

Heartland

Restaurant

Mobile 2.0 Setup Guide

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Date	Version	Author	Summary
05/26/2024	1.0	JWD	Original document introduced.
11/07/2024	2.20 APK	JWD	Setup procedures moved to "Mobile 2.0 Setup Guide". Updated screen images and controls.

Overview

This article describes how to perform various tasks and transactions with the Mobile 2.0 POS after it is configured.

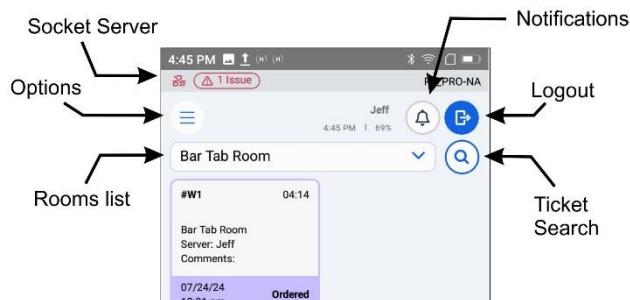
Using the POS (Basic Tasks)

The following sections describe the environment and features within the Mobile 2.0 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

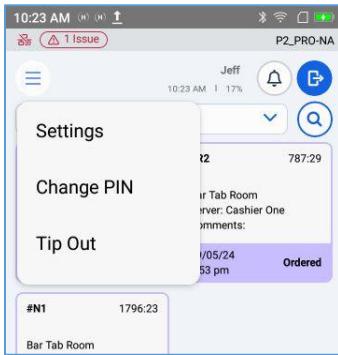
When you log into the POS, it displays the Room screen. In this screen, you can select a room and then access, review, or add tickets in that room. When you first log in, the POS accesses the first room in the **Rooms** list by default and displays it and its tickets (if any are currently open).

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

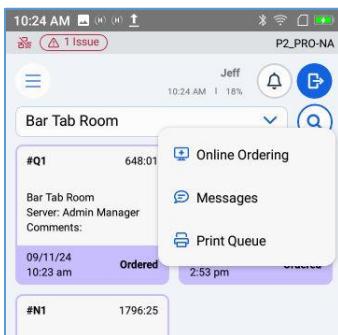


Socket Server: This icon displays the current connection status of the POS with the socket server.

Options: This button opens the **Options** menu, enabling you to access the Settings screen, the Change PIN screen, and the Tip Out screen.



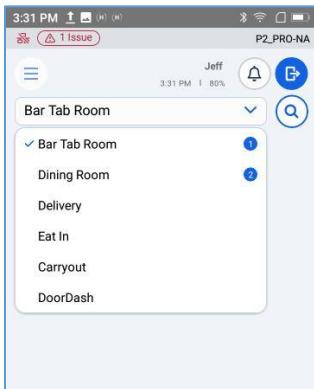
Notifications: This button displays a menu, providing access to the Online Ordering screen, the Messages screen, and the Print Queue.



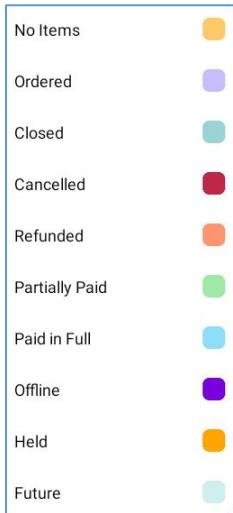
Logout: This button immediately logs you out of the POS.

Ticket Search: This button access the Ticket Search screen, with various options for searching for tickets, such as assigned server, room, and so on.

Rooms: This list enables you to access a different room in the Room screen. To access a different room, click the **Rooms** list and select another room.

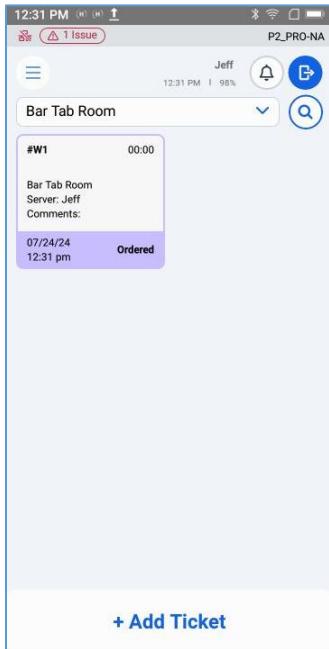


Regardless of the type of room you are viewing, the POS will always display the ticket tiles in the Room screen as highlighted by a color that indicates its current status:



Room Screen: Bar Service

In the Room screen, if you access a room that uses tabs, the POS displays the room without a table layout. Instead, it lists all occupied tables in the room as a list of tiles, each displaying the table's number, status, current server, the time it was opened, and the amount of time it's been occupied.



To open a ticket in a room with tabs, tap **+Add Ticket** at the bottom of the screen.

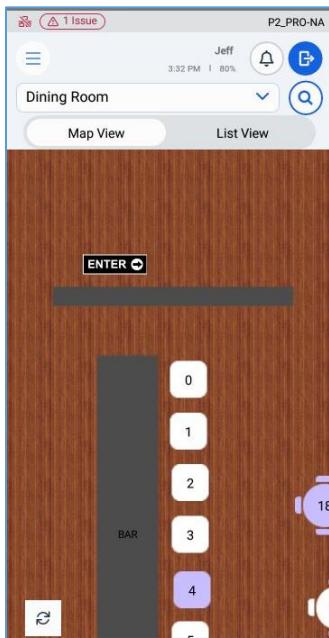
Room Screen: Table Service

If you access a room that uses table layouts, the Room screen includes two additional buttons in the Header panel, **Map View** and **List View**. These buttons enable you to view the room with or without its table layout.



If you tap **Map View**, the POS displays the room's table layout, with icons representing its available tables. In this view, tables with open tickets display as highlighted. If you tap **List View**, the POS displays the room's available tables as a list of tiles, each displaying the table's number. Again, tables with open tickets display as highlighted.

Map View



List View



To open a ticket in a room with a table layout, tap the icon or tile of an unoccupied table.

Ticket Screen

When you add a new ticket to a room, regardless of the room type, the POS opens a new ticket and displays the Ticket screen, listing the contents of the ticket. Within this screen, you can add, edit, or void items in the ticket, as well as perform other necessary actions.

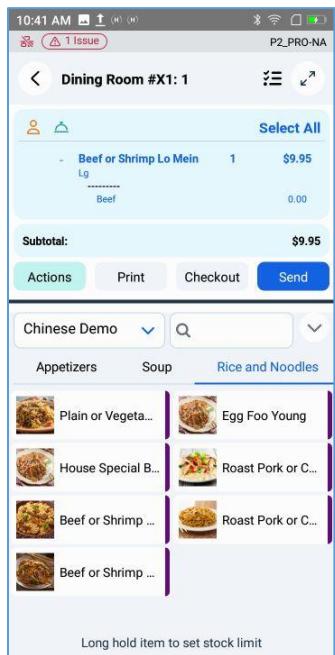
Modifying the Ticket View

You can view the Ticket screen in one of two modes, **Menu View** and **Expanded View**. By default, the POS opens the Ticket screen in **Menu View**, but you can change the screen's view mode by tapping the **View** button in the Header panel (beside the ticket number).

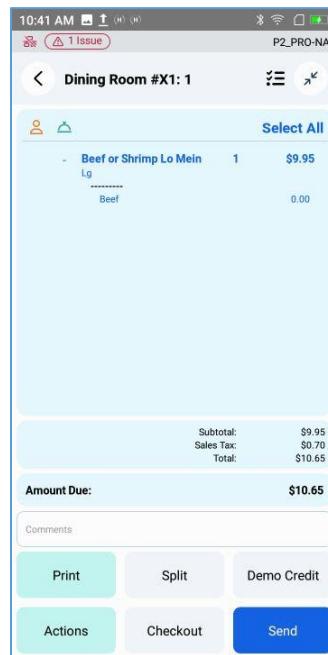


This button enables you to toggle the view mode between **Menu View** and **Expanded View**.

Menu View



Expanded View



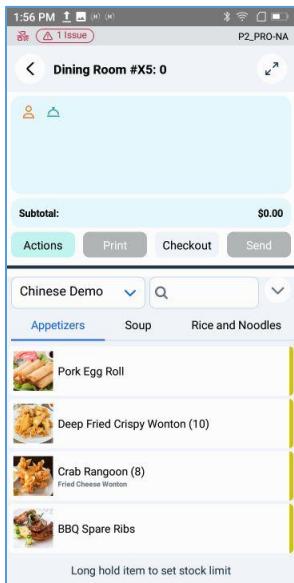
In **Menu View**, the POS displays the ticket in the top half of the screen and the item menu in the bottom half of the screen. In this mode, you can navigate the menu and add items, while still viewing the ticket. If necessary, you can scroll the ticket display up or down to review any obstructed areas of the ticket.

In a thin panel below the ticket display, the POS displays the ticket's current amount due. It also displays buttons for certain critical actions (**Print**, **Checkout**, and **Send**), but you must tap **Actions** to access most action options.

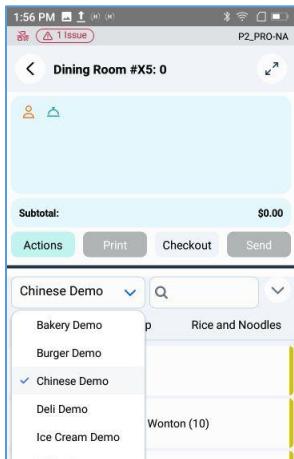
In **Expanded View**, the POS hides the item menu and displays the ticket in an expanded panel. In this view, the Ticket panel displays such details as the subtotal, sales tax, and total. Again, the bottom panel includes buttons for certain actions (**Print**, **Split**, **Customer**, **Checkout**, and **Send**), but you can tap **Actions** to access additional action options.

Ordering Menu Items in the Ticket Screen

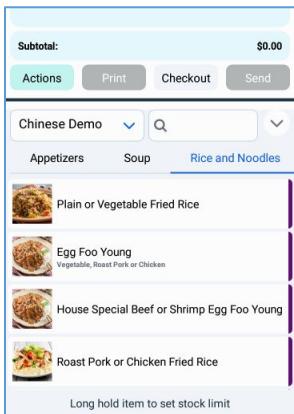
To add menu items to a ticket, access the ticket and display it in **Menu View**. As described above, in **Menu View** mode, the Ticket screen is divided between an upper Ticket panel and a lower Menu panel.



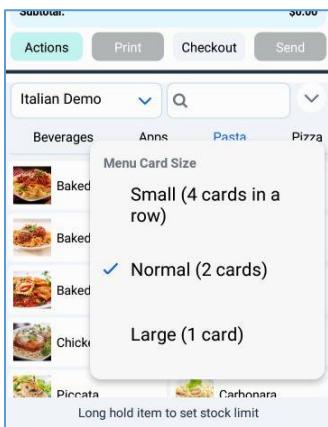
In the Menu panel, you can access the menu items in a specific menu group by selecting that group in the **Menu Group** list.



When you select a new menu group, the POS displays the menu sections associated with that group as tabs below the **Group** list. If you tap a section tab, the POS displays the menu items in that section. If the menu group includes more than four sections, you can scroll the section tabs left or right to access them.

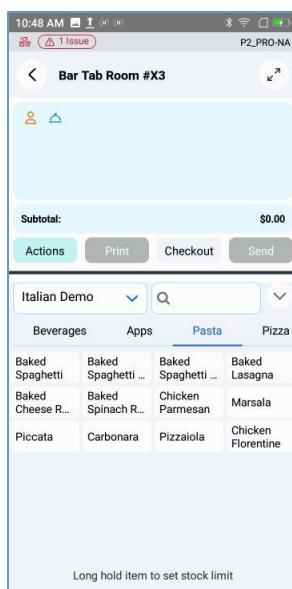


In the Ticket screen, you can modify how the POS displays the item tiles in its menus. In the Header panel, if you tap , the POS displays a list of size options.

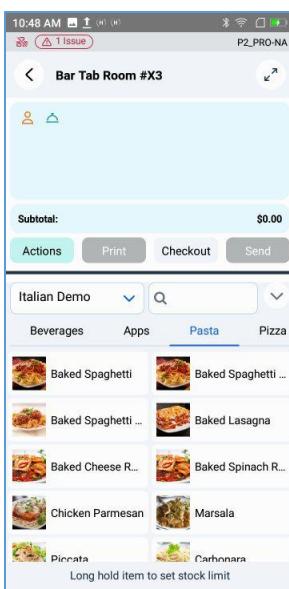


If you select **Small**, the POS will display its menu cards as small (four cards per row). If you select **Normal**, the POS will display its menu cards as medium size (two cards per row). If you select **Large**, the POS will display its menu cards as large enough to fill an entire row. Large cards display extra details about its item (if any are available).

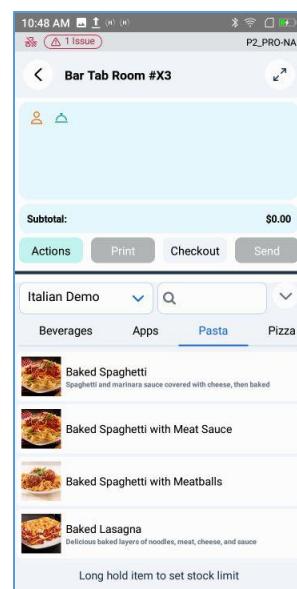
Small



Normal



Large



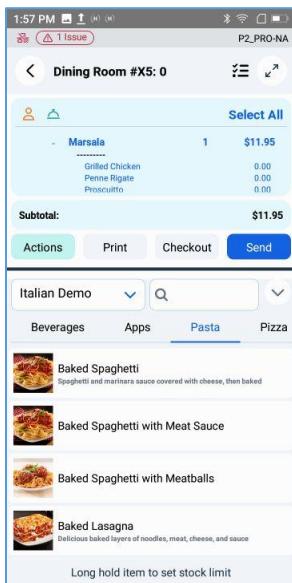
To add an item to a ticket, tap the item's card. If the item has no modifiers, the POS adds it to the ticket. If the item does have modifiers, the POS displays its modifier options.



When you select a modifier, the POS highlights the selected button as light green.



After selecting all appropriate modifiers, tap **Done** to add the item to the ticket. In the Ticket screen, the POS displays the new item in blue text, indicating that it has not yet been sent to the kitchen printers.



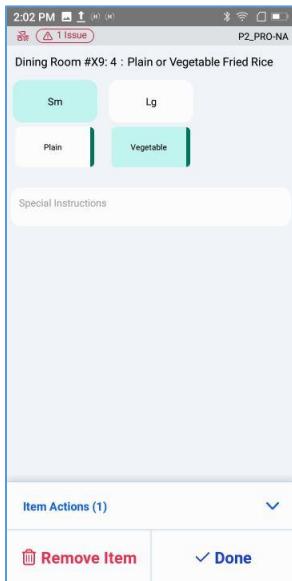
Instead of adding the item, you can remove the item and return the order screen by tapping **Remove Item**.



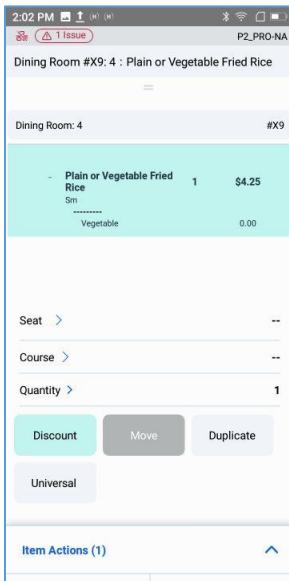
Item Actions

In any item's modifier screen, if you tap **Item Actions**, the POS opens the Item Actions panel at the bottom of the screen. This panel includes a preview of the item as it will appear in the ticket, as well as controls to edit the item's seat number and quantity.

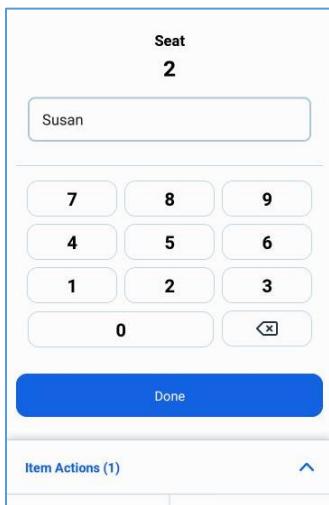
Item Actions Closed



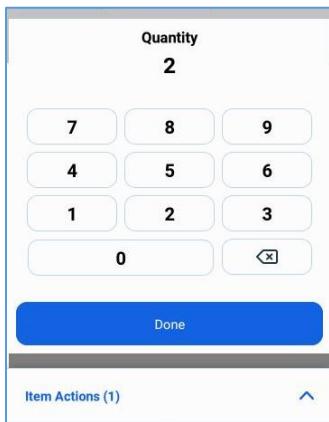
Item Actions Open



In this 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.



If you tap **Quantity**, the POS displays a keypad, enabling you to enter a new quantity for the item.

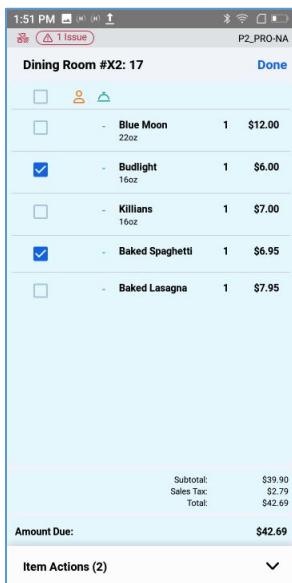


You can close the panel by tapping **Item Actions** again. When you add the item to the ticket, the seat number and quantity will display with the item.

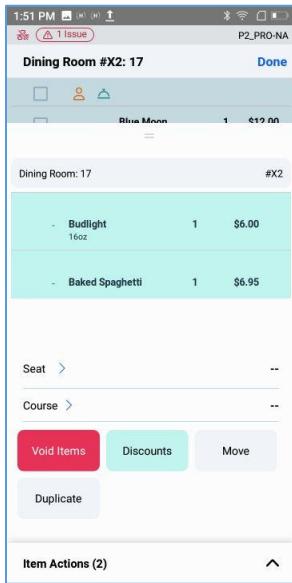
Item Selection Screen

After adding items to a ticket, if you need to perform an item action on multiple items, you can do so in the Item Selection screen. In the Ticket screen, you can access the Item Selection screen by tapping the **Selection** button (≡).

The Item Selection screen lists all of the items in the ticket, each with an adjacent check box. To select one or more items on the ticket, tap their respective check boxes.



After selecting one or more menu items, tap **Item Actions**. The POS displays the Item Actions panel at the bottom of the screen.

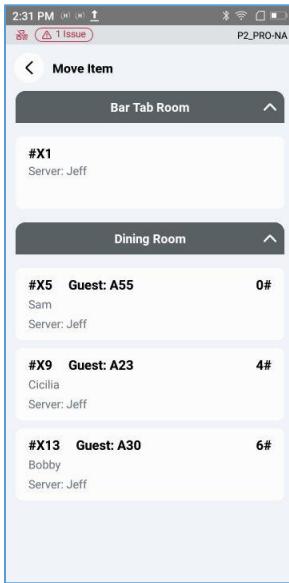


The Item Actions panel includes controls that enable you to apply certain settings to menu items. As described above, you can apply a seat number or course number to your selected items by tapping **Seat** or **Course**, then entering an appropriate number in the Seat or Course keypads.

To void all selected items, tap **Void Items**, then select an appropriate void reason in the **Reason for Void** panel.

To apply a discount to all selected items, tap **Discounts**, then select the discount in the Item Discounts & Promo screen. To remove the discount from an item, select the item in the Item Selection screen, access the Item Actions panel again, then tap **Remove Discounts**.

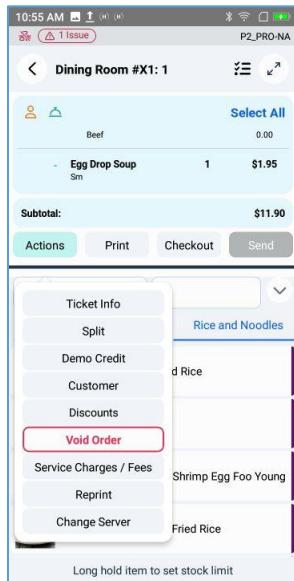
To move all selected items to another open ticket, tap **Move**, then select a ticket in the Move Item screen. The Move Item screen is divided into separate rooms, allowing you to move items to a ticket in any room the server can access.



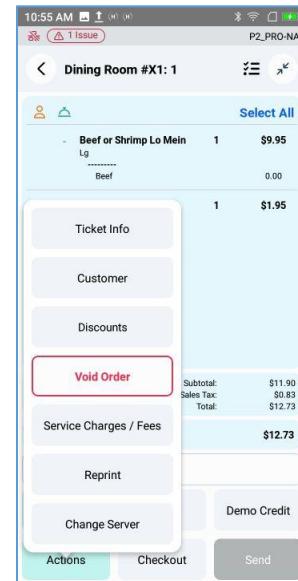
Ticket Actions

In the ticket display, the bottom panel includes buttons representing actions you can perform to modify or manage a ticket, such as **Send**, **Print**, or **Checkout**.

Most available actions are only accessible in the **Actions** menu. In the bottom panel, you can tap **Actions** to access a submenu with additional action options, such as **Service Charges**, **Discounts**, and **Void Order**.



Actions menu in Menu View



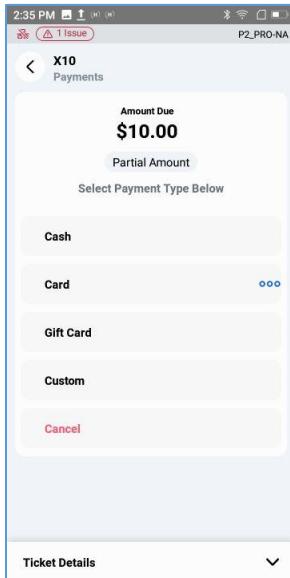
Actions menu in Expanded View

Print

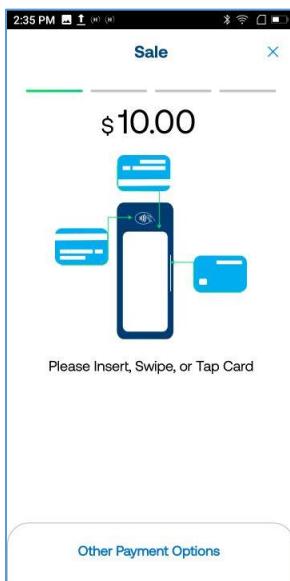
If you tap **Print**, the POS will send the ticket to the receipt printer.

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.

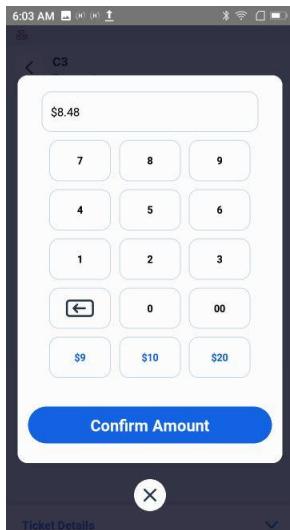


If the customer pays with a credit card, tap **Card**.

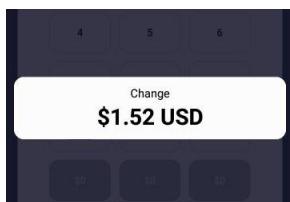


If the customer pays with cash and gives the exact amount of the ticket, tap **Cash**. The POS will automatically pay the ticket with cash for its total amount.

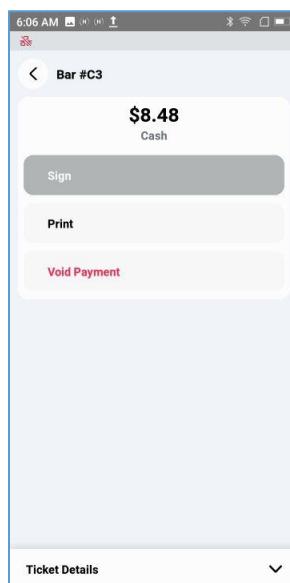
If the customer pays with cash and gives an amount greater than the ticket's total, tap **Partial Amount**. The POS will display a keypad, enabling you to enter the amount of cash given.



If you enter the given amount and tap **Confirm Amount**, or if you tap one of the suggested tender amounts, the POS will pay the ticket with cash and then display the total change due.



After applying a payment, if you need to print a receipt for the customer, tap **Print**. If you need to remove the payment, tap **Void Payment**.

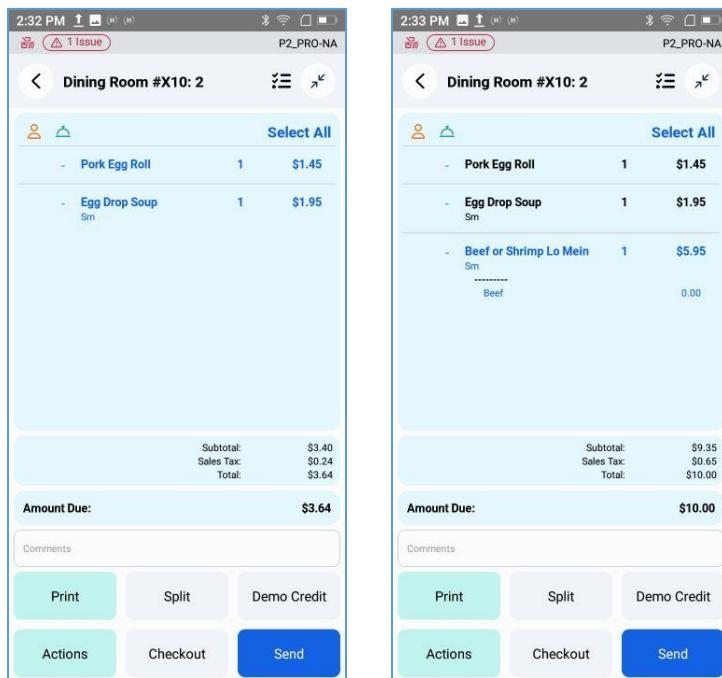


If you tap **Ticket Details**, the POS will expand the bottom panel and display the contents of the check, with prices and totals. Tap **Cancel** to return to the Ticket screen.

Send

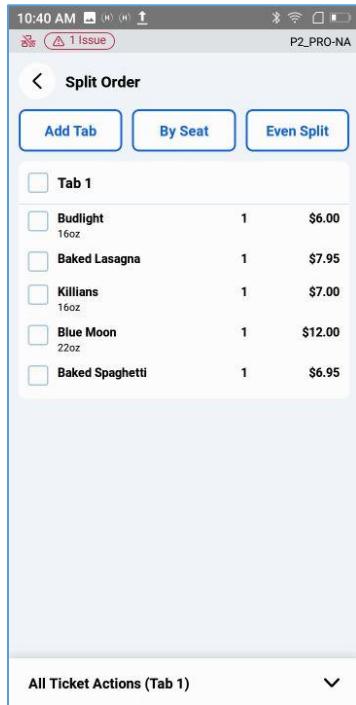
If you tap **Send**, the POS will send all ordered menu items on the ticket to the kitchen prep printers.

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.



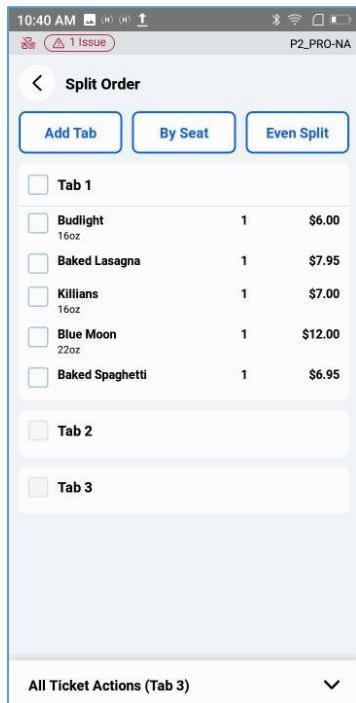
Split

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**.

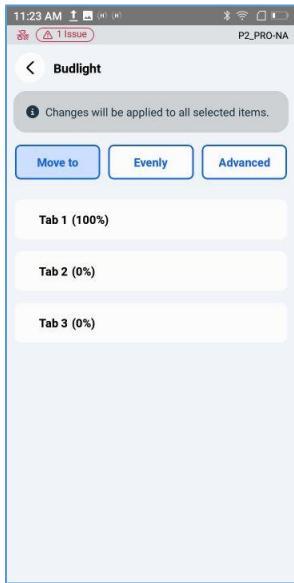


Add Tab

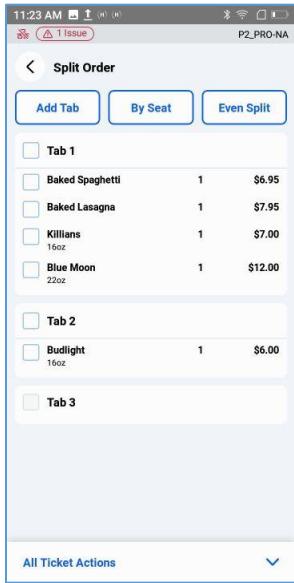
In the Split Order screen, if you tap **Add Tab**, the POS adds a new empty tab to the ticket. You can add as many tabs as are needed.



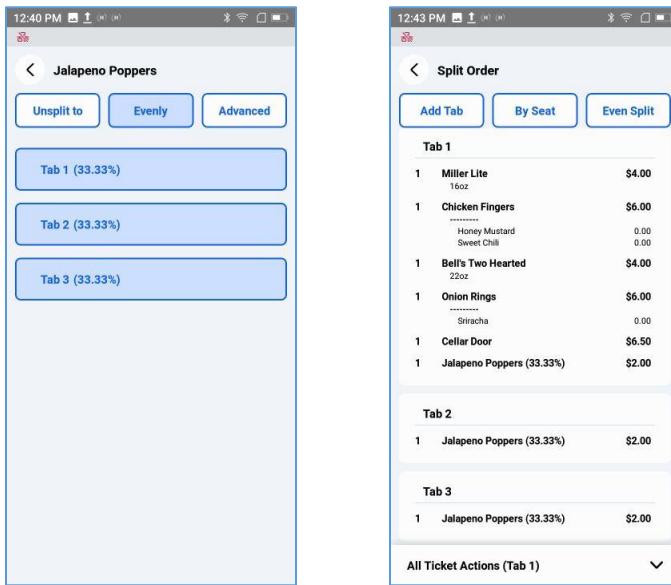
After adding a new tab, you can then move items from an existing tab to the new tab. If you tap an item, the POS displays multiple split options (**Move to**, **Evenly**, and **Advanced**). The POS also displays a list of buttons, each representing a tab, with the item's current tab highlighted.



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.



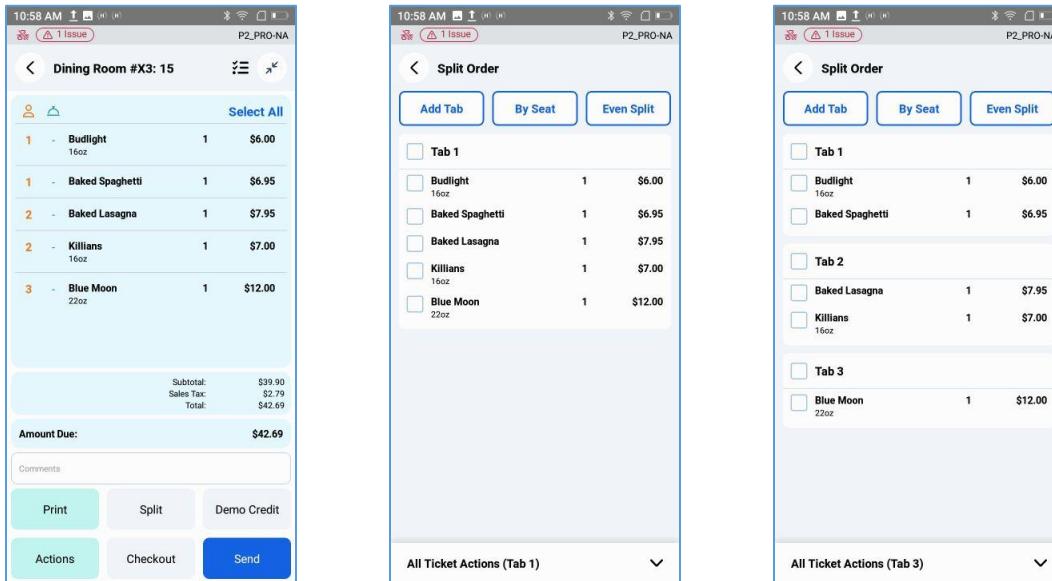
The **Evenly** option enables you to split a single item (and its cost) between two or more tabs. If you select **Evenly** and then tap one or more tab buttons, the POS splits the item between its current tab and the selected tabs.



In the Ticket screen, the POS displays the item in each of its tabs, with the percentage of the cost per tab displayed with the item's name. For instance, if you split an order of jalapeno poppers between three tabs, the POS will display it in each tab as "Jalapeno Poppers (33.33%)".

By Seat

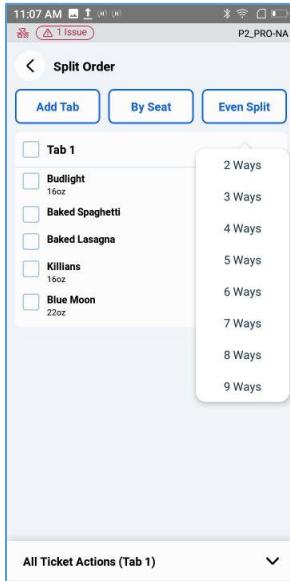
In the Split Order screen, if you tap **By Seat**, the POS creates a dedicated tab for each seat number on the ticket, and then moves all items to the tabs that correspond with their seat numbers.



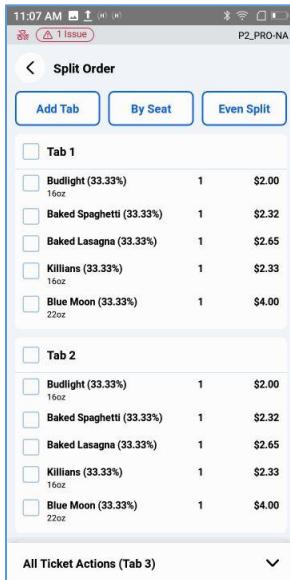
This method only works if you have already assigned seat numbers to the items in the ticket.

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).



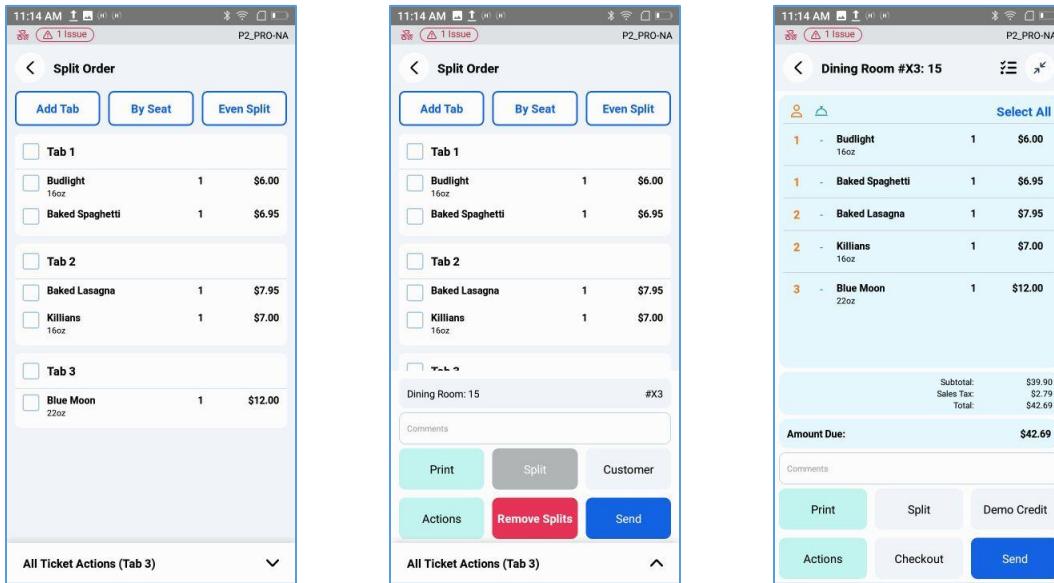
After selecting a split number, the POS adds new tabs equal to the number you selected, then splits every item in the ticket evenly between all tabs.



For instance, you may want to split a ticket with three customers on a single tab. Using the Split action, if you select **Split Evenly**, then select **3 Ways**, the POS would split the one existing tab into three tabs, then split every item on the ticket between the three tabs.

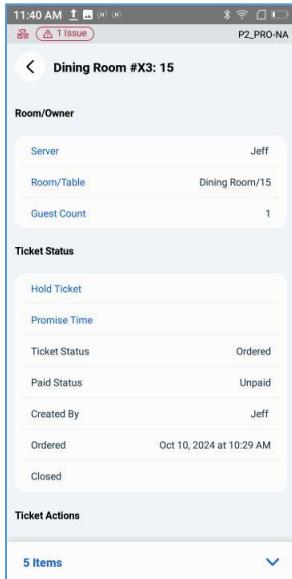
Removing a Split

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



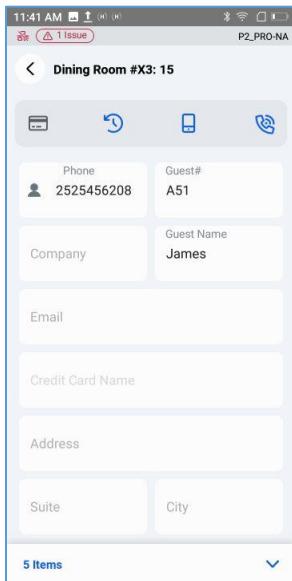
Ticket Info

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

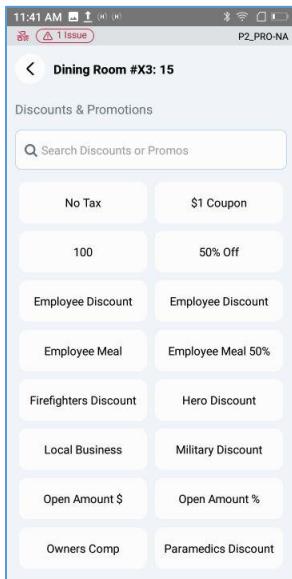
In the **Actions** submenu, if you tap **Customer**, the POS displays the Customer Info screen. If the customer already has a record saved in the account's data, this screen will display the customer's name and contact information (name, phone number, email address, and so on).



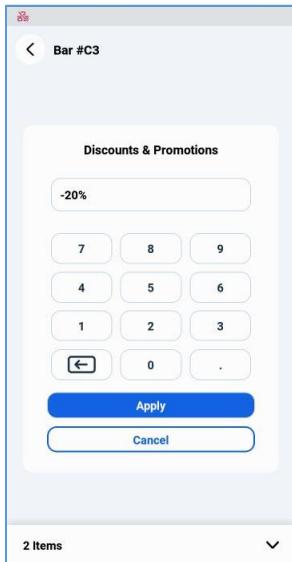
You can review the customer's information, or if necessary you can add to or edit the customer's information.

Discounts

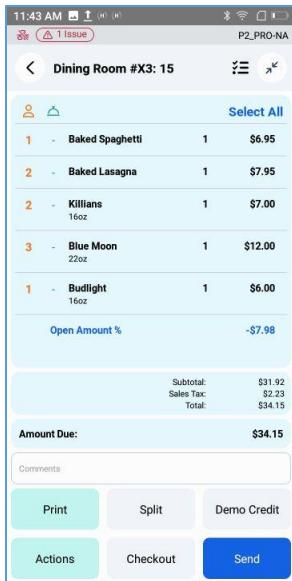
In the **Actions** submenu, if you tap **Discounts**, the POS will display the Discounts & Promotions screen, which lists all discounts and promotions that can be applied to the ticket.



If you tap a discount option, the POS displays a keypad, enabling you to change the default amount of the discount.

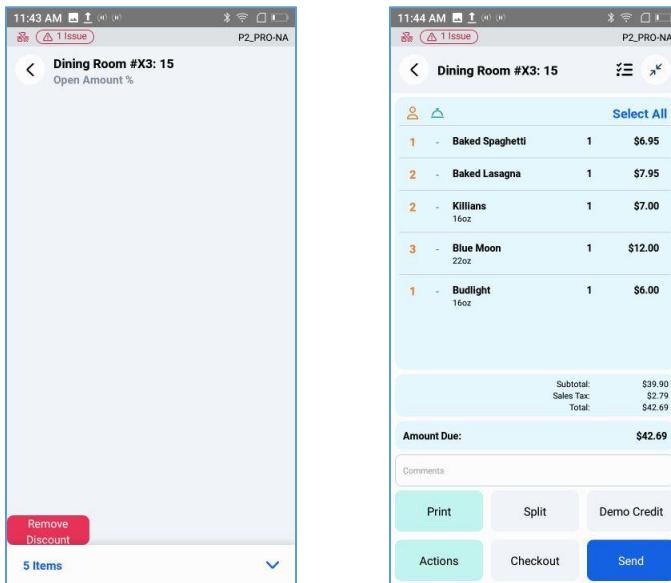


You can also add a description of the discount by entering the details in the **Description** box. Tap **Apply** to add the discount to the ticket. After you tap **Apply**, the POS displays the discount as a new item in the ticket and adjusts the ticket's totals appropriately.



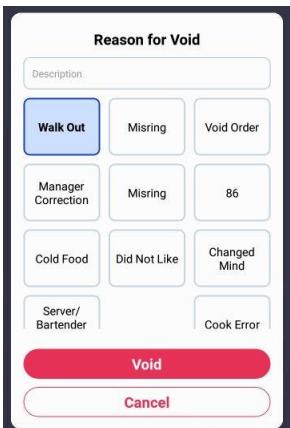
The POS displays the discount with blue text, like a menu item that has not yet been sent to the printer. To apply the discount to the ticket, tap **Send**.

Later, if you need to remove the discount, tap the discount in the Ticket screen, then tap **Remove Discount**.



Void Order

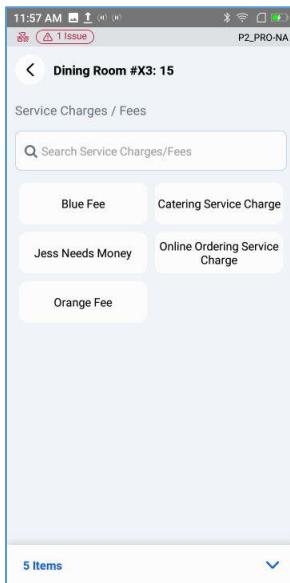
The **Void Order** action enables you to void an entire ticket. In the **Actions** submenu, if you tap **Void Order**, the POS will display the Reason for Void panel, which lists all predefined void reasons that can be applied to the ticket. You can also add a description of the void reason by entering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



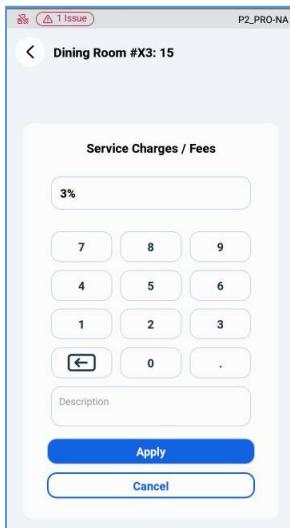
To void the ticket, tap an appropriate void reason, then tap **Void**. The POS will void the ticket and display the room's Ticket screen, with the voided ticket's table or tab icon now displaying as available.

Service Charges/Fees

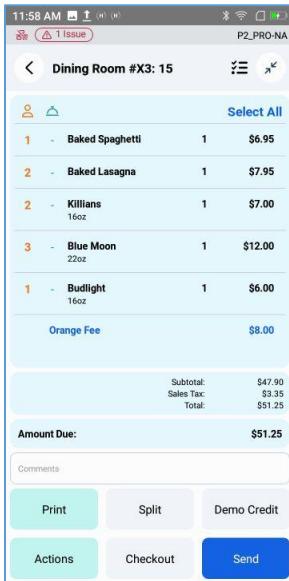
In the **Actions** submenu, if you tap **Service Charges/Fees**, the POS displays the Service Charges/Fees screen, which lists all charges that can be applied to the ticket.



If you tap a charge option, the POS displays a keypad, enabling you to change the default amount of the charge.

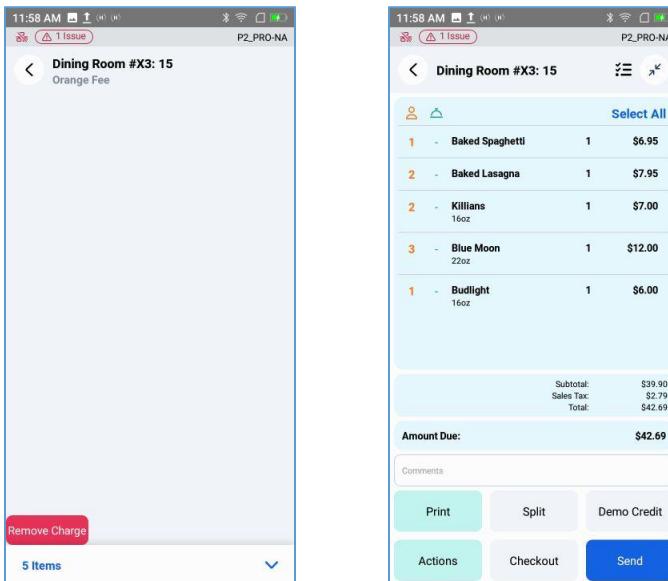


You can also add a description of the charge by entering the details in the **Description** box. Tap **Apply** to add the charge to the ticket. After you tap **Apply**, the POS displays the charge as a new item in the ticket and adjusts the ticket's totals appropriately.



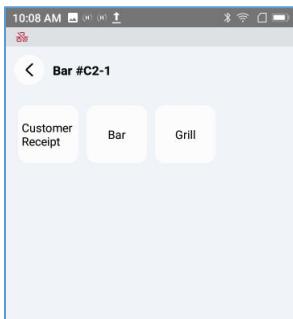
The POS displays the charge with blue text, like a menu item that has not yet been sent to the printer. To apply the charge to the ticket, tap **Send**.

Later, if you need to remove the charge, tap the charge in the Ticket screen, then tap **Void Charge**, then tap **Send**.

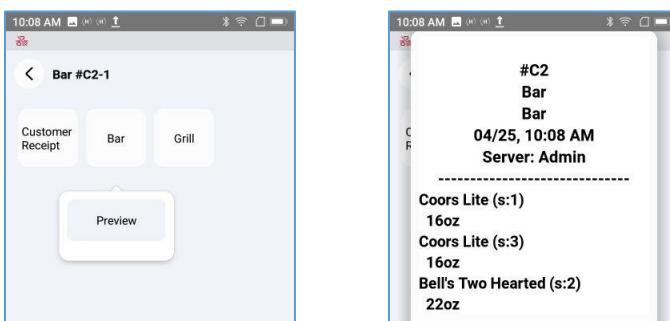


Reprint

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.

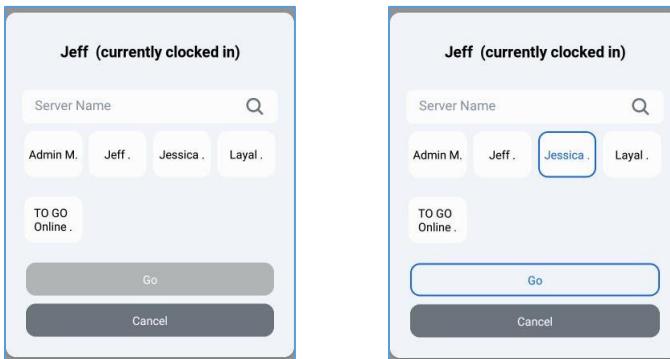


If you tap a printer button, the POS will send the ticket to the selected printer. If you press and hold a printer's button, the POS will display the **Preview** option. If you then tap **Preview**, the POS displays a print preview of the ticket.



Change Server

The **Change Server** action enables you to assign the ticket to a different server. In the Actions submenu, if you tap **Change Server**, the POS displays a panel that includes the **Server Name** box, as well as buttons representing any servers that are currently clocked in.



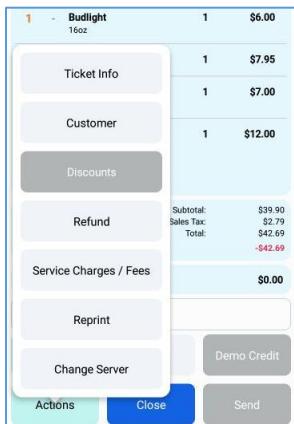
To assign the ticket to a new server, select an appropriate servers button, then tap **Go**. If you do not see a button representing the server you want to select, type the server's name in the **Server Name** box. If that server is clocked in, the POS will display the server as an option. Select the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

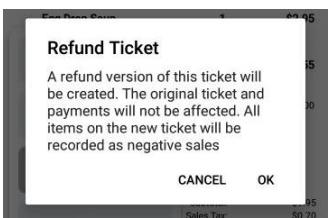


Refund

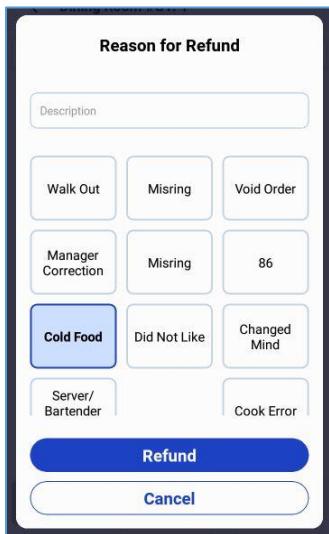
After you pay a ticket, the POS will include **Refund** as an action option. The Refund action enables you to refund the full amount of a ticket back to a customer, with various payment methods.



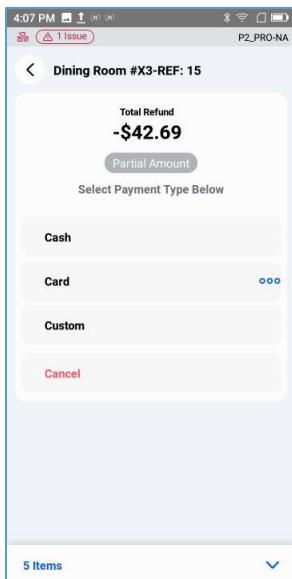
If you tap **Refund**, the POS displays a Refund Ticket prompt, describing how the POS will process the refund (by creating a refund version of the original ticket). Tap **OK** to continue.



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**.



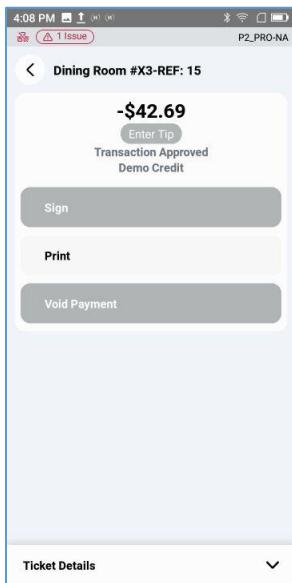
The POS will then display a screen displaying the total refund amount and a list of payment options. In this screen, you may select an appropriate payment type to use for the refund.



If necessary, you can tap **Enter Amount** to edit the default amount of the refund. 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**.

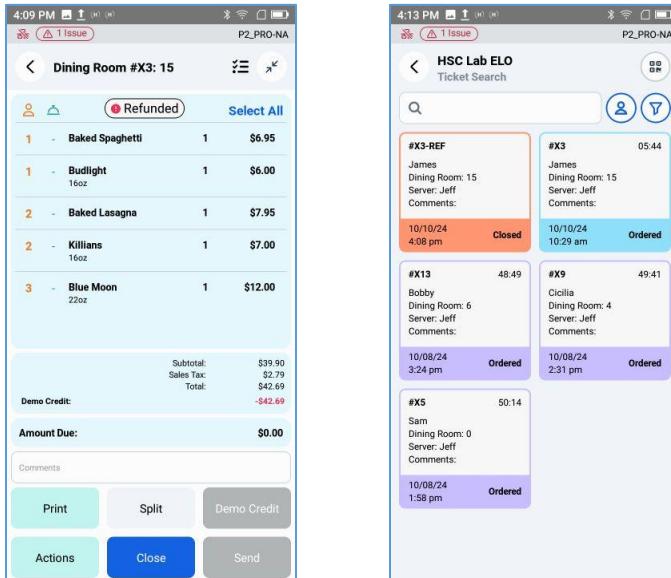
If you tap **Custom**, the POS will display a panel listing the location's custom tenders as payment options. If you tap **Cancel**, the POS will cancel the Refund transaction and return to the Ticket screen.

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



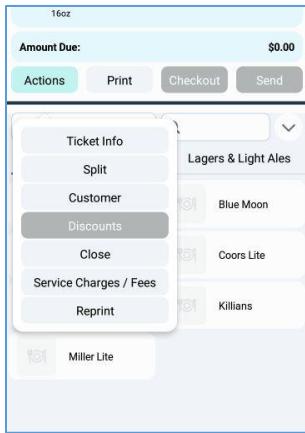
If the transaction requires a customer's signature, you can tap **Sign** to access the signature panel, allowing the customer to add a signature. If you tap **Print**, the POS will prompt you to either preview the ticket or send it to a receipt printer. If the refund's payment type supports the option,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

If you access the ticket after performing a refund, the POS will display a **Refunded** banner in red text. In the Room screen, the POS will display the ticket as closed, its tile highlighted in orange.



Close

To remove a paid ticket from the Room screen, access the ticket. In the Ticket screen's **Actions** menu, tap **Close**.



When you tap **Close**, the POS closes the ticket and removes it from the displayed tickets in the Room screen.

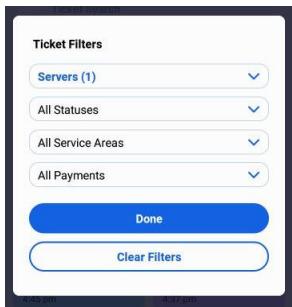
Ticket Search

In the Tickets screen, if you tap , the POS will access the Ticket Search screen, which features various controls to enable you to search for a ticket, regardless of its status.



The Ticket Search screen lists the location's most recent tickets. If you tap , the POS will filter the list to only include tickets associated with the server currently accessing the screen.

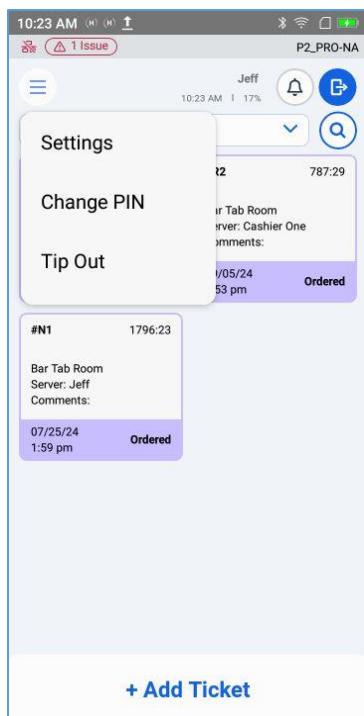
If you tap , the POS will display the Ticket Filters panel, which features controls that enable you to filter the list of tickets by one or more servers, ticket statuses, service areas, or payment types.



To apply a filter to the ticket list, select one or more search criteria in these lists, then tap **Done**. To clear all current filters, tap **Clear Filters**.

Settings Menu

To access the **Settings** menu, tap the **Options** button  in the POS Rooms screen, then tap **Settings**.

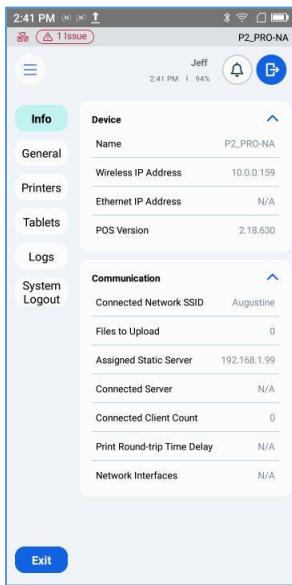


The **Settings** menu includes the following screens:

- ▶ Info
- ▶ General
- ▶ Printers
- ▶ Tablets
- ▶ Logs
- ▶ System Logout

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.

Location: A list of features specific to the location, with flags indicating if each feature is or is not enabled at this location.

Rooms: A list of the rooms accessible to this POS. If you tap a room in this list, the POS displays a sublist of room-specific features, with flags indicating if each feature is or is not enabled in the room.

Job Types: A list of the job types available to this POS. If you tap a job type in this list, the POS displays a sublist of features specific to the job type, with flags indicating if each feature is or is not enabled for the job type.

Permissions: A list of staff members who can log in with this POS device. If you tap a staff member in this list, the POS displays a sublist of functions, with flags indicating if the staff member has permission to use each function.

Adjustments & Discounts: A list of adjustments and discounts available to tickets opened in this POS device. If you tap an adjustment or discount in this list, the POS displays a sublist of its details, such as its default amount and service charge.

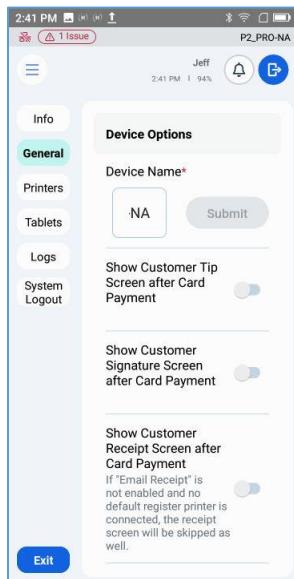
Menu Groups: A list of menu groups available for order in this POS. If you tap a menu group in this list, the POS displays the schedules when the menu group is available.

Menu Items: A list of menu items available for order in this POS. If you tap a menu item in this list, the POS displays a sublist of its details, such as its tax status, kitchen group, associated tags, and size options.

Pricing: A list of pricing rules that are active and applicable to tickets opened with this POS. If you tap a pricing rule in this list, the POS displays a sublist of its details, such as its current status, its short identifier, and its tags.

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: To set a name for the device, enter the name in the **Device Name** box, then tap **Submit**.

Show Customer Tip Screen After Card Payment: If you enable this switch, the POS will prompt customers to select a tip amount after they enter a credit card payment.

Show Customer Signature Screen After Card Payment: If you enable this switch, the POS will prompt customers to enter a signature in the Customer Signature screen after they enter a credit card payment.

Show Customer Receipt Screen After Card Payment: If you enable this switch, the POS will display the Receipt screen after they enter a credit card payment.

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

Table Layout View

The **Table Layout View** section includes controls that enable you to select either **Map View** or **List View** as the default view mode when you access a room with a table layout. If you want the POS to automatically open rooms with table layouts in Map View by default, tap **Map View**, then tap **Exit**. If you want the POS to automatically open rooms with table layouts in List View, tap **List View**, then tap **Exit**. (By default, the POS uses the **Map View** mode when you access a room with a table layout.)

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

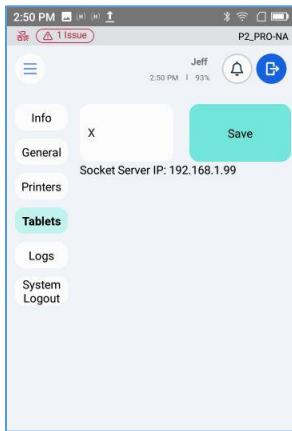
Printers Screen

The Printers screen, which enables you to configure the POS on each ELO 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.



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).

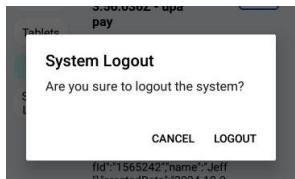


In the **Tablets** screen, you can set or edit the ticket prefix by entering a string of one to four alphanumeric characters in the **Ticket Prefix** box, then tap **Save**.

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.

System Logout

If you tap **System Logout**, the POS will prompt you to verify that you want to log out of the POS app. If you tap **Logout**, the POS will log out.

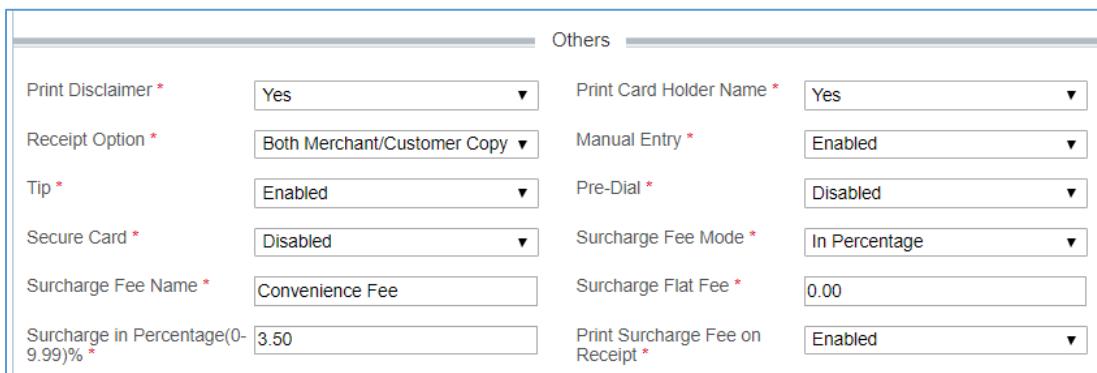


Configuration for Credit Surcharges

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
Receipt Option *	Both Merchant/Customer Copy
Tip *	Enabled
Secure Card *	Disabled
Surcharge Fee Name *	Convenience Fee
Surcharge in Percentage(0-9.99)% *	3.50
Print Card Holder Name *	Yes
Manual Entry *	Enabled
Pre-Dial *	Disabled
Surcharge Fee Mode *	In Percentage
Surcharge Flat Fee *	0.00
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 Log into the Admin Console.
- 1 In the Main Menu, click **Location Setup**, then click **Payment Gateway**.
- 2 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.

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

The screenshot shows the 'In-Store Settings' tab selected in the top navigation bar. Below it, the 'Gateway' dropdown is set to 'None'. The 'EMV Solution' dropdown is set to 'PAX'. The 'PAX Interface' dropdown is set to 'Heartland SDK'. Under 'Portico Direct', there is a checkbox labeled 'If processing with Heartland, tips, voids and refunds may be performed more rapidly by going direct to Portico.' which is unchecked.

- 4 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**.

The screenshot shows the 'Display' tab selected in the top navigation bar. Under 'Top Margin' and 'Bottom Margin', both are set to '1'. Under 'Hide Separator Lines', the checkbox 'Remove the dashed lines between modifiers on receipts.' is checked. Under 'Show Promise Time', the checkbox 'Show the promise time on delivery receipts.' is unchecked. Under 'Show Surcharge Clause', the checkbox 'Show a clause informing the customer of a ticket's potential credit card surcharge fee.' is checked.

- 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.



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.



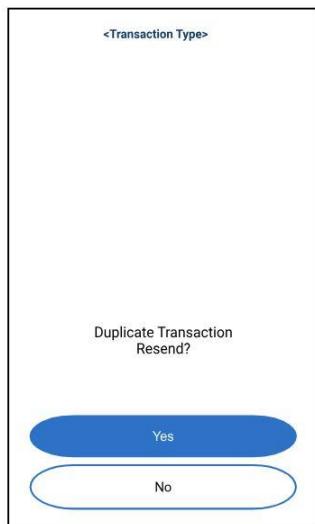
Processing Duplicate Transactions

When the processor receives a request to approve a credit card transaction, it does not process the transaction until verifying that it is not a duplicate of an earlier transaction. By default, the processor will not process duplicate transactions of the following types:

- ▶ Credit Card Sales
- ▶ Preauthorizations
- ▶ Refunds
- ▶ Phone Orders
- ▶ Force Sales

When the processor receives a transaction, it determines if that transaction is a duplicate by reviewing its transaction type, its primary account number (PAN), and its transaction number.

If the processor identifies a duplicate transaction, the POS displays an alert and prompts you to either resend or dismiss the transaction.



If you tap **Yes**, the POS resends the transaction to the processor, who will then receive and process it. Once the transaction is approved, the POS adds it to the day's credit card batch.

If you tap **No**, or if the POS times out, the transaction is designated as "declined."

This procedure is *not* used for store-and-forward transactions.

Troubleshooting

The Mobile 2.0 device is displaying the “End of Day” screen.

- 1 Swipe up on the device and tap .
- 2 Tap the **Restaurant** tile.

The Restaurant app will display in the foreground.

The POS is unable to take a payment.

Verify that the Payments and PA apps are both running in the background.

Verify that the device is connected to the location’s Wi-Fi network.

Verify that the device’s battery is at least 10% charged. If its battery drops below 10%, the Payments app will not function.

Restaurant App displays a red icon in the POS.

If Restaurant displays this icon in the top panel of the POS, the device is not connected to the Dedicated Socket Server.



To fix this, verify that the device is connected to the same Wi-Fi network as the Dedicated Socket Server.

Also verify that the Dedicated Socket Server is on the Restaurant app and connected to the same network as the Mobile 2.0 devices.

HPOS is not updating to the latest JS Version

- 1 Swipe up from the bottom of the screen, then tap .
- 2 Swipe the **Restaurant** tile up to close it.
- 3 Tap .
- 4 Swipe up from the bottom of the screen.
- 5 In the Apps screen, tap the **Restaurant** icon.

This will initiate a JS Version check and update.

If the device displays a blank white screen, the app is checking and attempting to install the latest version. Verify that the device is also connected to the location's Wi-Fi network.

Note: Versions 2.16 and later will not include JS versions, only APK versions, and the app will display "Refresh App" where the JS version numbers used to display.

Network Unplugged/Terminal IP No Connection Error or Download Error Terminal Code: 300 Cannot Connect

This error indicates that the device is not connected to the network, or it may be an error generated when Downloader tries to download a new update.

Verify that the device is connected to the network and try the download again. If the device connected to the correct network and you still see this error, do the following:

- 1 Swipe down from the top of the screen, then tap the **Settings** icon.



- 2 In the **Password** box, enter "Global99".
- 3 In the Settings screen, tap **Wi-Fi**.
- 4 Tap and hold the network that the device is currently connected.
- 5 Tap **Forget Network**.
- 6 Reboot the device, access the Settings screen, and connect to the network again.
- 7 Run the Downloader app again.

D2 RETRY LATER - The transaction cannot be completed at this time. Retry later.

This is a card issuer response. The card issuer is the bank or credit card company associated with the card. In such cases, ask the customer should try a different card.

Keys Not Injected

This will require the device to be sent back to the hardware team to reinject. Otherwise, it is inoperable until the keys are reinjected.