

# Heartland

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# Restaurant

Mobile 2.0 Setup Guide

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Date	Version	Author	Summary
11/08/2024	1.0	JWD	Original document introduced, with content taken from earlier version of "Mobile 2.0 User Guide".

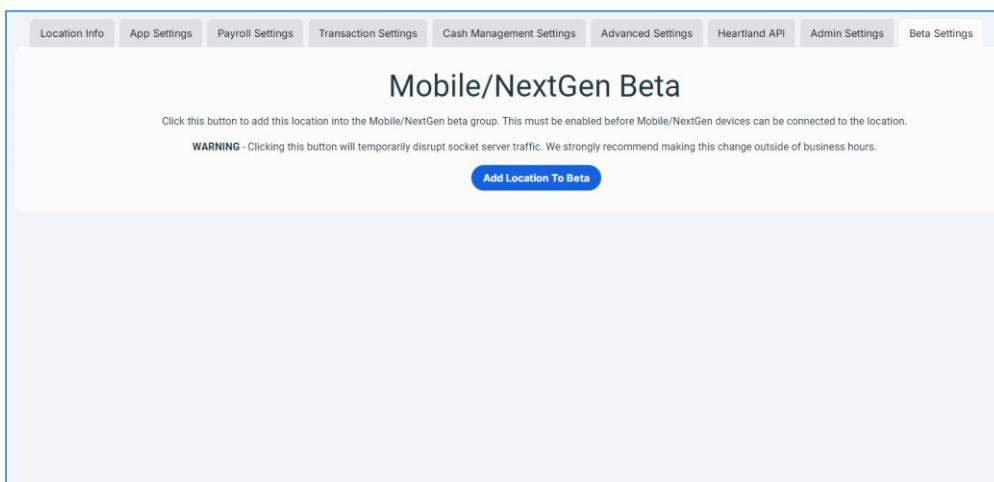
# Overview

This article describes how to configure a Heartland Restaurant location to use Heartland Restaurant's Mobile 2.0 POS payment device. It includes procedures for configuring the Mobile 2.0 POS payment device and various card readers and printers.

## Enabling a Location to Use Mobile 2.0

Before a location can use the Mobile 2.0 device, 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**.



- 5 Click **Save** to save your settings, then click **Publish Changes**.



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

# Configuring Mobile 2.0

## Powering Up the Device

Press and hold the Power button (on the left side of the device) for about five seconds, or until it displays the orange logo on its screen.

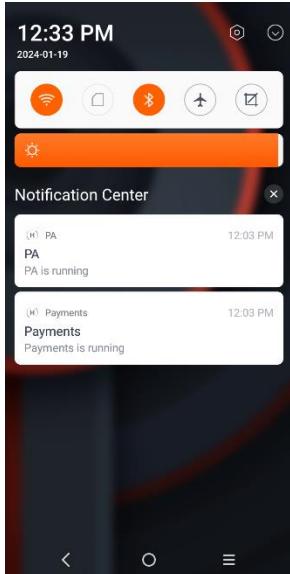
Once the device powers up, it will display its lock screen. Shortly thereafter, the PA and Payments apps will automatically run and open.

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

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

**Note:** Mobile 2.0 devices do not support WPA3 security standard. When connecting a Mobile 2.0 device to a location's Wi-Fi network, use either the WEP or WPA2 security standards.

- 1 To unlock the device, swipe down from the top of the screen.



- 2 Tap the **Settings** icon.



- 3 In the **Please enter password** box, enter "Global99".
- 4 In the Settings screen, tap **Wi-Fi**.
- 5 In the Wi-Fi screen, select the network that the device will use.

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

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

## Updating All Required Applications

### Close All Running Apps

- 1 Swipe up from the bottom of the screen.
- 2 Tap .

The device will display all apps currently running as tiles.

- 3 Tap .

The device will close all running apps.

### Update Using the Downloader App

Before running Restaurant and its supporting apps, you must update them to the latest firmware version. To do this, you can use the Downloader app.

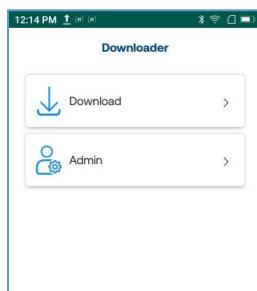
Downloader is a utility app that manages the installation and updates of the Restaurant, PA, and Payment apps. When you first run a Mobile 2.0 device, Downloader automatically installs the Restaurant, PA, and Payment apps. After this initial installation, you must use Downloader to install updates manually.

**Note:** Never delete the Downloader app from any Mobile 2.0 device. Without it, the device will be inoperable.

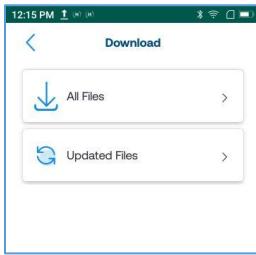
- 1 Swipe up from the bottom of the screen.
- 2 In the Apps screen, tap **Downloader**.

The Downloader app runs.

- 3 In the Downloader screen, tap **Download**.

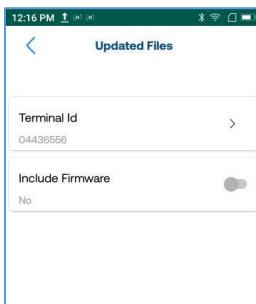


- 4 In the Download screen, tap **Updated Files**.



**Note:** Do not select **All Files**. If you install all files on a device in which the apps are already installed, it may corrupt the apps and render them inoperable.

- 5 In the Updated Files screen, confirm the Terminal ID number is correct.



The Terminal ID number is printed on a yellow sticker on the back of the device. Do not enable the **Include Firmware** switch.

- 6 Tap **Continue**.

Downloader will check for any new firmware updates for the Restaurant, PA, and Payments apps. If it finds any, it will download and install them.

**Note:** This process can take many minutes to complete.

## Running All Required Applications

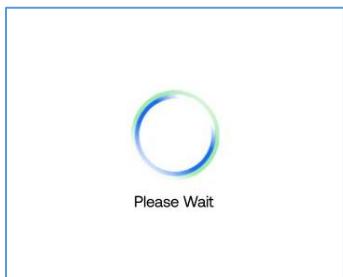
After updating the required apps, you can run them. For the POS to perform properly, you must run its supporting apps (Payments and PA) before running the Restaurant app.

### Run the Payments and PA Apps

- 1 Swipe up from the bottom of the screen.
- 2 In the Apps screen, tap **Payments**.

Once the Payments app runs, the PA app will also run automatically. When the Payments app displays the blue and green “running” graphic (“Please Wait”), it is ready to use.

**Note:** The “Please Wait” label is not an instruction to the user. It indicates that the Payments app is waiting to receive a transaction to process. You may proceed after it displays.



If this is the first time the app has run, it may display one or more prompts. If so, tap **Allow** for all such prompts.

## Run the Restaurant App

1 Swipe up from the bottom of the screen.

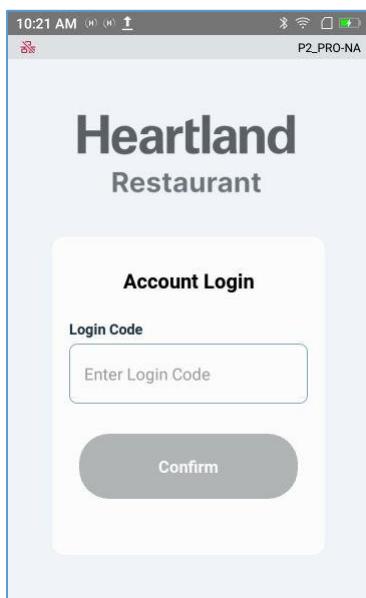
2 Tap .

Leave the Payments and PA apps running in the background.

3 Swipe up from the bottom of the screen again.

4 In the Apps screen, tap **Restaurant**.

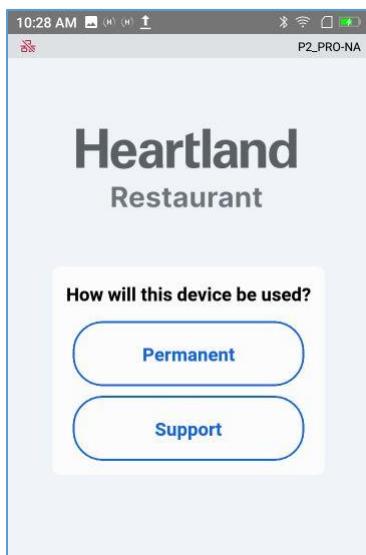
The Restaurant POS app will display a prompt for a Device Login Code.



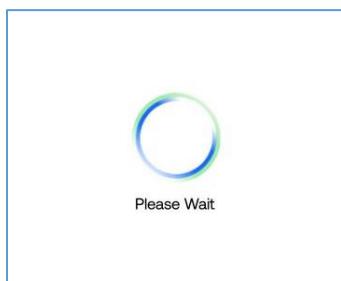
5 Enter a valid Device Login Code, then tap **Confirm**.

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.



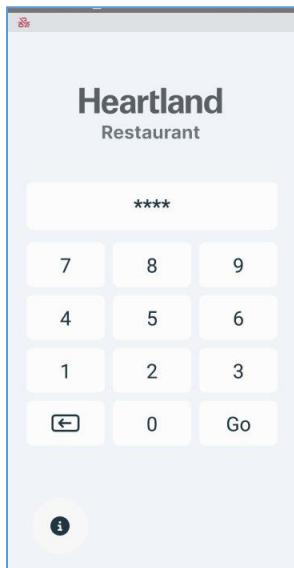
- 6 Swipe up from the bottom of the screen, tap , then tap .
- 7 Once all apps are closed, run the Payments app first and then wait until it displays the blue and green “running” graphic (“Please Wait”).



**Note:** The “Please Wait” label is not an instruction to the user. It indicates that the Payments app is waiting to receive a transaction to process. You may proceed after it displays.

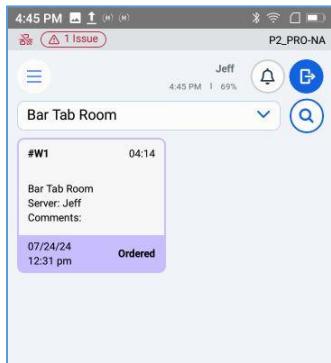
- 8 Swipe up, tap , swipe up again, then tap the **Restaurant** icon.

The Restaurant app will run again and display its PIN screen.

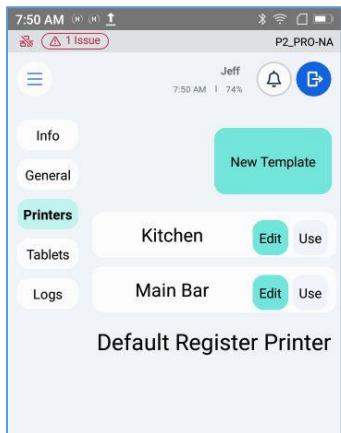


## Setting a Printer Template for the Device

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



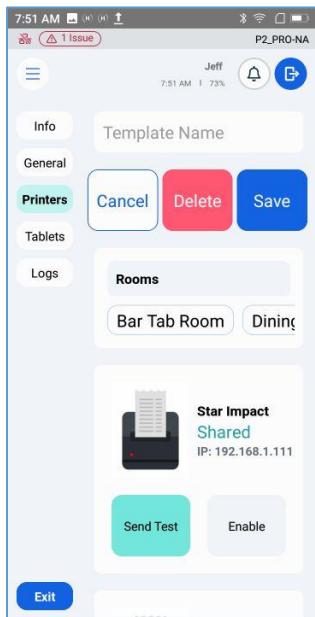
- 2 Tap .
- 3 Tap **Manager**, then tap **Printers**.



4 In the Printers screen, click **Use** next to a pre-existing printer template.

OR Click **New Template** and follow the steps below.

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



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

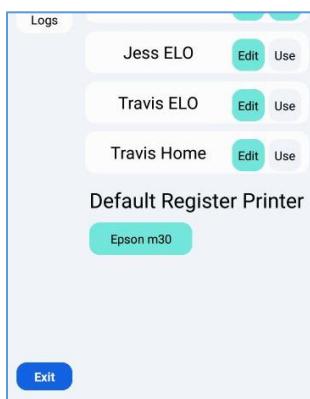


7 Scroll down and review the available printers.

- 8 For each printer that this device will use, tap **Enable** in the printer's tile.
- 9 For each printer you enable, in its **Default printer for formats** area, select the display formats that will use this as their default printer.
- 10 For each printer you enable, in its **Backup printer for formats** area, select the display formats that will use this printer as their backup if the 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 Select **Use** next to the template that was created.
- 14 If you would like to set a default register printer for receipts, select it under **Default Register Printer**.

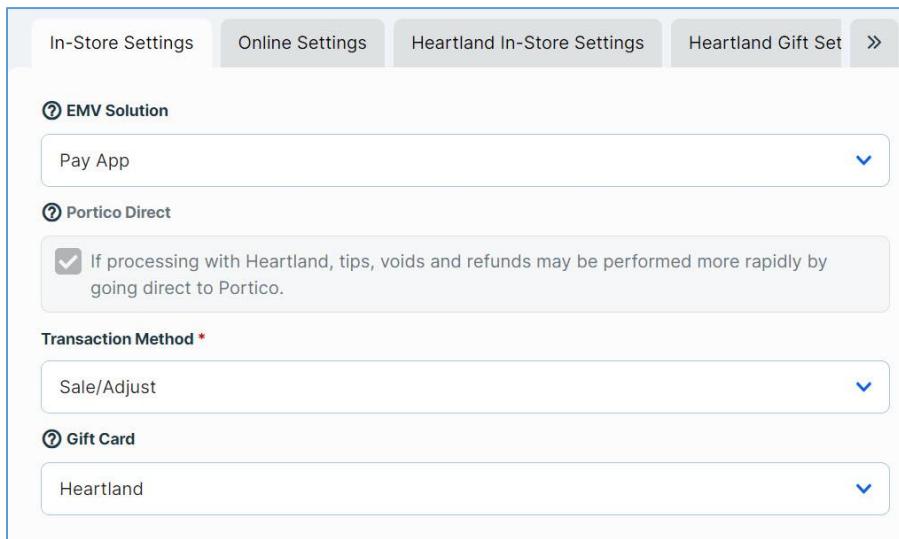


- 15 Tap **Exit** to return to the Ticket screen.

# Configuration for Gift Card

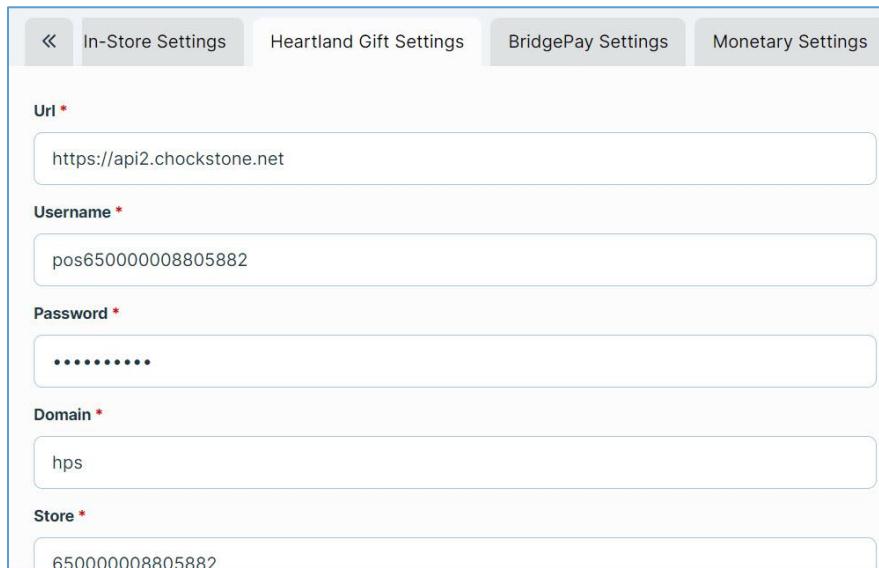
If the location offers gift card service, you must configure the location to process gift card transactions in Heartland's Admin Console.

- 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 top navigation bar. The 'Gift Card' dropdown menu is open, displaying 'Heartland' as the chosen option. Other options in the dropdown include 'Pay App' and 'Portico Direct'. There is also a note about processing with Heartland for tips, voids, and refunds.

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



The screenshot shows the 'In-Store Settings' tab selected in the top navigation bar. Below are the configuration fields:

- Url \***: https://api2.chockstone.net
- Username \***: pos650000008805882
- Password \***: ..... (redacted)
- Domain \***: hps
- Store \***: 650000008805882

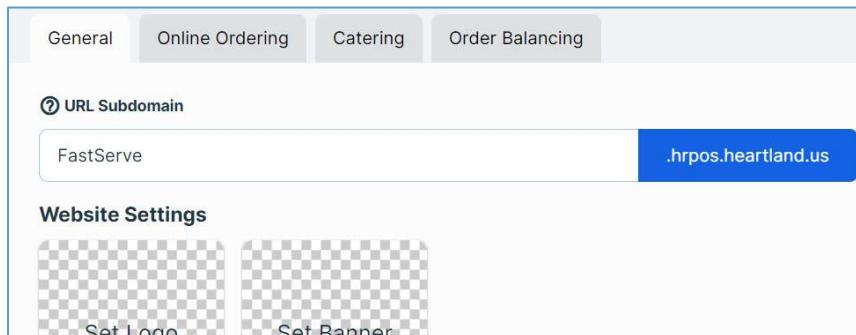
- 6 Click **Save** to save your settings.

## 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.



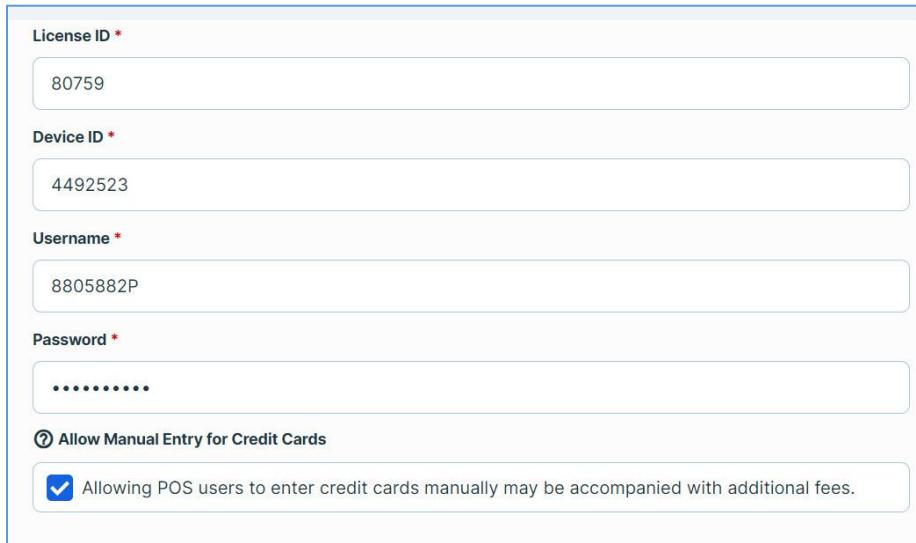
The screenshot shows the 'General' tab selected in the 'Online Ordering' screen. The 'URL Subdomain' field contains 'FastServe' and '.hrpos.heartland.us'.

**Website Settings**

Set Logo Set Banner

- 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.

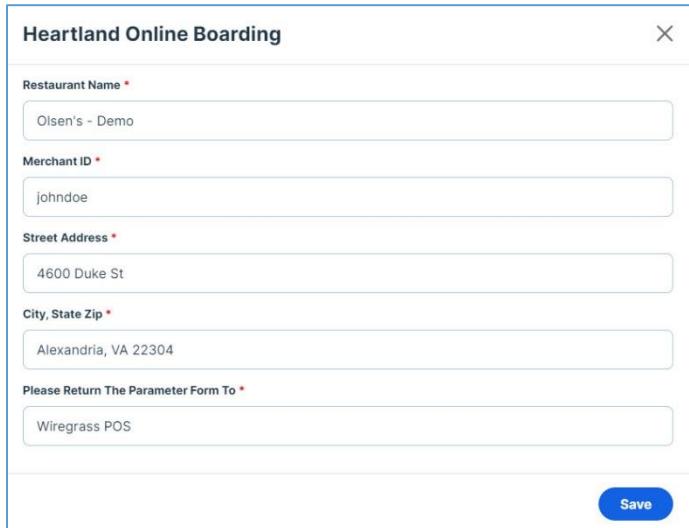


The form contains the following fields:

- License ID \*: 80759
- Device ID \*: 4492523
- Username \*: 8805882P
- Password \*: (redacted)
- 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.



The panel contains the following fields:

- 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** button

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 POS setup interface. The tab bar includes 'In-Store Settings', 'Online Settings' (selected), 'Heartland In-Store Settings', 'Heartland Gift Set', and a 'More' icon. The 'Online Settings' tab contains the following fields:

- Gateway \***: A dropdown menu showing 'Heartland/Portico'.
- Transaction Method**: A dropdown menu showing 'Sale/Adjust'.
- Public Key \***: An empty text input field.
- Online Device ID \***: An empty text input field.

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

## Conclusion

You have completed the setup process, and the location's staff can now use run and use the POS on the Mobile 2.0 device.

For a comprehensive description of the screens and controls in the POS, please review the ["Mobile 2.0 User Guide"](#).