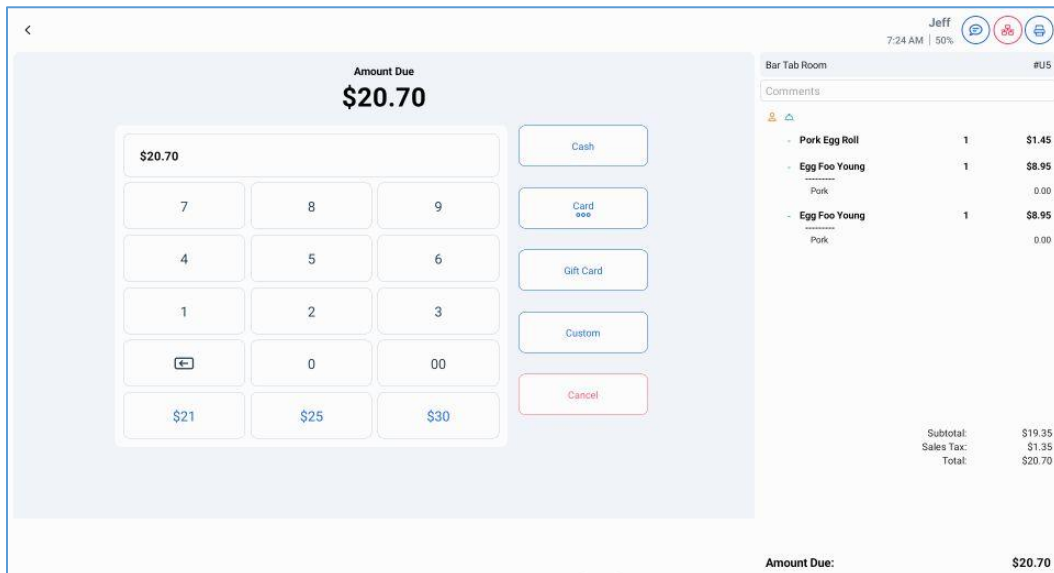
Removing a Split

If, for whatever reason, you need to remove a split (of any kind) from a ticket, you may do so by accessing the ticket, tapping **Action**, then tapping **Split** again. In the Split Ticket screen, tap **Remove Splits**. The POS will remove all splits from the ticket and display the Ticket screen.

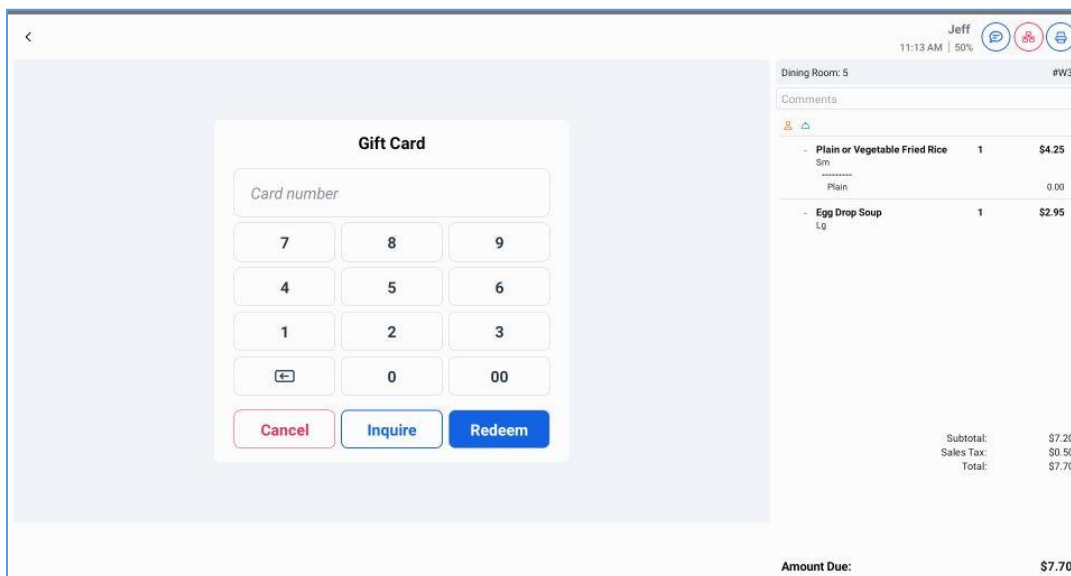


Checkout

If you tap **Checkout**, the POS will access the Payment screen. In this screen, you can select appropriate payment option to pay the check.



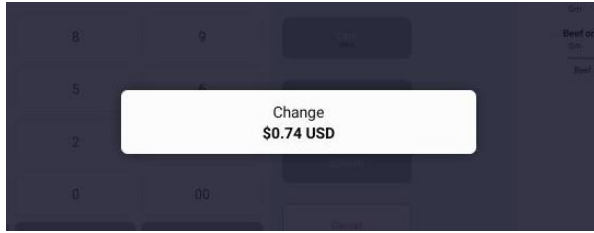
If the customer pays with a credit card, tap **Card**. If the customer pays with a gift card, tap **Gift Card**.



To pay the ticket with a custom tender, tap **Custom**.

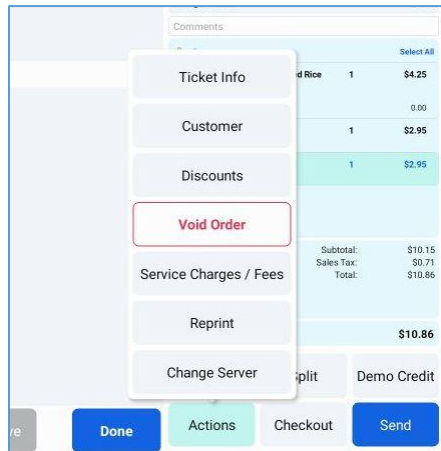
If the customer pays with cash and gives the exact amount of the ticket, tap **Cash**. The POS will automatically pay the ticket with cash for its total amount.

If the customer pays with cash and gives an amount greater than the ticket's total, enter the tendered cash amount with the keypad, or tap one of the suggested tender amounts. The POS will pay the ticket with cash and then display the total change due.



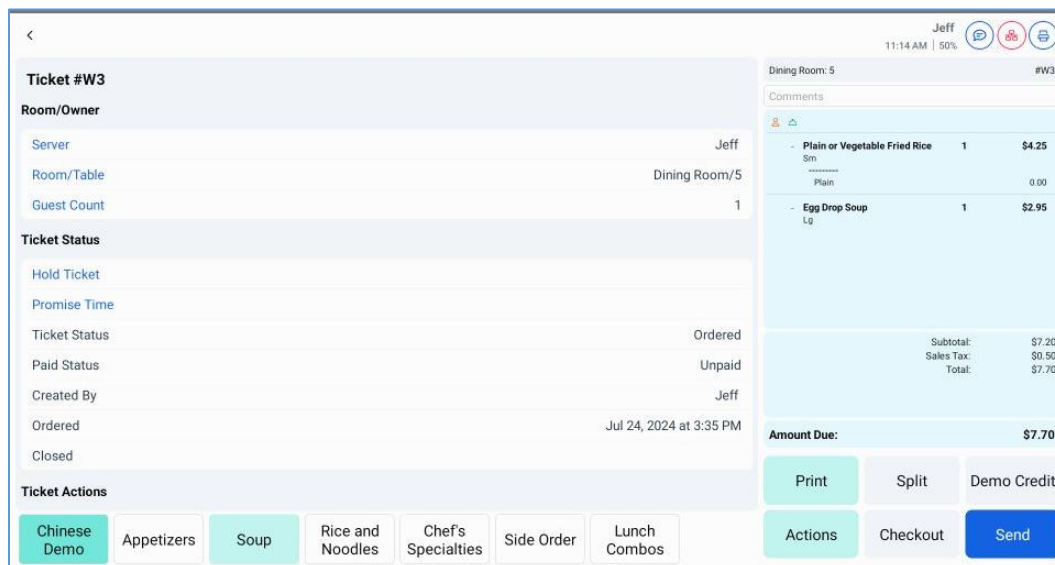
Actions

If you tap **Actions**, the POS will display a submenu with more options.



Ticket Info

In the **Actions** submenu, if you tap **Ticket Info**, the POS displays the Ticket Info screen, which features a list of information about the ticket, such as its server, its room and table number, its hold status, its payment, and so on.



Customer

If you tap **Customer**, the POS opens the Customer Info screen. In this screen, you can enter, review, or revise a customer's basic contact information, such as name, address, telephone numbers, and email address.

Ticket #W3 - Enter Ticket Details

Phone: 2587456 Guest#: T4

Company: Guest Name: David

Email: Credit Card Name:

Address:

Suite: City: State: Zip Code:

Delivery Instructions:

Alternate ID or Card Number:

Menu Items:

- Plain or Vegetable Fried Rice 1 \$4.25
 - Sm: 0.00
 - Plain: 0.00
- Egg Drop Soup 1 \$2.95
 - Lg: 0.00

Subtotal: \$7.20
Sales Tax: \$0.50
Total: \$7.70

Amount Due: \$7.70

Buttons: Print, Split, Demo Credit, Actions, Checkout, Send

Bottom Bar: Chinese Demo, Appetizers, Soup, Rice and Noodles, Chef's Specialties, Side Order, Lunch Combos

Discounts

In the **Actions** submenu, if you tap **Discounts**, the POS will display the Discounts & Promotions screen, which lists all discounts and promotions that can be applied to the ticket.

Discounts & Promotions
This discount will apply to the entire ticket.

Search Discounts or Promos

No Tax	\$1 Coupon	100	50% Off	Employee Discount
Employee Discount	Employee Meal	Employee Meal 50%	Firefighters Discount	Hero Discount
Local Business	Military Discount	Open Amount \$	Open Amount %	Owners Comp
Paramedics Discount	Police Discount	Police/Fire Discount	Senior Discount	Service Discount
Teamsters				

Menu Items:

- Plain or Vegetable Fried Rice 1 \$4.25
 - Sm: 0.00
 - Plain: 0.00
- Egg Drop Soup 1 \$2.95
 - Lg: 0.00
- Open Amount % -\$1.44

Subtotal: \$5.76
Sales Tax: \$0.40
Total: \$6.16

Amount Due: \$6.16

Buttons: Print, Split, Demo Credit, Actions, Checkout, Send

Bottom Bar: Chinese Demo, Appetizers, Soup, Rice and Noodles, Chef's Specialties, Side Order, Lunch Combos

If you tap a discount option in the screen, the POS will add that discount to the ticket. If you tap a discount option with an open amount, the POS will display a keypad, enabling you to enter an amount for the discount. Tap **Apply** to add the discount to the ticket.

Discounts & Promotions

-\$0.00

Can't add zero adjustment

7	8	9
4	5	6
1	2	3
⌫	0	00

Cancel Apply

After you tap **Apply**, the POS displays the discount as a new item in the ticket display and adjusts the ticket's totals appropriately.

Dining Room

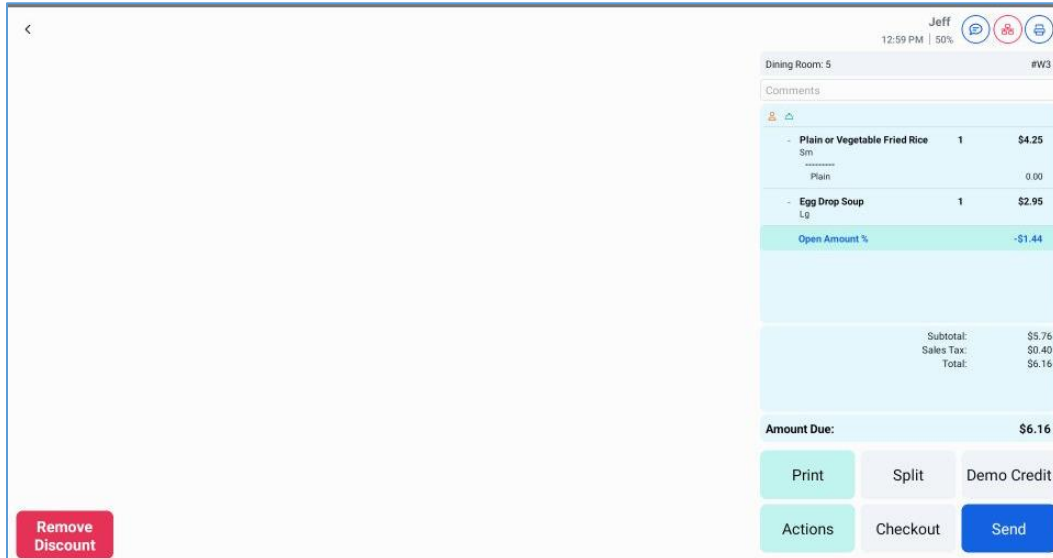
Comments

- Plain or Vegetable Fried Rice	1	\$4.25
Sm		
Plain		0.00
- Egg Drop Soup	1	\$2.95
Lg		
Open Amount %		-\$1.44

Subtotal: \$5.76
Sales Tax: \$0.40
Total: \$6.16

Amount Due: \$6.16

If you need to remove the discount from the ticket, tap the discount in the ticket panel, then tap **Remove Discount**.



Void Order

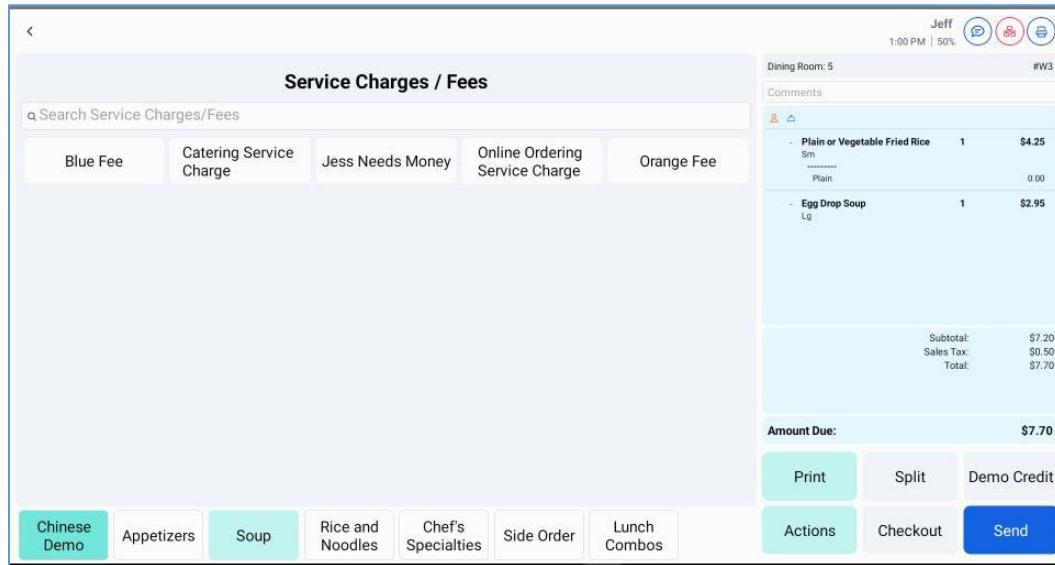
In the **Actions** submenu, if you tap **Void Order**, the POS will display the Reason for Void panel, which lists all predefined void reasons that can be applied to the ticket. You can also add a description of the void reason by entering the details in the **Description** box.



To void the whole ticket, tap an appropriate void reason, then tap **Void**. The POS will void the ticket and display the room's ticket screen, with the ticket's table icon now displaying as available.

Service Charges/Fees

In the **Actions** submenu, if you tap **Service Charges/Fees**, the POS will display the Service Charges/Fees screen, which lists all charges that can be applied to the ticket.



If you tap a charge option in the screen, the POS will add that charge to the ticket. If you tap a charge option with an open amount, the POS will display a keypad, enabling you to enter an amount for the charge. Tap **Apply** to add the charge to the ticket.

After you tap **Apply**, the POS displays the charge as a new item in the ticket display and adjusts the ticket's totals appropriately.

Comments		
- Plain or Vegetable Fried Rice	1	\$4.25
Sm		

Plain		0.00
- Egg Drop Soup	1	\$2.95
Lg		
Blue Fee		\$1.00
Subtotal:		\$8.20
Sales Tax:		\$0.57
Total:		\$8.77
Amount Due:		\$8.77

Print Split Demo Credit

If you need to remove the discount from the ticket, tap the discount in the ticket panel, then tap **Remove Discount**.

Comments		
- Plain or Vegetable Fried Rice	1	\$4.25
Sm		

Plain		0.00
- Egg Drop Soup	1	\$2.95
Lg		
Open Amount %		-\$1.44
Subtotal:		\$5.76
Sales Tax:		\$0.40
Total:		\$6.16
Amount Due:		\$6.16

Print Split Demo Credit

Actions Checkout Send

Remove Discount

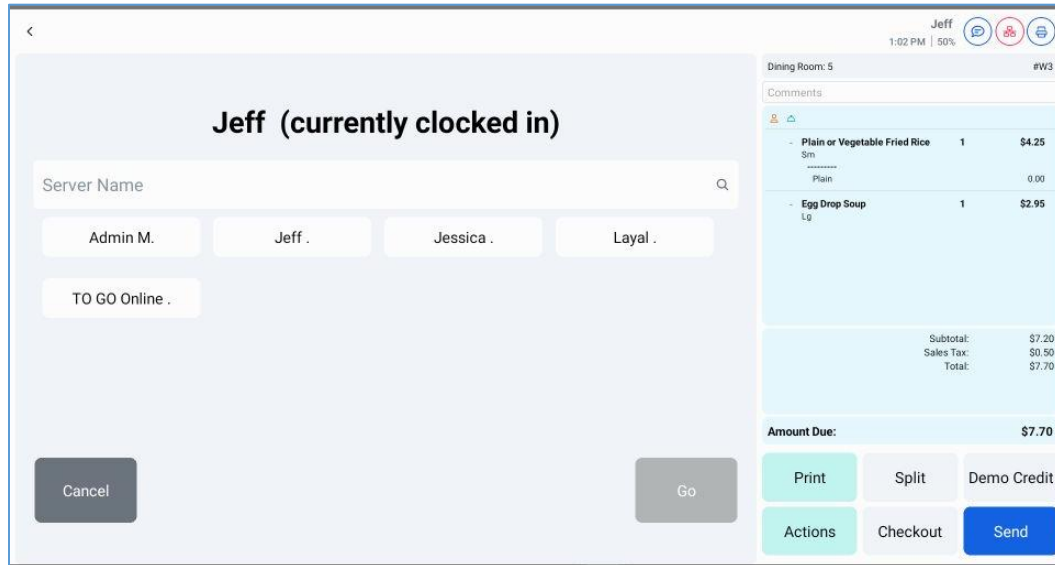
Reprint

The **Reprint** action enables you to reprint the ticket. In the **Actions** submenu, if you tap **Reprint**, the POS displays a screen listing buttons, each representing an available printer.

If you tap a printer button, the POS will send the ticket to the selected printer. If you press and hold a printer's button, the POS will display the **Preview** option. If you then tap **Preview**, the POS displays a print preview of the ticket.

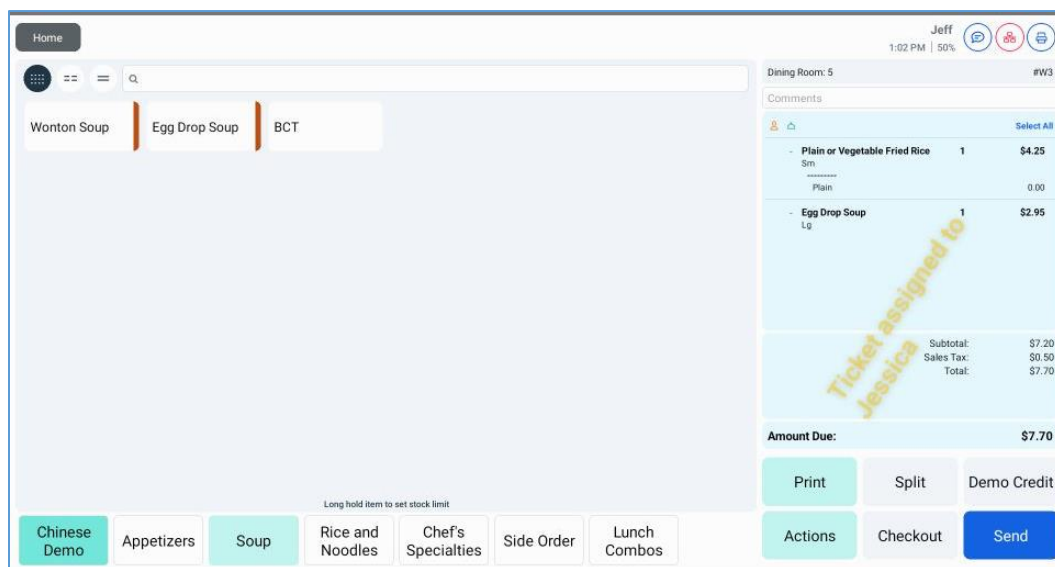
Change Server

The **Change Server** action accesses controls that enable you to assign the ticket to a different server. In the Actions submenu, if you tap **Change Server**, the POS displays the Change Server screen, featuring a list of buttons representing all servers that are currently clocked in.



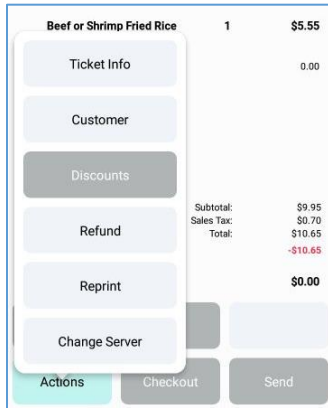
To assign the ticket to a new server, select an appropriate server's button, then tap **Go**. If you do not see a button representing the server you want to select, type the server's name in the **Server Name** box. If that server is clocked in, the POS will display the server as an option. Select the server, then tap **Go**.

Afterwards, when you access this ticket, the POS will display banner text across the screen declaring that that ticket is assigned to the new server.

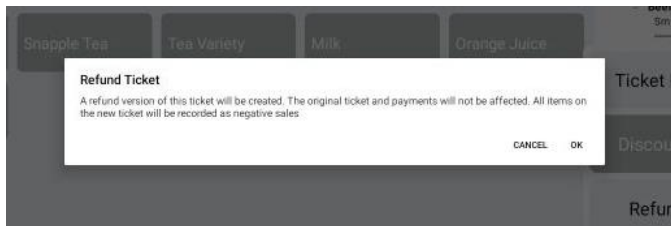


Refund

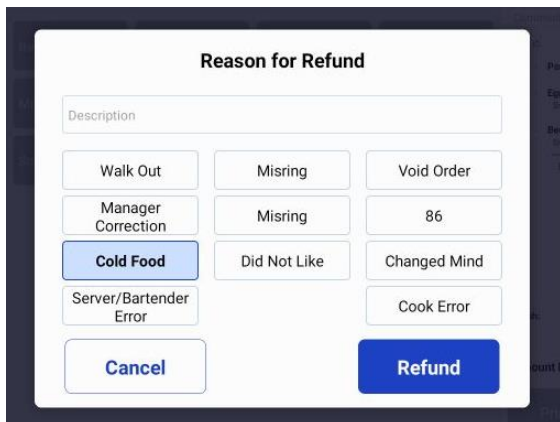
After you pay a ticket, the POS will include **Refund** as an action option. The Refund action enables you to refund the full amount of a ticket back to a customer, with various payment methods.



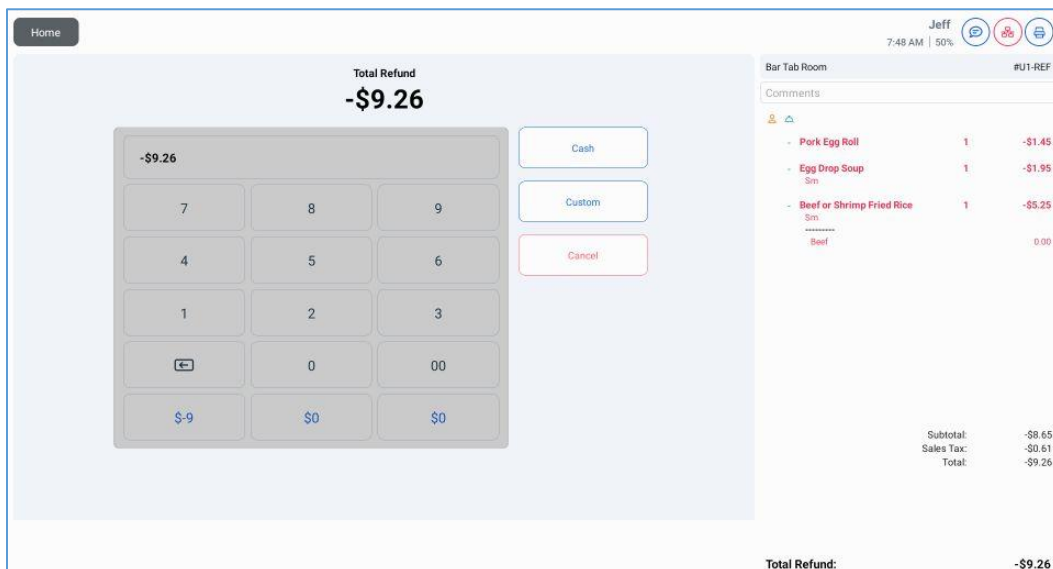
If you tap **Refund**, the POS displays a Refund Ticket prompt, describing how the POS will process the refund (by creating a refund version of the original ticket). Tap **OK** to continue.



The POS then displays the **Reason for Refund** panel, allowing you to specify the reason for the refund. In this panel, select an existing reason option (if any are applicable), or type a more detailed reason in the **Description** box, then tap **Refund**.

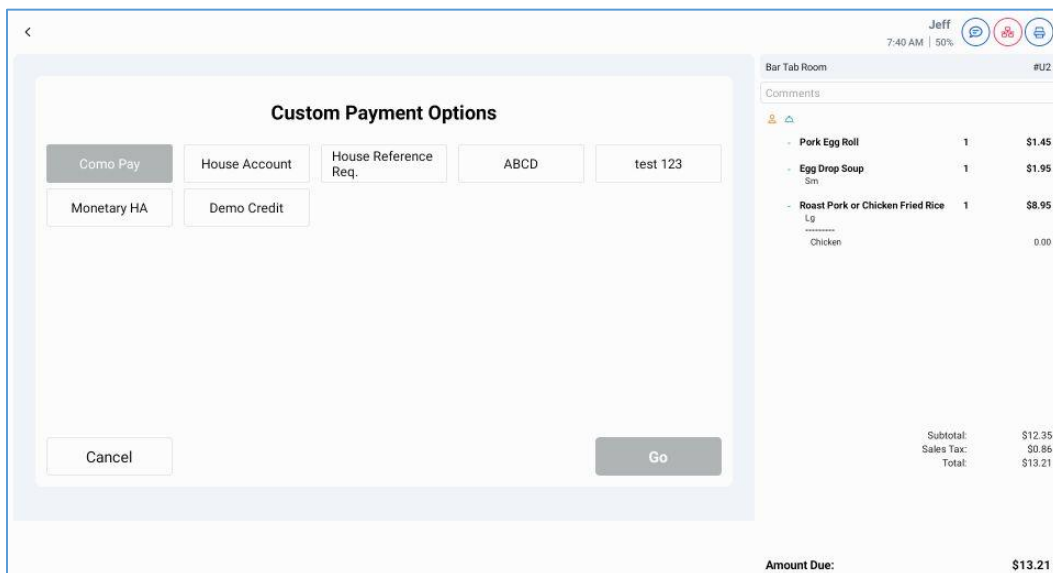


The POS will then display a screen displaying the total refund amount and a list of payment options. In this screen, you may select an appropriate payment type to use for the refund.



If necessary, you can edit the default amount of the refund by entering a new amount with the keypad. Once the appropriate amount is set, tap the button of an appropriate payment type, such as **Cash** (if enabled for the location), **Card**, or **Gift Card**, or **Custom**.

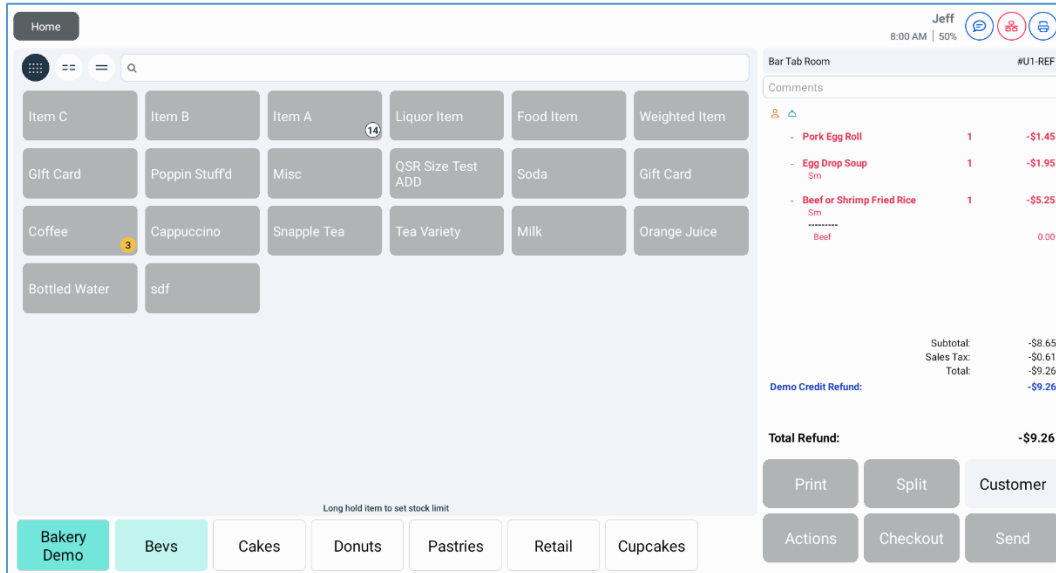
If you tap **Custom**, the POS will display a panel listing the location's custom tenders as payment options. If you tap **Cancel**, the POS will cancel the Refund transaction and return to the Ticket screen.



Once you select a payment type, the POS processes the refund with the selected payment type, then displays a screen verifying its approval.

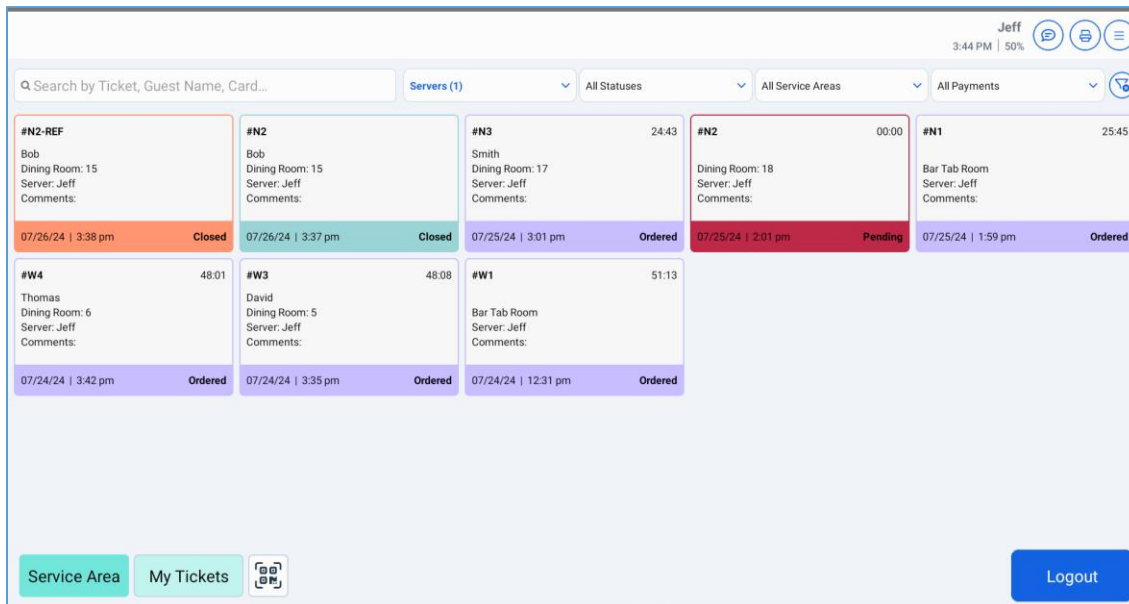
If the transaction requires a customer's signature, you can tap **Sign** to access the signature panel, allowing the customer to add a signature. If you tap **Print**, the POS will prompt you to either preview the ticket or send it to a receipt printer. If the refund's payment type supports the option, you can select **Void Payment** to void the payment.

If you access the ticket after performing a refund, the POS will display the ticket's items with red text. In the Room screen, the POS will also display the ticket's tile highlighted in red.



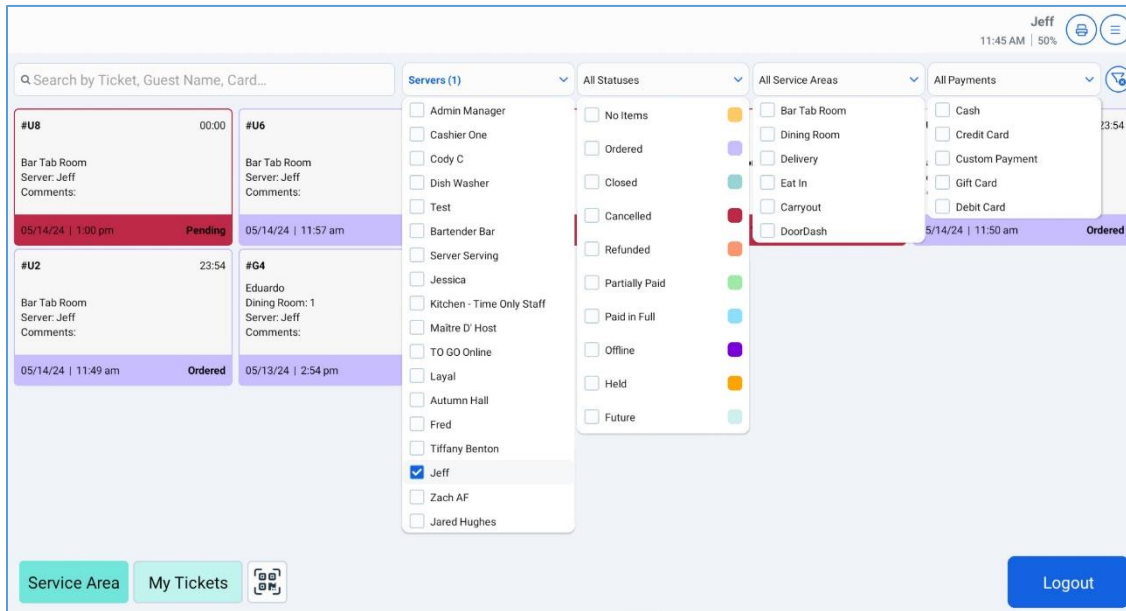
Ticket Search

In the Room screen, if you tap **Tickets**, the POS will access the Ticket Search screen, which features various controls to enable you to search for a ticket, regardless of its status. This screen lists all tickets as selectable tiles, each displaying the ticket's number, room, server, comments (if any), and the ticket's status.



In the bottom panel, if you tap **Service Area**, the POS filters the list to only display tickets associated with the room. If you tap **My Tickets**, the POS filters the list to only display tickets associated with the server currently accessing the screen.

The top panel features controls that enable you to filter the list of tickets by one or more servers, ticket statuses, service areas, or payment types.




To search for a specific ticket, enter a ticket number, customer name, or card number in the **Search** box.

To apply a filter to the ticket list, tap one of the search lists (**Servers**, **Statuses**, **Service Areas**, or **Payments**) and select the desired criteria. To clear all current filters, tap the **Clear Filters** button.



Options Menu

The **Options** menu provides access to various features for staff members, such as checking out server banks or performing tip outs. To access the Options menu, tap  in the Rooms screen.

The **Options** menu provides access to the following screens and functions:

- ▶ [Manager Settings Menu](#)
- ▶ [Reports](#)
- ▶ [Server Bank](#)
- ▶ [Tip Out](#)

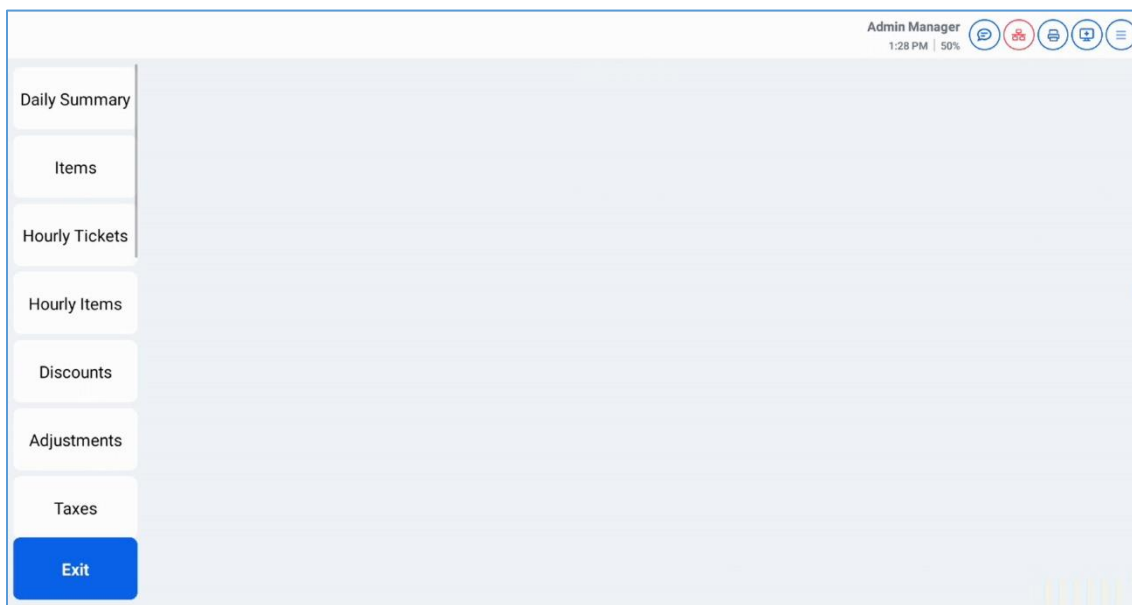
- ▶ [No Sale](#)
- ▶ System Logout

Settings

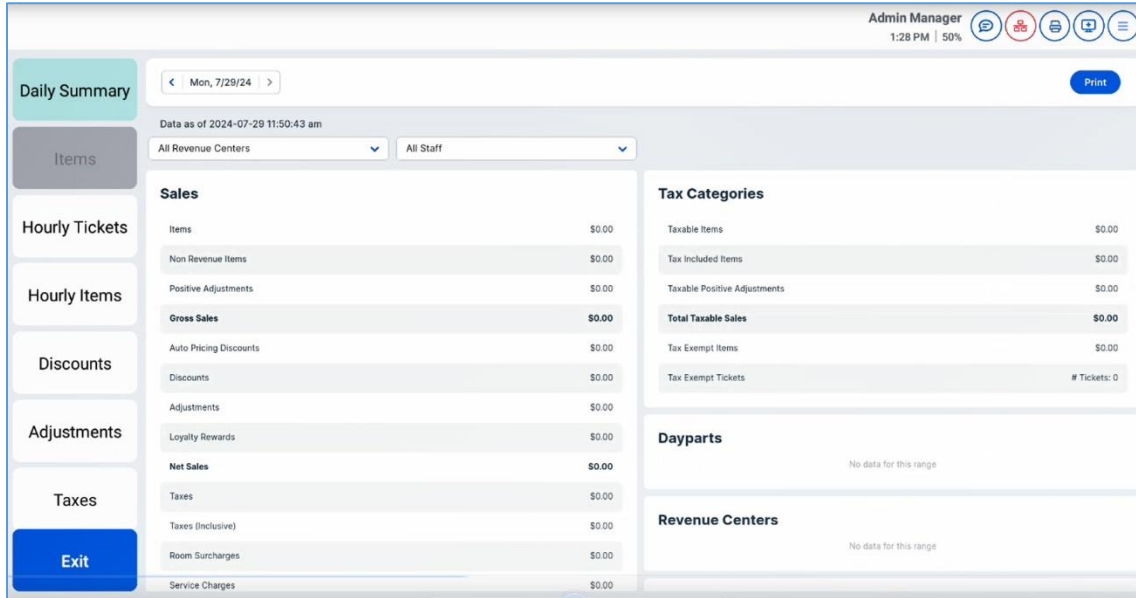
The **Settings** option access the [Manager Settings menu](#).

Reports

The **Reports** option accesses the Reports screen, which provides access to numerous reports on the status of various aspects of the business during the day. In the POS Room screen, tap the **Options** button, then tap **Reports**. The POS displays the Reports screen, which features a **Reports** menu along its left side.



Each button in the **Reports** menu access a specific report. For instance, if you tap the **Daily Summary**, the POS will display the Daily Summary Report.

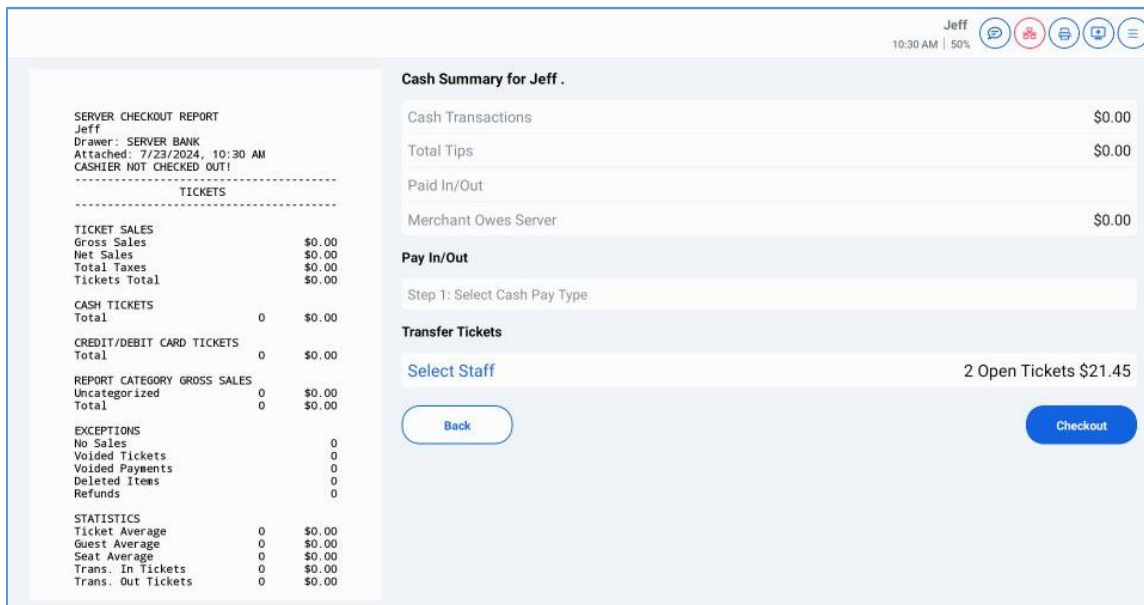


To return to the POS Rooms screen, tap **Exit**.

Server Bank

The **Server Bank** option accesses the Server Bank screen, which enables staff members to check out server banks. The POS will not allow you to check out a server bank until all of its tickets are closed by their associated servers. To complete a server checkout, each server should reconcile and close their tickets in the Server Bank screen.

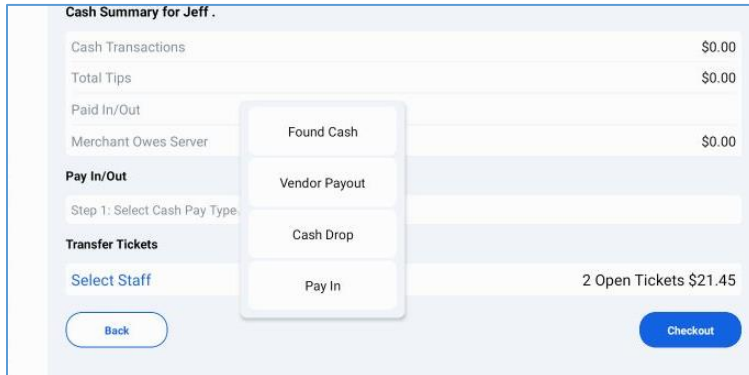
In the POS Room screen, tap the **Options** button, then tap **Server Bank**. The POS displays the Server Bank screen.



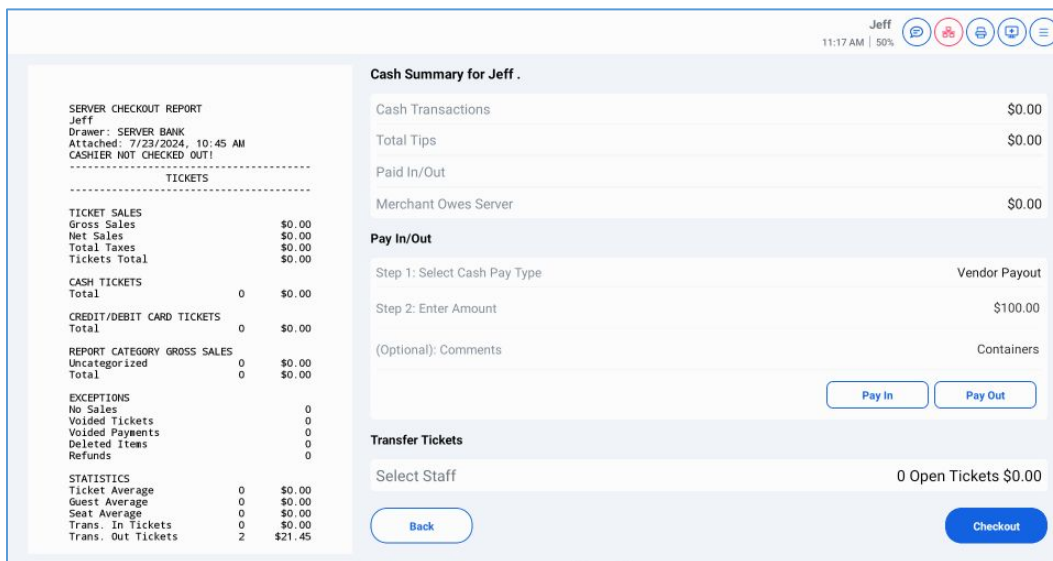
Within this screen, the POS displays the Server Checkout Report in the left-hand panel.

The **Cash Summary** section lists totals for cash transactions, tips, paid in/paid out transactions, and any funds the merchant may still owe the server.

The **Pay In/Out** section enables you to perform a pay in or pay out. In this section, if you tap **Step 1**, the POS prompts you to select cash pay type.

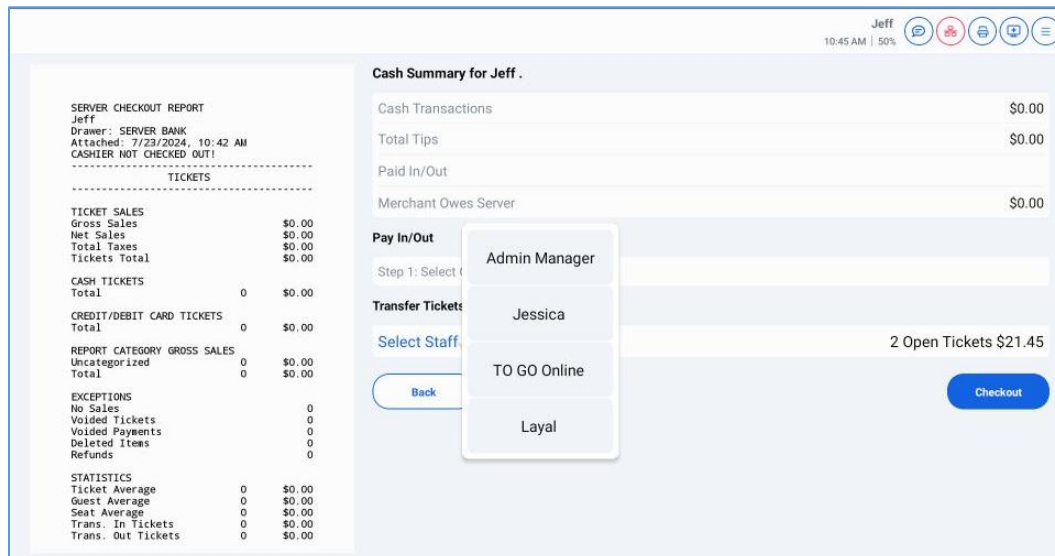


If you select a pay type, the POS then prompts you to enter the amount of the payment. If needed, you can also tap **Comments** and add any comments to the transaction.



After entering the necessary settings, if you want to perform a “pay in” transaction, tap **Pay In**. If you want to perform a “pay out” transaction, tap **Pay Out**.

In the **Transfer Tickets** section, the server can transfer any remaining open tickets to another staff member. If you tap **Select Staff**, the POS displays a panel listing available staff members.



If you tap a staff member's button, the POS will prompt you to verify the selection. At the prompt, if you tap **OK**, the POS will transfer all open tickets to that staff member.



Once all tickets are closed, the server can tap **Checkout**. The POS displays a prompt to verify the checkout.

After completing the checkout, the server should return any amount listed as **Server Owes Merchant** to the restaurant. Conversely, if the **Server Owes Merchant** amount is negative, the restaurant should return that amount back to the server.

Once a checkout is completed, the manager can review its details in the [Daily Review screen](#).

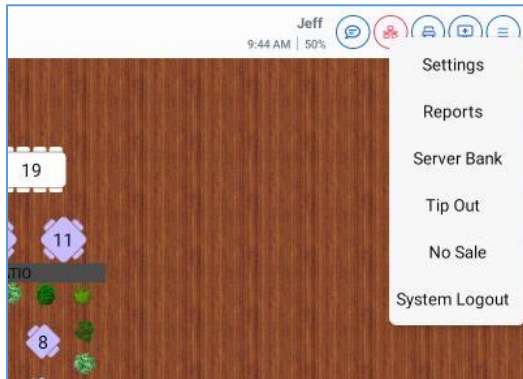
Tip Outs

The **Tip Out** option accesses the Tip Out screen, which enables you to allocate a percentage of a server's net sales, gross sales, and tips to another staff member or to a group "tip pool". Depending on how your site is configured, the POS might automatically allocate such funds into a tip pool that is available for redistribution in the POS. In other sites, staff may need to allocate their funds manually into a group pool or directly to another staff member.

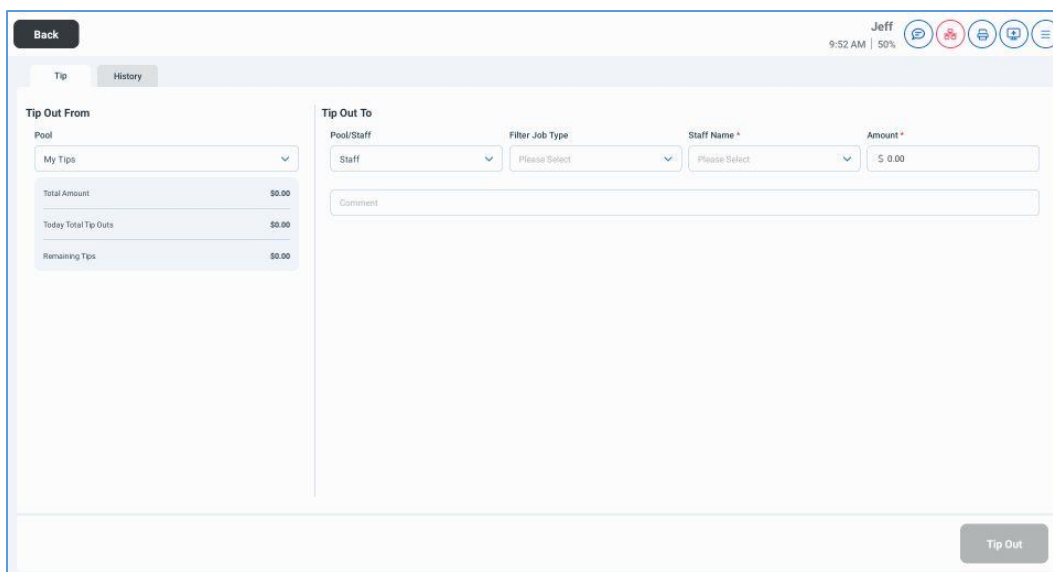
Tipping Out to Another Staff Member

These procedures describe how to perform a tip out to a specific staff member.

- 1 In the POS Room screen, tap the **Options** button, then tap **Tip Out**.



The POS displays the **Tip Out** screen.



- 2 On the **Tip** tab, in the **Tip Out From** area, in the **Pool** list, select the tip pool from which you want to move funds.

The **Pool** list's default selection is **My Tips**, which is the current total tips of the staff member performing the tip out.

When you select a tip pool, the POS displays that tip pool's total amount, total tip outs for the current day, and its remaining tips.

- 3 In the **Tip Out To** area, in the **Pool/Staff** list, select **Staff**.
- 4 In the **Filter Job Type** list, select the job type of the staff member receiving the tip out.

When you select a job type in this list, the POS filters the **Staff Name** list to only include staff members associated with a selected job type.

- 5 In the **Staff Name** list, select the name of the staff member who will receive the tip out.
- 6 In the **Amount** box, type the dollar amount of the tip out.

- If necessary, you may enter a descriptive comment in the **Comment** box.

- Tap **Tip Out**.

The POS will prompt you to verify the transaction.

- Tap **OK**.

The POS transfers the entered amount from your tips to the staff member's tips.

Tipping Out to a Group Pool

These procedures describe how to perform a tip out to a specific tip pool.

- In the POS Room screen, tap the **Options** button, then tap **Tip Out**.

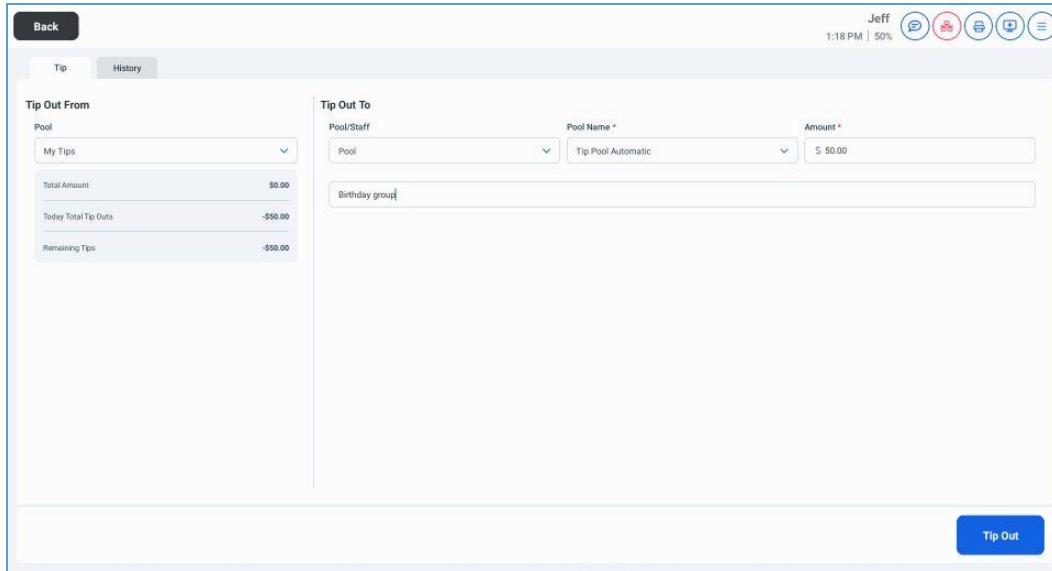
The POS displays the **Tip Out** screen.

- On the **Tip** tab, in the **Tip Out From** area, in the **Pool** list, select the tip pool from which you want to move funds.

When you select a tip pool, the POS displays that tip pool's total amount, total tip outs for the current day, and its remaining tips.

- In the **Tip Out To** area, in the **Pool/Staff** list, select **Pool**.
- In the **Pool Name** list, select the name of the tip pool that will receive the tip out.
- In the **Amount** box, type the dollar amount of the tip out.

6 If necessary, you may enter a descriptive comment in the **Comment** box.



7 Tap **Tip Out**.

The POS will prompt you to verify the transaction.

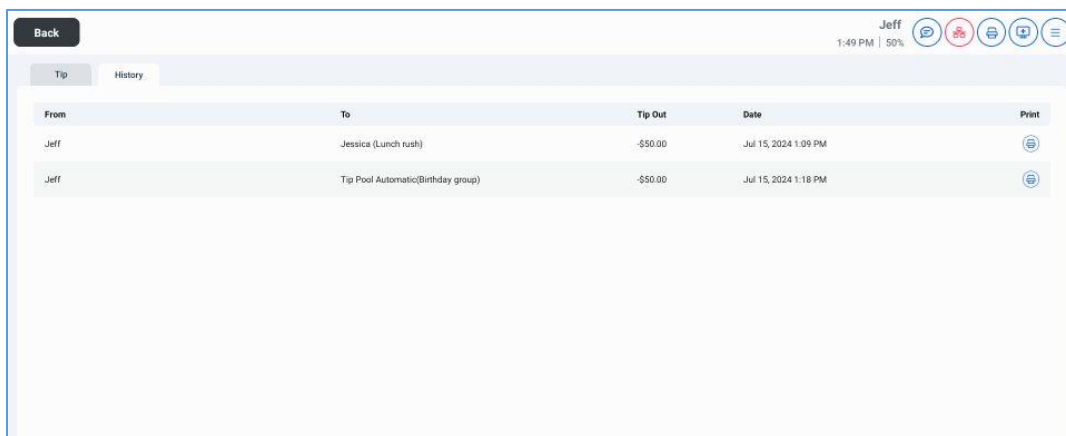


8 Tap **OK**.

The POS transfers the entered amount from your tips to the selected tip pool.

Reviewing Tip Out History

When necessary, you can review the history of past tip out transactions in the Tip Outs screen. In the Tip Out screen, tap the **History** tab.



The **History** tab displays a report listing past tip out transactions, including the source of each step out, the recipient of each tip out, the amount of each tip out, and the date and time that each devout was performed.

Each transaction listed in the report includes a **Print** button. If you tap a transaction's **Print** button, the POS will prompt you to select a printer, then print the details of that tip out.

No Sale

If your POS is associated with a cash drawer, you can use the **No Sale** option to perform a "No Sale" transaction to open the drawer. In the POS Rooms screen, tap the **Options** button in the top right corner, then tap **No Sale**.

The POS will only perform this task if you are in a job type with access to the cash drawer and set with the "No Sale" permission enabled.

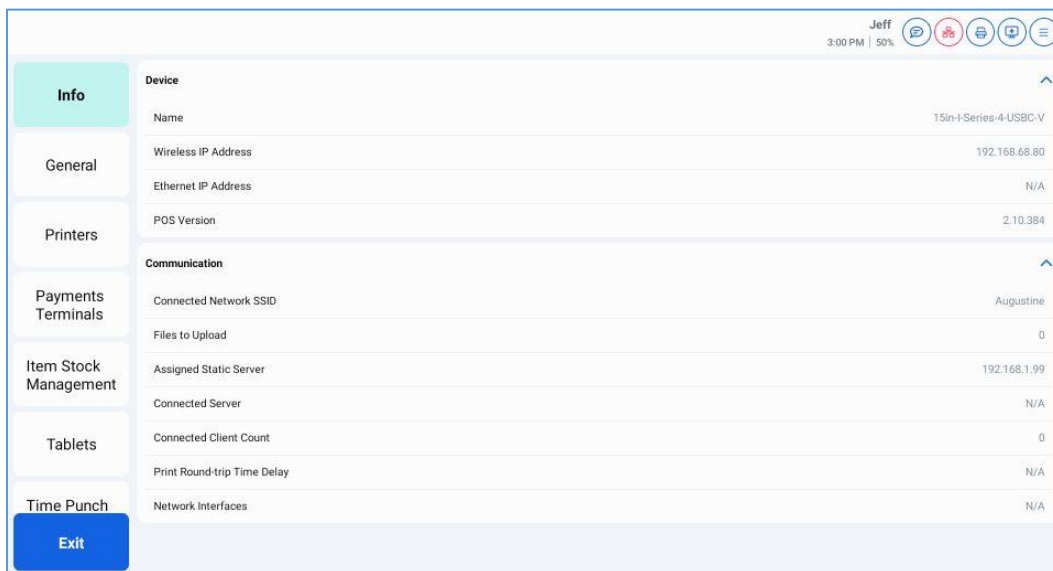
Manager Settings Menu

To access the **Manager Settings** menu, tap the **Options** button (☰) in the POS Rooms screen, then tap **Settings**. The **Manager Settings** menu includes the following screens:

- ▶ Info
- ▶ General
- ▶ Printers
- ▶ Payment Terminals
- ▶ Item Stock Management
- ▶ Tablets
- ▶ Time Punch Management
- ▶ Logs
- ▶ Daily Review

Info Screen

The Info screen displays a list of information about the POS running on this device.



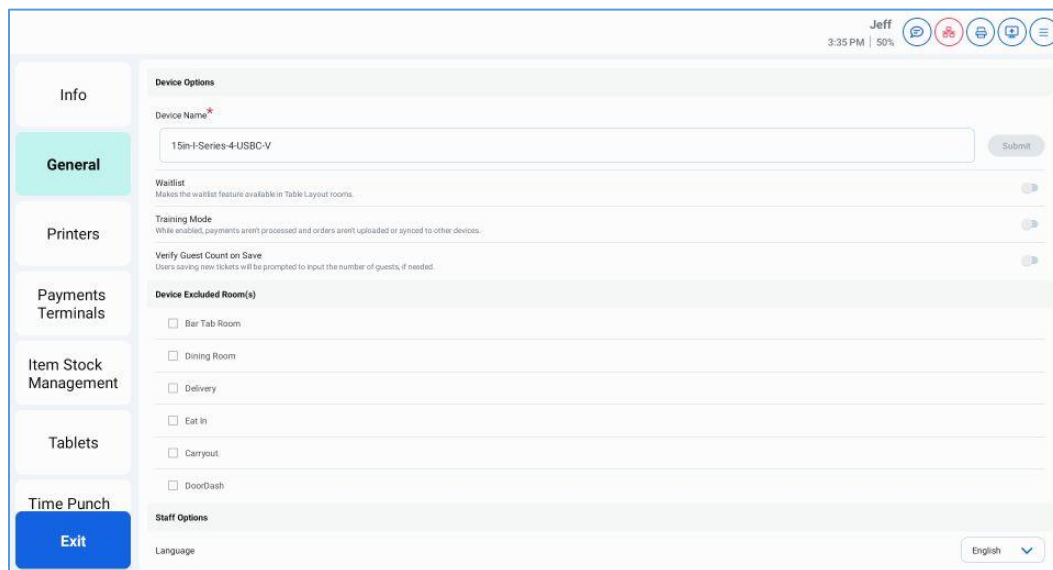
The Info screen is divided into the following sections, each listing different types of information:

Device: Technical information about the POS device itself, such as its name, IP addresses, and the POS app's version number.

Communication: The device’s communication settings, such as its network SSID, connected servers and client counts (if any), and network interfaces.

General Screen

The General screen includes a list of controls that enable the manager to enable, disable, or modify various functions within the POS.



Device Options

Device Name: The name of the NextGen device.

Waitlist: If you enable this switch, the POS will make the wait list accessible and visible in Table Layout screens.

Training Mode: If you enable this switch, the POS will run the POS in “training mode.” While running in training mode, the POS will not process any payments performed on it or synchronize its orders with other devices. Training mode enables staff in training to open tickets or perform payments without generating actual data in the location’s system files.

Verify Guest Count on Save: If you enable this switch, the POS will prompt servers to enter the number of guests on the ticket (if they have not already done so) when they save a new ticket.

Device Excluded Room(s)

The **Device Excluded Room(s)** section includes a list of the location’s rooms. If you select one or more of the rooms in this list, the POS will not allow staff members to access them or associate new tickets with them or their tables.

Staff Options

The **Staff Options** section includes only the **Language** control, which enables you to select which language the POS uses when displaying its labels and text.

Tab Room Ticket Sort

The **Tab Room Ticket Sort** section includes a list of options that enable you to set how the POS sorts tickets in the Ticket screens for tab rooms. You can set the POS to sort tickets by one of the following methods:

- ▶ Newest Tickets First (based on the time they were created)
- ▶ Oldest Tickets First (based on the time they were created)
- ▶ Alphabetical by Guest Name

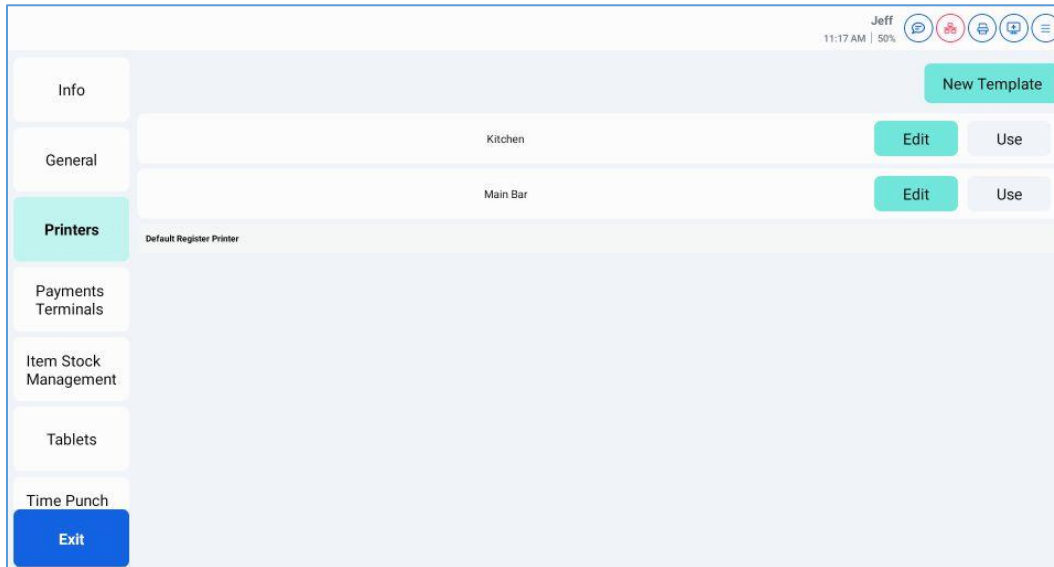
Auto Logout

The **Auto Logout** section includes a list of logout duration options. If you select a time option in this list, the POS will automatically log out if it is idle for the selected duration of time. You can select one of the following durations:

- ▶ 30 seconds
- ▶ 1 Minute
- ▶ 2 Minutes
- ▶ 5 Minutes
- ▶ 10 Minutes
- ▶ 1 Hour

Printers Screen

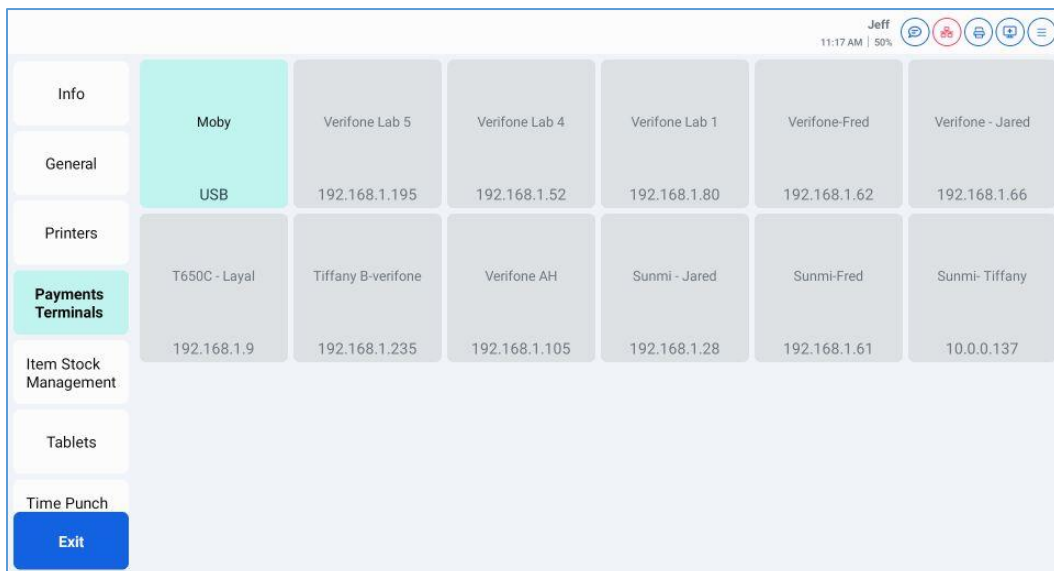
The Printers screen, which enables you to configure the POS on each NextGen device to use a specific default register printer. The POS requires a default register printer in order to print guest checks or use an attached cash drawer.



For procedures describing how to create and configure printer templates, review the earlier section on “Setting a Printer Template for the Device”.

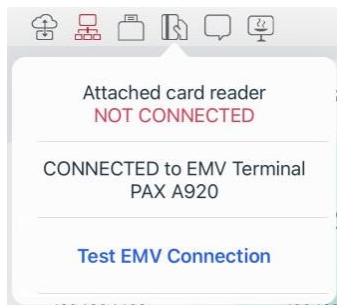
Payment Terminals Screen

The Payment Terminals screen enables you to set up payment terminal (such as a PAX card reader device) to each NextGen POS station. The Payment Terminals screen displays a list of tiles, each representing a payment terminal on the location’s network. Terminals available to your current device display in light green.



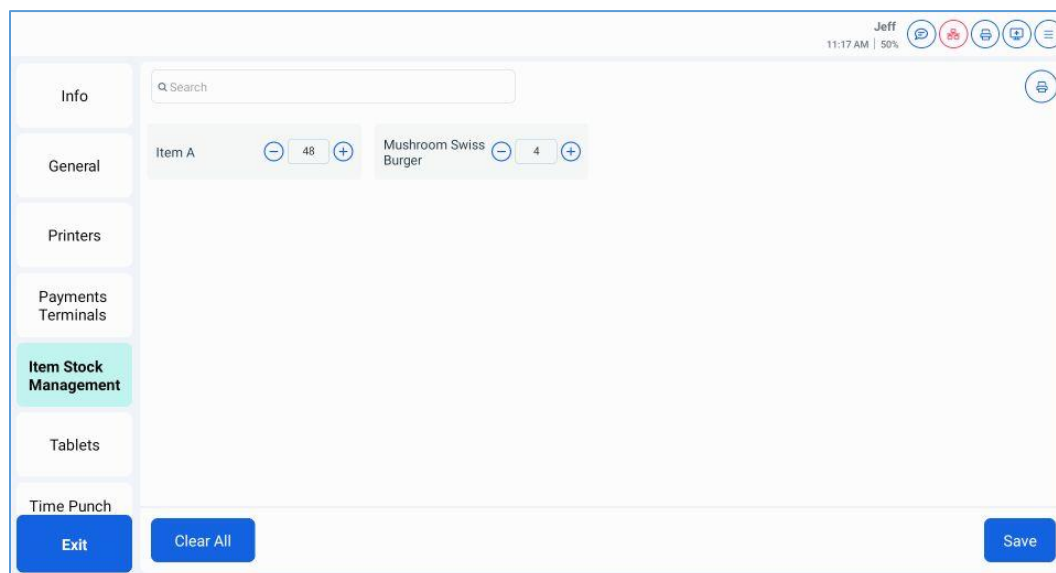
To associate the POS with a payment terminal, tap the tile of an appropriate and available device. The POS will attempt to connect to the selected device.

You can verify the connection at any time by tapping the **Card Reader** icon in the POS Rooms screen. The POS will display a panel listing the statuses of all its card readers. If the POS connected successfully, the list will display its status as **CONNECTED**.

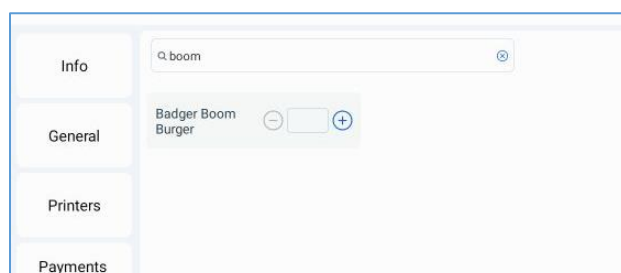


Item Stock Management Screen

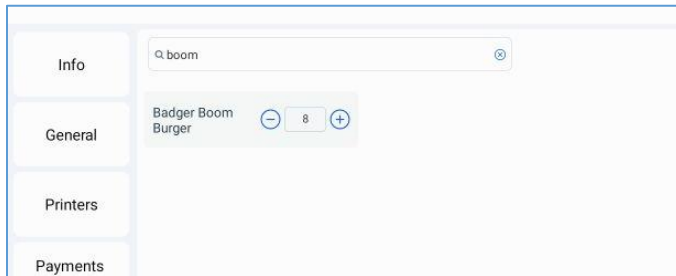
The Item Stock Management screen enables you to edit the stock counts of multiple menu items from within a single screen. It includes controls that enable you to search for items by category or menu section, enabling you to find and edit stock counts for multiple items.



To edit an item's stock count, you must first find the item and add it to the screen. Enter part of the item's description in the **Search** box. If the POS finds one or more matching items, it will display them as tiles in the screen.



After finding the appropriate item, you can enter a new count directly in the item's **Count** box, or modify the existing count by tapping the **+** and **-** buttons.

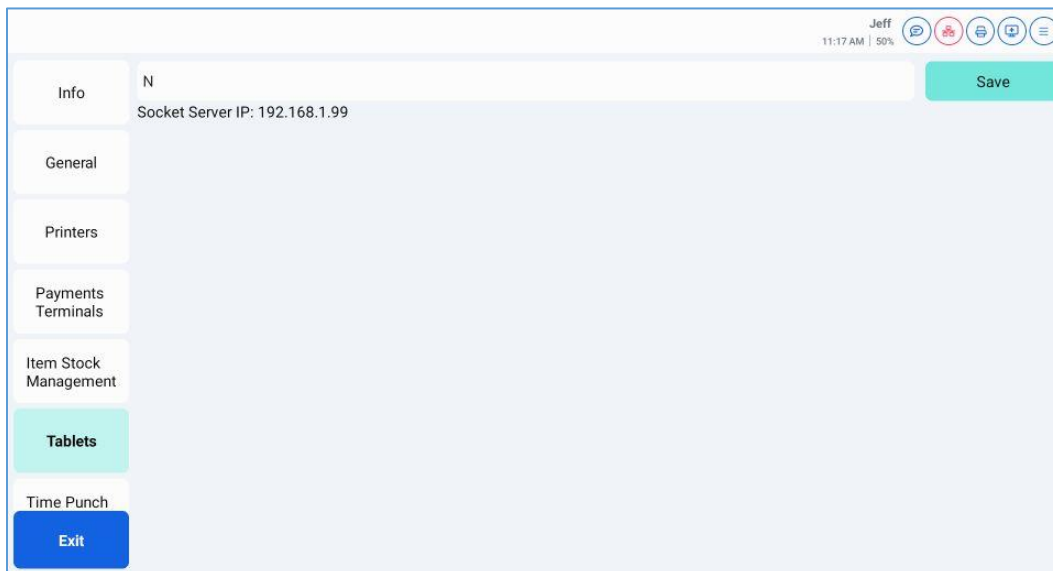


After editing the stock counts of all necessary items, tap **Save** to save the new counts. Tap **Clear All** to clear all current item tiles from the screen.

To designate an item as out of stock, set the item's stock value to "0". In the Order screen, the POS will display out-of-stock items in red. If you set an item's stock value to "0", servers and customers will be unable to order the item in the POS or the Online Order website.

Tablets Screen

The Tablets screen enables you to add or edit the POS's ticket prefix. A ticket prefix is a string of characters, up to four characters long, that the POS adds as a prefix to new ticket numbers. For instance, if you enter the letter "A" as a ticket prefix, the POS will add it as the first character of the ticket numbers it generates for new tickets created on its device (such as "A12", "A13", "A14", and so on).

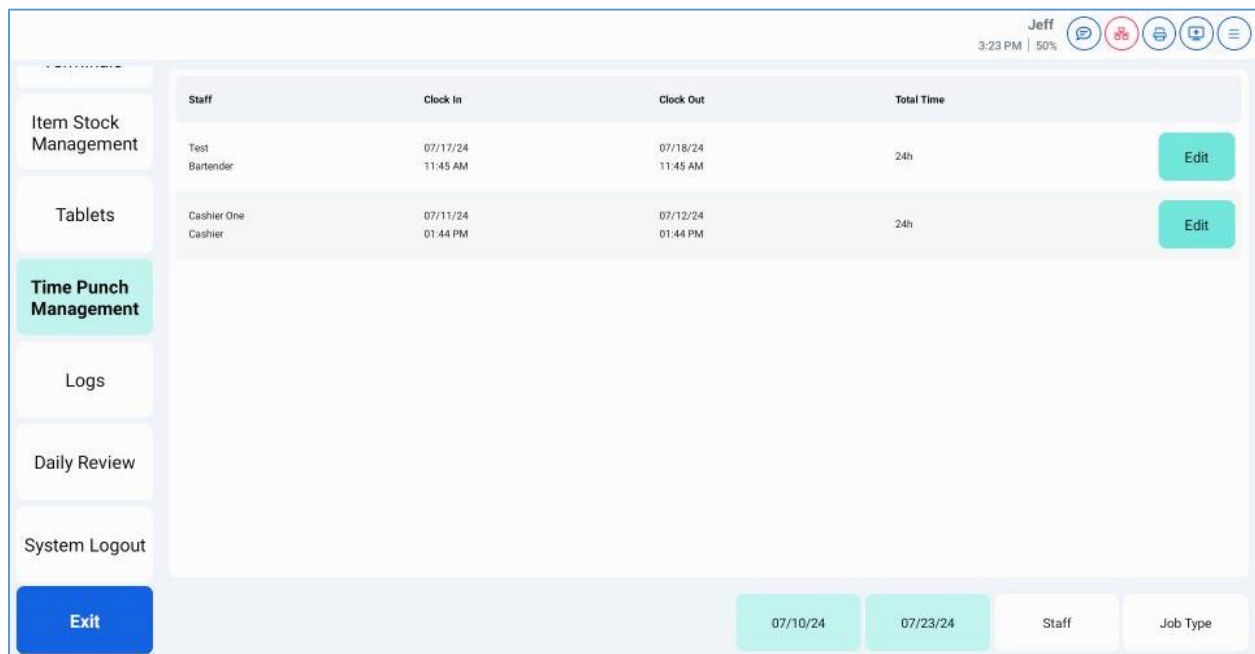


In the **Tablets** screen, you can set or edit the ticket prefix by entering a string of one to four alphanumeric characters in the **Ticket Prefix** box, then tap **Save**.

If you use ticket prefixes, you must use a unique prefix for each POS device. We recommend using alphabetical characters, to better differentiate the prefix from the numerical ticket number.

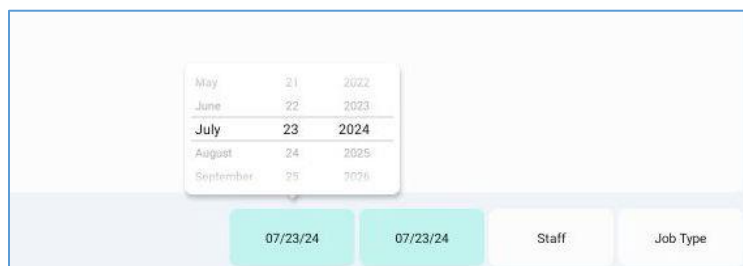
Time Punch Management Screen

The Time Punch Management screen enables you to edit or delete time punches, which are records of when a staff member clocks in or clocks out of the POS.



The Time Punch Management screen's bottom panel features several search options to enable you to find a time punch to edit.

The two green buttons are **Date Range** settings, which you can use to set a date range. If you tap the **Start Date Range** button (on the left), the POS displays a date selection control, allowing you to select an appropriate start date. If you tap the **End Date Range** button (on the right), the POS displays another date selection control, allowing you to select an appropriate end date.

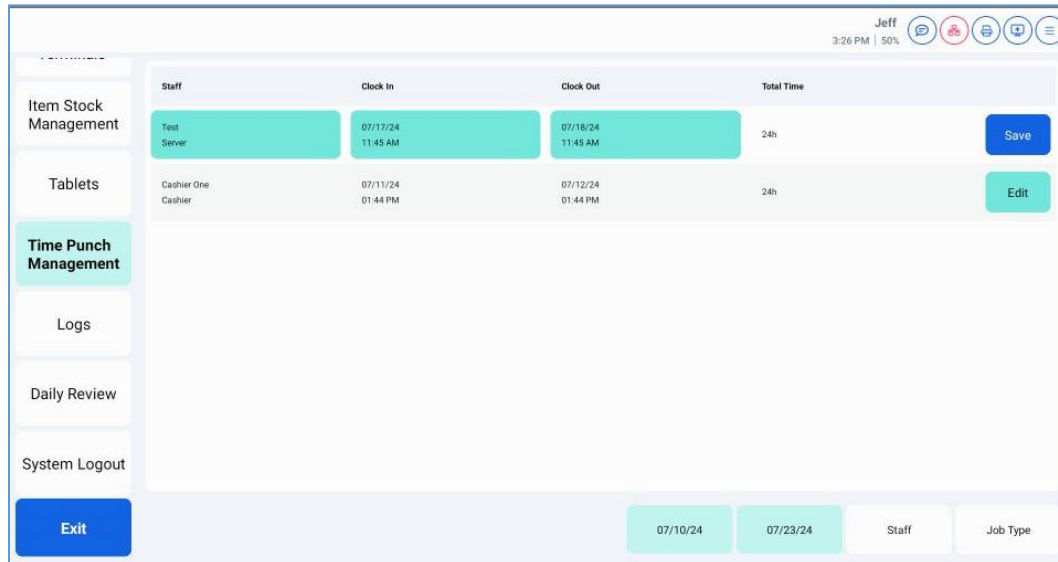


After you select a start date and end date, the POS will display all time punches performed within that date range.

In the bottom panel, if you tap **Staff**, the POS displays a list of staff members who have time punches performed within the designated date range. If you select a staff member, the POS will display all time punches for that staff member.

In the bottom panel, if you tap **Job Type**, the POS displays a list of job types. If you select a job type, the POS will display all time punches for staff members working in the selected job type.

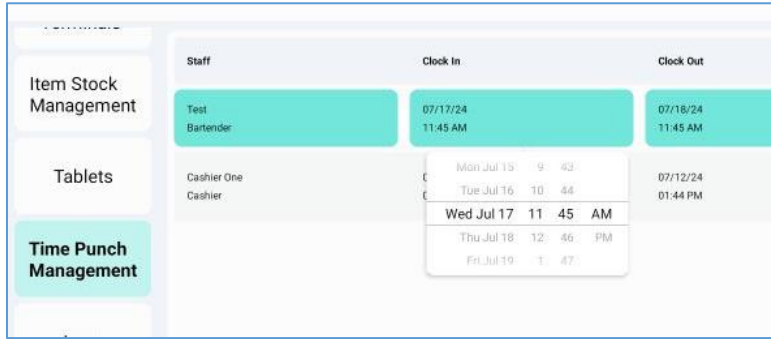
Once you find the desired time punch, you can edit the record by tapping its **Edit** button. The POS will highlight its **Staff**, **Clock In**, and **Clock Out** settings.



If you tap the time punch's **Staff** tile, the POS displays a list of all of the staff member's associated job types. If you tap one of these job types, the POS will edit the time punch's current job type to the one you select.



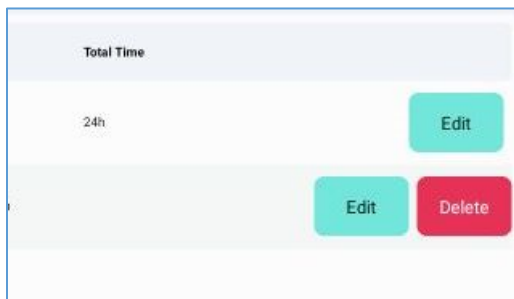
If you tap the time punch's **Clock In** or **Clock Out** tile, the POS displays a date and time selection control, allowing you to set a new date or time of day for the record's clock in or clock out setting.



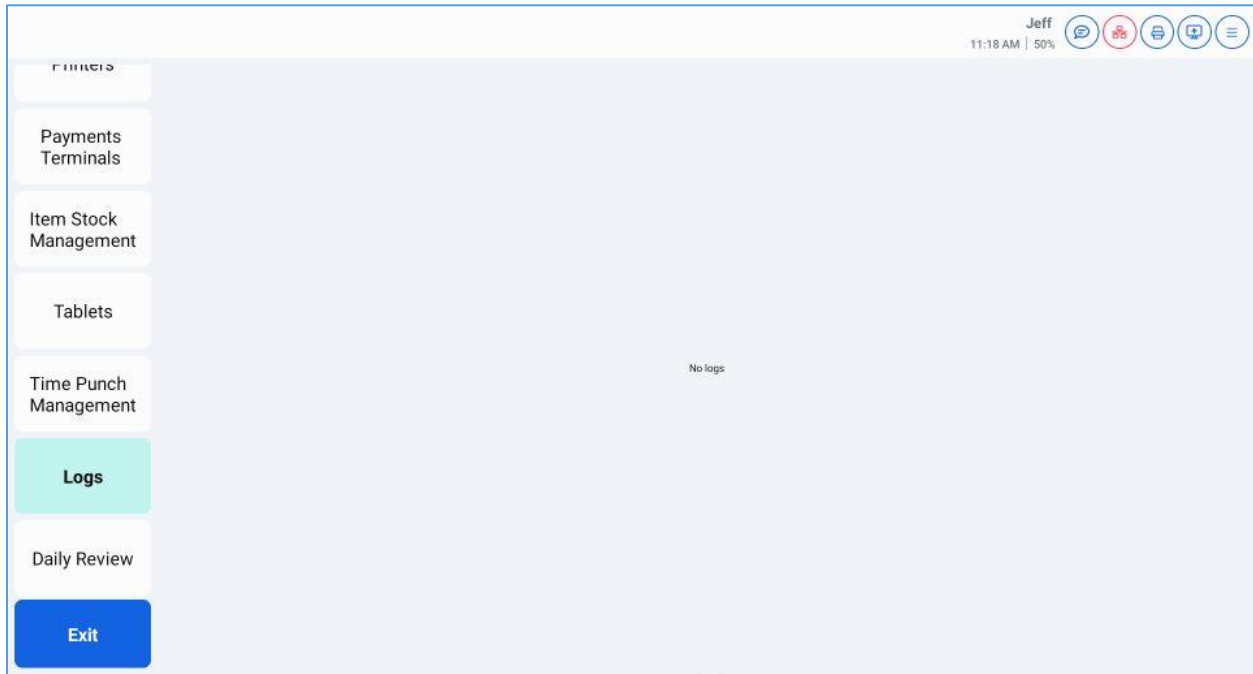
Once you have made the necessary edit to the time punch, tap its **Save** button to save the new settings.



To delete a time punch, swipe left to reveal its **Delete** button, then tap **Delete**.



Logs Screen

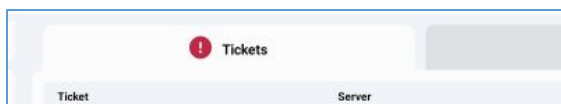


Daily Review Screen

The Daily Review screen enables managers to quickly review what transactions are left to be resolved during end-of-day procedures. To access the POS Daily Review screen, tap the **Options** button, then tap **Settings**. In the **Settings** menu, tap **Daily Review**.

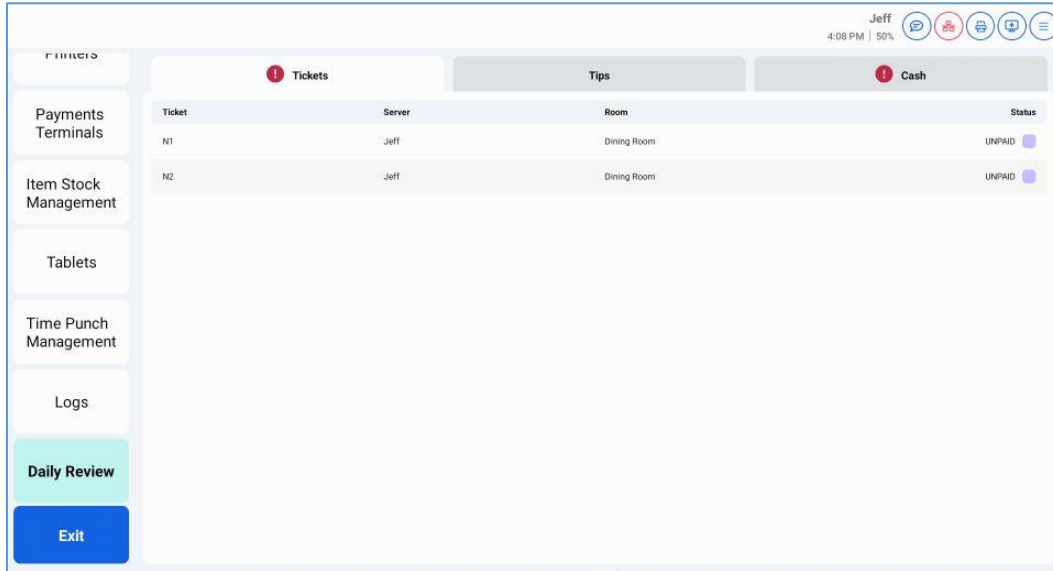
The POS displays the Daily Review screen, which includes three tabs: **Tips**, **Tickets**, and **Cash**. Each tab displays a list of transactions performed during the current day. These tabs enable you to review all of the day's tips, tickets, and cash transactions and, if necessary, edit them before ending the day.

If there are any unresolved transactions in any of these sets, its tab will display a red "!", enabling you to see at a glance if there are any transactions in any set that need action.



Tickets Tab

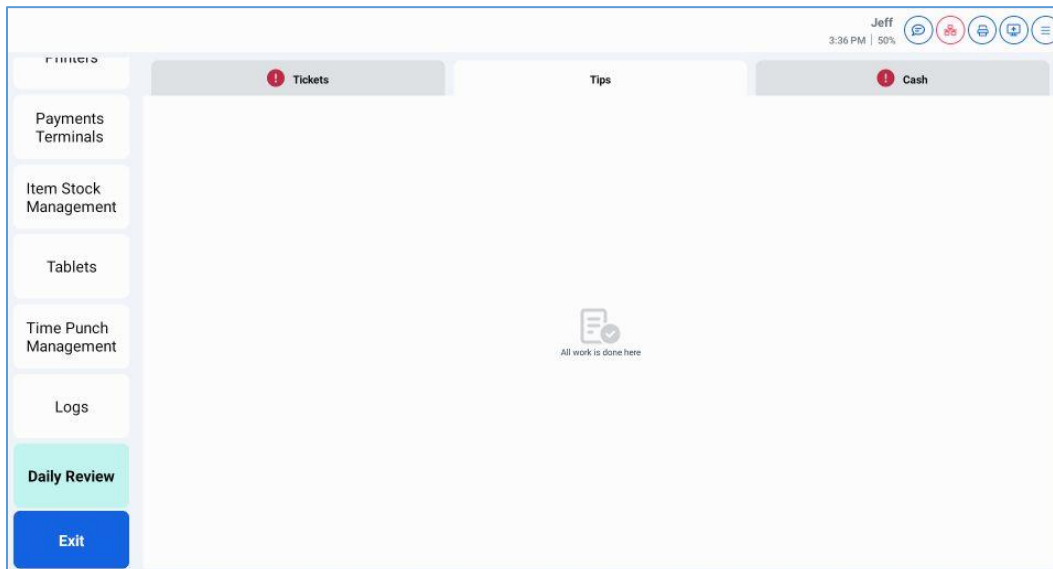
The **Tickets** tab displays a list of all tickets that have not been closed. For each ticket, the screen displays the ticket's number, server, room, and status. The screen only displays tickets with a status other than "Closed".



If you tap a ticket in the list, the POS will open the ticket, allowing you to review its details and take any necessary steps to close it (or advise its server on how to close it).

Tips Tab

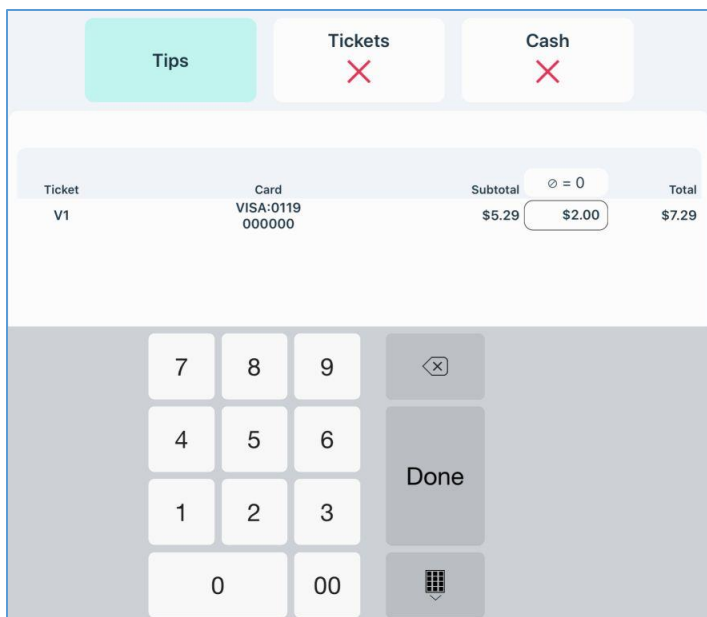
The **Tips** tab displays a list of transactions that were closed without a tip amount. In this tab, you can edit each transaction and enter an appropriate tip.



- 1 To enter a tip amount to a ticket, tap the ticket's **Tip** box in the list.

The POS will display a keypad at the bottom of the screen.

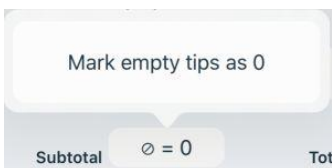
2 Enter a tip amount with the keypad, then tap Done.



3 To access a ticket, tap its name in the list.

To POS will open the ticket, allowing you to review its details and (if desired) enter a tip amount.

4 To enter a tip value of “\$0” in all transactions in the list, tap the Empty Tips button, then tap Mark empty tips as 0.



5 When you have finished editing tip amount for all necessary tickets, tap Submit Tips.

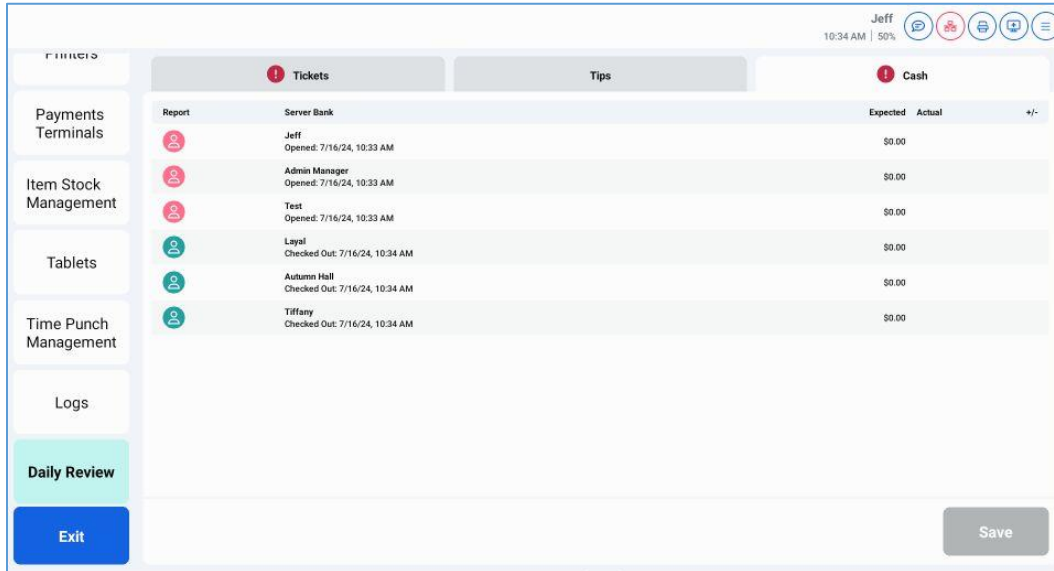
The POS will save the changes you have entered.

If your credit card processing is set to **Auth/Capture** tips must be captured to batch a transaction out at the end of day. When you use this method, you'll see a red X or a green checkmark indicator for this section. If you use **Sale/Adjust** or another processing method it allows you to view the screen, but does not show an indicator since it's not required for end of day.

Cash Screen

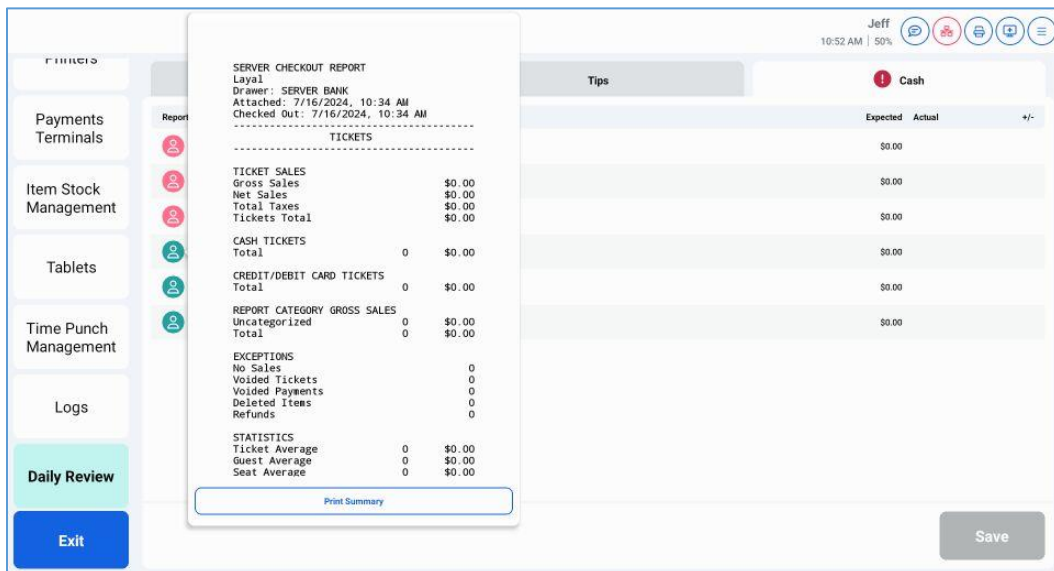
The **Cash** tab displays a screen listing all server banks and cash drawers currently open or checked in. For each bank in the list, the POS displays the name of its server, the date and time

when the bank was opened or checked in, its expected amount, its actual amount, and the difference (if any).

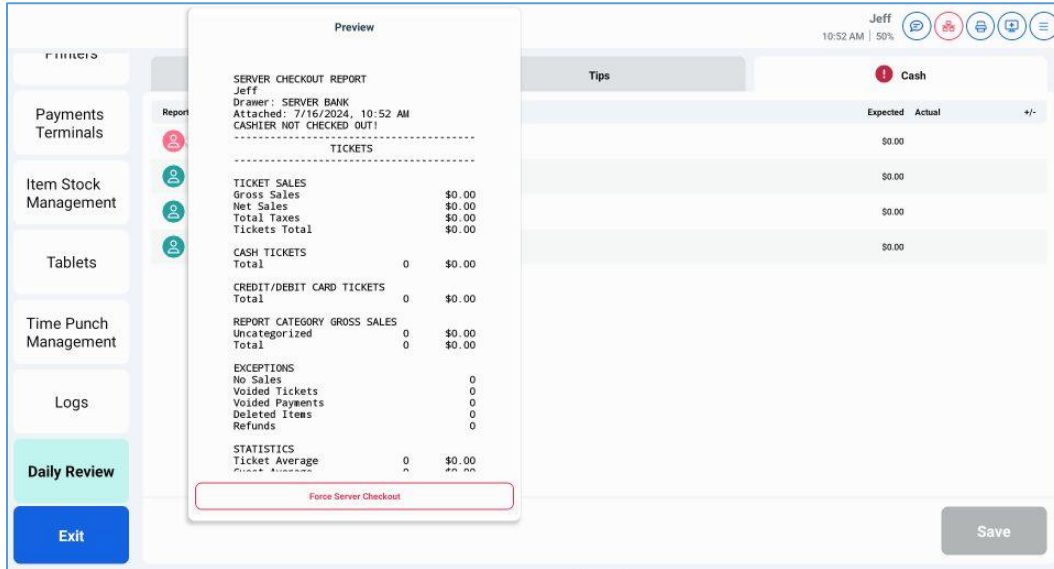


Each bank in the list includes a **Report** button. The POS displays it as green for banks that are completed (“Checked Out”) and red for banks that have not been checked in (“Opened”).

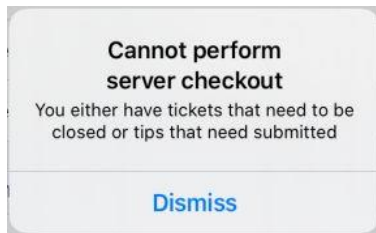
If you tap a server bank’s **Report** button, the POS displays the Server Checkout Report, with the details and subtotals of the checkout. If the checkout is already completed, you can print the report by tapping **Print Summary** (at the bottom of the report window).



If the checkout is incomplete, you can force the POS to close the checkout by tapping **Force Server Checkout** (at the bottom of the report window).



If all tickets are closed, the POS will allow you to force the checkout. If any tickets are still open, the POS will display an error.



Configuration for Credit Surcharges

The following section describes how to configure a Heartland Restaurant location to apply surcharges to credit card orders processed with Heartland EMV, in accordance with Heartland's Credit Surcharge Program.

Configuring the PAX BroadPOS

To use the credit surcharge feature, you must open BroadPOS, access the Credit Features screen, and configure the settings in the **Others** area as follows:

Others			
Print Disclaimer *	Yes	Print Card Holder Name *	Yes
Receipt Option *	Both Merchant/Customer Copy	Manual Entry *	Enabled
Tip *	Enabled	Pre-Dial *	Disabled
Secure Card *	Disabled	Surcharge Fee Mode *	In Percentage
Surcharge Fee Name *	Convenience Fee	Surcharge Flat Fee *	0.00
Surcharge in Percentage(0-9.99)% *	3.50	Print Surcharge Fee on Receipt *	Enabled

If you have any questions about this, or require assistance verifying settings, please contact [PAX Support](#) or [Product Ops Integration](#).

Configuring the PAX Payment Gateway

To use the surcharge feature, you must also set the program to use the Heartland SDK PAX interface. These procedures assume you have already selected a payment gateway (either BridgePay or Monetary) and entered its necessary connection settings.

- 1 Access the Admin Console.
- 2 In the Main Menu, click **Location Setup**, then click **Payment Gateway**.
- 3 In the Payment Gateway screen, in the **In-Store Settings** tab, select **PAX** in the **EMV Solution** list.

The program will display the **PAX Interface** list and the **Portico Direct** check box.

- 4 In the **PAX Interface** list, select **Heartland SDK**.

- 5 Click **Save**.

Adding the Surcharge Clause to Customer Receipts

The surcharge feature is enabled in the BroadPOS, not in the Admin Console. However, you do need to configure customer receipts to include a message alerting customers to possible surcharges. You must also verify that the POS will print the accurate surcharge amount in the clause.

- 1 In the Admin Console's Main Menu, click **Location Setup**, then **Customer Receipt**.

- 2 In the Customer Receipt screen, in the **Display** tab, select the **Show Surcharge Clause** check box.

When you select the **Show Surcharge Clause** check box, the **Credit Surcharge Amount** box displays below it.

- 3 If necessary, enter the accurate surcharge percentage amount in the **Credit Surcharge Amount** box.

If you enter a percentage amount in this box, the POS will use that amount as the “Surcharge fee” that appears in the printed surcharge clause. (Its default amount is 3.5%.)

4 Click **Save**.

The POS will now include a text message (the surcharge clause) on all printed customer receipts alerting customers that a surcharge might be added to the total if they pay with a credit card.

Whole	
Fries	1.00
1 Chicken Wings	12.99
12	
1.0 units @ 12.99/unit	
Buffalo Sauce	.00
Auto Grat	3.45
Subtotal	26.43
Tax 1	.67

Total	27.10
Suggested Tips	
15%=3.97 18%=4.76 22%=5.82	
A Surcharge of \$.95 may be added to this transaction if you use a credit card.	
Thank you for visiting us!	

If a customer does pay with a credit card, the POS will include the amount of the surcharge, clearly labeled as “Surcharge fee”, in the printed receipt.

XXXXXXXXXXXX1010	
TC:	
99D5CF5999788B14	
1 Turkey BLT	8.99
Whole	
Fries	1.00
1 Chicken Wings	12.99
12	
1.0 units @ 12.99/unit	
Buffalo Sauce	.00
Auto Grat	3.45
Subtotal	26.43
Tax 1	.67

Total	27.10
Surcharge fee	.95
M/C - xxxx4111	28.05

Balance Due	.00
Auto Grat	3.45
AMOUNT	28.05
TIP	5.00
TOTAL	33.05