# Heartland

## Restaurant

Admin Console Setup Guide

# Table of Contents

| Date | Product Version | Author | Summary |
|------|-----------------|--------|---------|
| 05/20/2020 | 5.40 | BB | Original document introduced. |
| 04/29/2021 | 6.35 | JD | Style template updated. Language Switcher added. |

# Overview

Heartland Restaurant is a cloud-based POS platform designed specifically for restaurant environments including fine dining, casual dining, and quick serve. This document is intended to provide detailed instructions for the Administration section. It includes a variety of topics including:

- ‣ Location Setup
- ‣ Account Menu
- ‣ Loyalty Setup
- ‣ Reports

# Location Setup

The Location Setup menu contains various settings that control what features are available in the site and how the POS and other apps perform.

## Settings

The **Settings** screen includes many controls that enable you to configure various assorted functions and features of the POS and other Heartland Restaurant apps and services.

### Location Info

**Set Logo**: In this box, you can select a graphic to represent the logo for the site. The POS and other apps will display this logo in the Log In and various other screens.

**Location Number**: In this box, enter the site's unique location number.

**Reseller**: In this box, enter the name of the site's reseller.

**Location Name**: In this box, enter the name of the location.

**Language**:

**Address**: In this box, enter the site's street address.

**City**: In this box, enter the site's city.

**State**: In this box, enter the site's state.

**ZIP**: In this box, enter the site's ZIP code.

**Time Zone**: In this list, select the site's time zone.

**Daylight Savings Time**: If you select this check box, the system will adjust the site's time setting to honor daylight savings time.

**Phone**: In this box, enter the site's telephone number.

**Support Phone**: In this box, enter the telephone number of the site's support department.

**Support Email**: In this box, enter the email address of the site's support department.

**Email Reply to Address**: In this box, enter the email address that will receive reply emails from customers.

**Reporting Start Date**: If you click this box, the program displays a calendar, enabling you to select a date. If you select a date, the program will use it as the start date for sales data that the program will use in its reports.

**Use Mock Report Data**: If you select this check box, the program will use mock data when generating reports. You can use this feature when performing demos for prospective clients or staff training.

# Payroll Settings

The **Payroll Settings** area includes controls that enable you to define the beginning of the site's standard work week and the range for daily and weekly overtime pay rates.

**Work Week Start Day**: In this list, you can select the day of the week that the program will use it as the recurring start day of the work week in the site's payroll calculations.

**Weekly Hours Before Overtime Begins**: In this box, enter the number of minutes staff members must work within a single week before earning their overtime pay rate.

**Daily Hours Before Overtime Begins**: In this box, enter the number of hours staff members must work within a single day before earning their overtime pay rate.

# Transaction Settings

The **Transaction Settings** area includes controls that enable you to include or exclude various features when performing transactions in the POS app.

**Split Checks**: If you select this check box, the POS app will include controls that enable servers to split a check into two checks, for multiple customers.

**Signature Capture**: If you select this check box, the POS will include controls that enable servers to access the Signature Capture panel in the Payment screen. This panel enables customers to provide a signature directly on the screen of the device, to validate payments made with credit cards or house accounts.

**Email Receipts**: If you select this check box, the POS will include an email option in the Payment screen. If a customer selects this option, the POS will send an electric copy of the receipt to the customer via email.

**Offline Transactions**: If you select this check box, the POS will accept payments with credit cards, even when the network is offline. Later, when the network restores its connection with the processor, the POS will authorize all credit card payments made while it was offline.

**Checkout Bulk Tips**: If you select this check box, the POS will apply a tip amount of "0.00" to all checks that have no tip amount when the server clocks out of the app.

**Round Up Taxes**: If you select this check box, checks with tax totals that include a fraction of a cent will be rounded up to the nearest whole cent.

**Credit Card Tabs**: If you select this check box, the POS will open a new tab automatically when you swipe a credit card while viewing the Ticket Information screen.

**Credit Card Drawer Pop**: If you select this check box, the POS will open the attached cash drawer when you pay a check with a credit card. By enabling this option, you can allow servers to claim a tip or deposit a receipt immediately after paying a check. (Any cash added or withdrawn cannot be tracked by the program.)

**Credit Card Signature Minimum**: In this box, you can set a minimum amount for a check to require a signature. The POS will only print signature lines on the authorization slip or prompt for a signature capture if the check's amount is higher than the amount you set in this box.

**Refunds**: If you select this check box, the POS will include controls that enable servers to perform refunds for checks paid with cash or credit cards.

**Allow Zero Tip Suggestion**: If you select this check box, the POS will display the **No Tip** button along with the other tip option buttons in the Complete Your Order screen. If you enable this feature, the **No Tip** button will also be available in the Online Ordering, Kiosk, and other apps.

**eGift QR Code**: If you select this check box, the POS will send emails of newly purchased gift cards to customers, and each email will include a QR code version of the card number along with the printed card number. Later, when a customer uses the gift card to pay a check at the POS, Kiosk, or in the Guest app, they can scan the QR code instead of manually typing in the gift card number.

## App Settings

The **App Settings** area includes controls that enable you to make various settings that effect the performance of the POS app.

**End of Day**: In this list, select the hour that represents the end of the location's business day.

**Preferred Wi-Fi Network**: In this box, type the name of the site's Wi-Fi network. This should be the name of the Wi-Fi network that the site's POS devices will connect to.

**Screensaver Delay**: In this list, you can select the amount of time that the POS sits idle before running the screensaver.

**Seat++**: This control allows you to make the Seat++ feature available in the POS. Seat++ automatically increments the numbers of seats when a server adds order to a ticket.

If you select **Enabled with default**, the POS will automatically assign seat number "1" to the first items you add to the ticket by default. Each time you tap **Seat**, the POS will increment the seat number by one and apply it to the next items you order.

If you select **Enabled, no default**, the POS will not assign a seat number to any ordered items until you tap the **Seat** button. If you tap **Seat**, it will assign seat number "1" to the next items you add to the ticket, and then increment the seat number by one each time you tap the **Seat** button.

If you select **Disabled** in the list, the POS will not apply seat numbers automatically to ordered items.

**Seat Behavior**: If you set the site to use the Seat++ feature, you can use this control to set how the POS will begin incrementing seat numbers reopen a ticket. If you select **First Available Number**, the POS will use the number that follows the last used seat number and begin incrementing from there. For example, after tapping **Seat++**, if the last used seat number in the ticket was "4", the POS will assign the next ordered item to seat number "5". If you select **Always Increment**, the POS will restart the seat number series (starting with "1") each time you reopen the ticket. This feature may be useful in environments where servers order items in rounds.

**Caller ID**: You should select this check box to enable the site to use the Caller ID service on the location's network.

**Send Exits Ticket**: If you select this check box, the POS will exit a check when you tap **Send** and access the main room screen.

**Room Level Taxes**: If you select this check box, the program will allow you to set up a tax that the POS will apply to sales made within a specific room. You can set the POS to apply the room tax and override any other taxes applied "globally".

**User Cards**: If you select this check box, staff members will be able to use ID cards to log into the POS. Also, managers can swipe an ID card to authorize an action that requires a manager's permission.

**Quick Receipt**: If you select this check box, the POS will include an option for sending a new order and printing the customer receipt immediately.

**Labor Scheduling**: The POS will only allow staff members to clock in within the days and times set in the labor shifts defined in the Scheduled Shifts screen. By setting the POS to enforce the labor schedules defined in the Scheduled Shifts screen, you can prevent staff members from clocking in at unscheduled times.

**Early Clock In (in minutes)**: If you set the POS to enforce labor schedules, you can use this box to set the POS to allow staff members to clock in early within a set number of minutes. For instance, if enter "5" in this box, the PS will allow staff members to clock in up to five minutes (but no earlier) before the scheduled shift begins.

**Require Checkout Before Clockout**: If you select this check box, the POS will prompt servers to perform a checkout before allowing them to clock out.

**Time Punch Prints**: If you select this check box, the POS will print a time punch summary slip each time a staff member clocks in or clocks out.

**Inline Context Items**: If you select this check box, the POS will display context items above their associated ingredient items. If you clear this check box, the POS will display context items below their ingredient items.

**Ticket Item Sorting**: This list enables you to set the POS to sort menu items printed on tickets and customer receipts. If you select **Seat/Course**, the POS will sort menu items by seat number and menu course. If you select **None**, the POS will list items in the order in which they were added to the check.

**Allow Unshared Kitchen Prints**: If you select this check box, the POS will route kitchen slips to printers that are not shared. This feature works best if each POS has a dedicated printer.

**Allow Shared Printing Without Sockets**: If you select this check box, POS devices will continue sending print jobs to local printers during periods when sockets are down.

**Future Orders**: If you select this check box, the apps will allow servers to place orders and hold them until a specific time and date in the future.

**Kitchen Slip Hold Header**: In this box, you can enter the text of a header. The POS will use this text as the header on kitchen slips for held orders instead of the default header ("HOLD").

**Sort Subitems as Ingredients**: If you select this check box, the POS will group and list subitems and ingredients together and display them below the main menu item that includes them.



**Tax Sub Items Separately**: If you select this check box, the POS will apply taxes to sub items based on their own tax categories, instead of taxing them based on the categories of their main items.

**Report Sub Item Sales**: If you select this check box, the program will list totals for net and gross sales of sub items in sales reports separated from their main items. If you clear this check

box, the program will roll up the sales totals from sub items into the net and gross sales totals of main items.

**Enable Timed Item Holds:** This feature enables servers to order an item and then hold the item for a set number of minutes. The POS then waits for that period of time to expire before sending the order to the kitchen and printing its kitchen slip.

To enable this feature, you must set a tablet to server as a dedicated socket server. In the Admin Console main menu, under Location Setup, click **Authorized Tablets**. In the Authorized Tablets screen, click **Set Dedicated Socket Server**. In the Dedicated Socket Server IP Address window, select the device that will run the POS and use the timed holds feature in the **Dedicated Socket Server Tablet** list. When you select the table, the program should display its

IP address in the **Dedicated Socket Server IP Address** box. Click .

To use timed holds, the device running the POS app must either be the dedicated socket server or connected to the dedicated socket server. In the POS log in screen, you can check the connection status of the device by tapping in the top panel.

Now you can enable the timed item holds feature. In the main menu, under Location Setup, click **Settings**. In the **App Settings** area, select the **Enable Timed Item Holds** check box. The program will display the **Timed Item Hold Presets in Minutes** box. In this box, you can enter a common number of minutes for a hold time duration, such as 5. If you enter a preset, another **Timed Item Hold Presets in Minutes** box, enabling you to enter multiple timed hold presets, such as 10, 15, and so on. Later, when servers use the timed item hold function, the POS will display these presets as options

# Cash Management Settings

The **Cash Management Settings** area includes controls that determine how the POS behaves and manages cash drawers.

**Drawer Starting Amount**: In this box, enter the amount of cash that should go into a cash drawer at the beginning of a shift.

**Server Checkouts**: This list enables you set the system to require servers to perform a checkout when logging out of a POS connected to a cash drawer.

If you select **Not Required**, the default setting, the restaurant can effectively close (and receive three green check marks on the Daily Review) by closing all tickets closed and entering all tips for credit card transactions. The system will not enforce or allow any tip balancing to occur through the drawers. The program will assume tips have been paid and reflect against the TOTAL cash on reports.

If you select **Required**, the system will require all servers are checked out and all open cash drawers are closed before receiving a green check mark under **Cash** on the Daily Review page. Once all servers check out, the system will not enforce or allow any tip balancing to occur through the drawers. The program will assume tips have been paid and reflect against the TOTAL cash on reports.

If you select **Required with Balancing**, the system will require all servers to check out and balance before receiving a green check mark under **Cash** in the Daily Review page. Using this option, the system will allow you to balance a server through the cash drawer. The system will not assume all servers are balanced and the reports for the day's cash will include any unbalanced server totals.

**Cash Rollup**: If you select this check box, the POS will print a single total amount for all cash transactions performed during the server's shift in the Server Checkout Reports.

**Actual Cash Counting**: If you select this check box, the POS will require a manual count of the cash in any cash drawer used in the location. The POS will not close a cash drawer until you enter a cash count amount, and the system will report any difference between the System Expected Cash amount and the User Committed Cash value. If you clear this check box, the system will not prompt for or require a cash count to close cash drawers.

**Allow Multiple Staff on a Cash Drawer**: If you select this check box, the POS will allow multiple staff members to access a single cash drawer using the same device.

**Print No Sale Slips**: If you select this check box, the POS will print a slip whenever a No Sale transaction is performed. This slip will include the time, date, and the name of the device that performed the transaction.

**Round Cash Due**: This control enables you to set the POS to round the total amount due for checks paid with cash down to a preset multiple. This feature enables you to perform cash transactions with simple change amounts.

If you select **Disabled**, the POS will not round down the due amount for cash transactions.

If you select **Round Down**, the POS will round all cash due amounts down to the multiple specified in the **Round To** box. When you select **Round Down**, the program will display the **Round To** box. In the **Round To** box, you can enter the multiple that you want the POS to round down to. For instance, if you enter ".05", the program will round cash due amounts down to the nearest multiple of 5 cents (such as 41.35").

**Checkout Report Category Sales**: In this list, you can set the POS to print either gross or net totals as the Sales total on server checkouts.

## Advanced Settings

**Modify Staff on Paid Tickets**: If you select this check box, the POS will allow you to change the server associated with a paid ticket. If you clear this check box, the POS will allow servers to access a paid check's info screen, but not change its server.

**Discount Restrictions**: This list enables you to restrict certain discount types or actions performed at the POS. If you select **Discounts and Negative Adjustments**, the POS will allow servers to add discounts to an item, or an adjustment with a negative amount to the ticket, but not both. If you select **Multiple Negative Adjustments**, the POS will not allow servers to add more than one adjustment with a negative amount to a ticket.

If you select **Both**, the POS will not allow servers to add both discounts and negative adjustments to the same ticket or add multiple negative adjustments to a single ticket. If you

select **None**, the POS will not restrict servers from adding discounts or negative adjustments to tickets.

**Gift Tipping**: If you select this check box, the POS will allow servers to add tips to transactions paid with a gift card.

**Epson Status Pre Check**: If you select this check box, the POS will check the status of its printer before sending a print job to the printer. This feature only applies to Epson printers.

**Online Ordering Max Lead Time**: In this box, you can set a maximum lead time for online orders. If you enter a number of minutes in this box, the system will add that number to the prep time for items ordered in the Online Ordering app.

**Cancel Running EMV Transactions**: If you select this check box, the POS will only attempt to process an EMV transaction for up to 30 seconds. If it is unable to process the transaction in that time, it will display an option prompt, allowing the servers to cancel the transaction.

**Force Voids**: If you select this check box, the POS will allow you to force the void of a transaction. You can use this feature to remove a transaction for reporting purposes. If you try to void a payment and it fails, the POS will display a prompt asking if want to perform a force void. If you tap **Yes**, the POS will void the transaction from its records.

We recommend that you disable this feature during normal operations, and use it only for troubleshooting unusual cases. Afterwards, always disable it and then publish changes.

Force voids are not transmitted to the processor. If you perform one, you should record the transaction's information and contact the processor to ensure they handle it properly.

**Ticket Locking**: If you select this check box, the POS will not allow a server to access a ticket if that ticket is open on a different POS device. If you clear the check box, the POS will allow servers to open and edit tickets, even if the ticket is open on a different device.

**Generic Loyalty Store Code**: In this box, you can enter a unique identifier for a location for third-party loyalty programs such as Como and Paytronix.

**Integration IP Address**: If your site uses the Remote Eyes security camera service, you can enter the integration IP address in this box.

**Embedded Barcode Type**: This list enables you to configure the POS to read barcodes featuring embedded weight or price amounts. In the list, select the type of embedded barcode that the POS will read. If you want the POS to read barcodes that include an embedded weight amount, select **Weight**. If you want the POS to read barcodes that include an embedded price amount, select **Price**. If you do not want the POS to read either type of embedded codes, select **None**. If you select **Price** or **Weight**, the program will display additional controls for configuring barcodes.

Embedded barcodes are coded numbers that combine a product's SKU number with its price or weight, often separated with a special character.

**Barcode's Start Digit/Prefix**: In this box, you can enter the appropriate start digit or prefix character.

**Barcode's Max SKU Length**: In this box, you can enter the maximum number of digits of the SKU part of the embedded barcode. The price or weight amount will be combined with the SKU.

**Barcode has Verification Digit**: If the barcodes include a verification digit, you can enter it in this box. Enter a single digit or character separating the SKU from the weight or price.

**Barcode's Max Price/Weight Length**: In the box, enter the maximum number of digits of the price or weight amount of the barcode.

**Barcode's Number of Decimals in Price/Weight**: In the box, enter the maximum of decimals that the program will use for the price or weight amount.

**Barcode Has Check Digit**: Select the check box if the barcodes include a single digit or character at the end of the price or weight component.

# Online Ordering

The Online Ordering screen includes controls that allow you to configure the Online Ordering service. If your site plans to use the Online Ordering app, you can use these controls to edit the appearance and performance of the site's Online Ordering webpage.

## General Tab

The **General** tab includes controls that determine the appearance and performance of the site's Online Ordering website.

**URL Subdomain**: If you are configuring your site to use Online Ordering, you can enter the URL subdomain of the location's website in this box. After typing an appropriate subdomain in the box, if you click **.hrpos.heartland.us**, the program will create the website for Online Ordering service.

## Website Settings

**Set Logo**: If you click the **Set Logo** box, the program opens the Change Logo window. To add a graphic to the logo collection, click **Upload Image** (+), browse your local drive, and select an appropriate graphic. The program will upload to graphic to the logo collection. If you double-click a graphic in the collection, the program will display that graphic as the logo on the site's Online Ordering website. To remove a graphic from the collection, select the graphic and click **Remove Image**. To close the Change Logo window, click **Close**.

**Set Banner**: If you click the **Set Banner** box, the program opens the Change Banner window. To add a graphic to the banner collection, click **Upload Image** (+), browse your local drive, and select an appropriate graphic. The program will upload to graphic to the banner collection. If you double-click a graphic in the collection, the program will display that graphic as the banner on the site's Online Ordering website. To remove a graphic from the collection, select the graphic and click **Remove Image**. To close the Change Banner window, click **Close**.

**Primary Color**: The **Primary Color** box enables you to set the color of the background in the site's webpage. If you click this box, the program displays a color panel. In this panel, you can select an appropriate color.

**Primary Text Color**: The **Primary Text Color** list enables you to set the color of the primary text that displays in the site's webpage. In this list, you can select either black or white.

**Accent Color**: The **Primary Color** box enables you to set the color of the background in the site's webpage. If you click this box, the program displays a color panel. In this panel, you can select an appropriate color.

**Accent Text Color**: The **Accent Text Color** list enables you to set the color of the accent text that displays in the site's webpage. In this list, you can select either black or white.

**Text Banner:** This check box enables you to set the Online Ordering website to display a banner with customizable text on its main page. If you select this check box, the program will display the **Banner Text**, **Banner Background Color**, and **Banner Text Color** boxes directly below it.

**Banner Text:** If you type a message in this box, the Online Ordering website will display a banner with that text at the top of its main page.

**Banner Background Color:** This box enables you to set the color of the banner's background. If you click this box, the program displays a color panel. In this panel, you can select an appropriate color.

**Banner Text Color:** This box enables you to set the color of the text that displays in the banner. If you click this box, the program displays a color panel. In this panel, you can select an appropriate color.
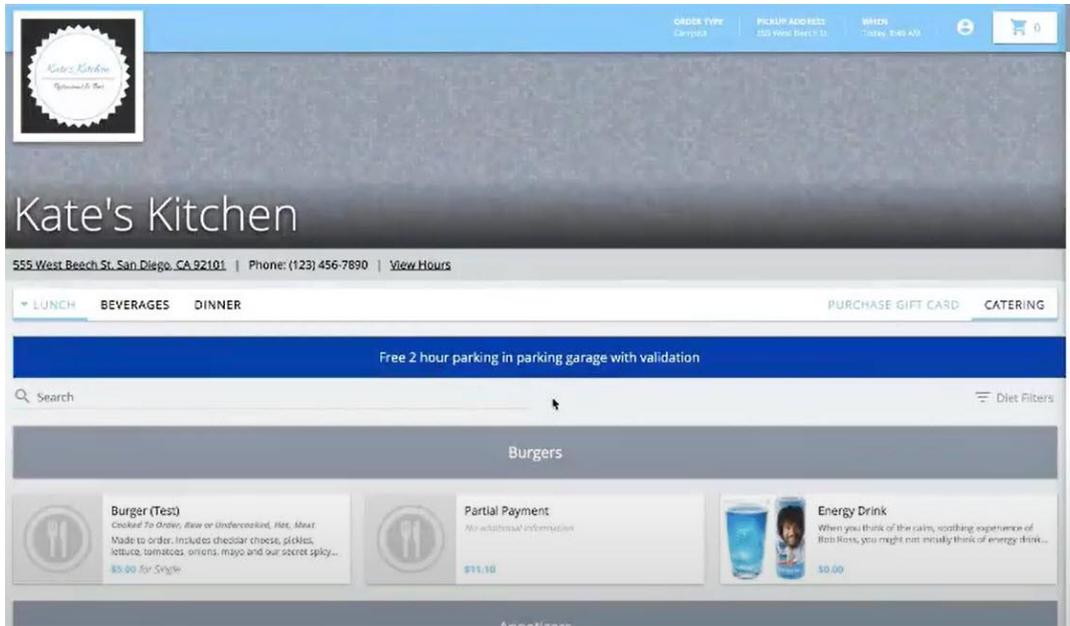
**Show Email Opt In**: If you select this box, the program will include controls on the site's webpage that enables customers to enter a personal email address and agree to receive email content from the site. The site can then collect those email addresses and send marketing materials to those customers.

**Assigned iPad**: This list enables you to select the specific iPad device that will receive and process orders entered at the site's webpage.

**Disable Special Instructions**: Normally, the site's webpage includes controls that enables customers to add special instructions to an order. If you select this check box, the program will not display those controls.

**Confirmation Email**: If you enter an email address in this box, the program will send a copy of every confirmation email sent to customers who create orders on the webpage. If you enter more than one email address in his box, separate them with semicolons.

**Send Tickets Unassigned**: If you select this check box, the program will send new checks created in the webpage to the POS with no assigned server, and it will automatically assign the check to the first server that opens the check.

**Google Analytics Tracking ID**: If you use the Google Analytics tool to manage the site's webpage, you can enter the page's tracking ID number in this box.

**Google Tag Manager ID**: If you use the Google Tag Manager tool to manage the webpage's tags, you can enter the tag manager ID number in this box.

# Site Preview

This program displays a preview of the site webpage in this panel. When you edit the appearance of the webpage, the panel enables you to preview the new appearance before saving your settings.

# Online Ordering Tab

The **Online Ordering** tab includes controls that allow you to include or exclude certain functions from the Online Ordering website, including carryout and delivery service.

# General Settings

**Language Switcher**: If you select this check box, the Online Ordering website will display the **Language** switch in the header of the Online Order website. The **Language** switch enables customers to change the language of the labels displayed in the Online Ordering website. By default, the Online Ordering website uses the language selected in the browser's settings, but the Language switch allows customers to override the default setting and view the website in another language. Currently the two options are **EN** for English, or **ES** for Spanish. (Currently, we only support the **Spanish (United States)** option in the browser's language settings, not the **Spanish** option.)



**Future Days Allowed for Online Orders**: This box allows you to set a limit on the maximum number of days before the current day that a future order can be placed through the Online Order website. If you enter a number in the box, Online Ordering will only accept future orders made for dates within the range of that number of days. For instance, if you enter "10", the POS will only allow servers to create future orders for dates within ten days of the current day.

**Ticket Prefix**: In this box, you can designate a prefix for all online order tickets created in the website so they can be easily identified. You can set a prefix up to four characters long, such as "WEB" and "OLO".

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**Disable Future Ordering**: If you select this check box, the Online Ordering website will not display controls for selecting a future date or time. When customers create new orders through Online Ordering, the website will automatically assign new orders to the next available time. This setting supersedes the setting of the **Future Days Allowed for Online Orders** box.

**Allow Gift Purchases**: If you select this check box, the Online Ordering website will include controls that enable customers to add eGift certificates to orders and to purchase them.

**eGift Room**: If your site uses the gift card program, you can use this list to associate eGift orders with a room. The list includes all of the rooms you have created in the Rooms screen.

**Send ASAP Orders Without Hold Time**: If you select this check box, the Online Ordering website will remove the hold times from "ASAP" orders. When placing an order with the Online Ordering website, if a customer specifies preparing the order as soon as possible, the website will ignore the order's lead time (if any) when it sends the order to the kitchen. Instead, the program will prompt the kitchen to begin preparing the item immediately.

## Carryout Settings

This area includes controls that enable you to configure the Online Ordering website to provide carryout service.

**Carryout Supported**: If you select this check box, the Online Ordering website will include Carryout as an order option, and activate the other controls in the Carryout Settings area.

**Carryout Active**: If you select this check box, the Online Ordering website will display and enable controls that customers can use to order items for carryout service.

**Carryout Room**: Tis list enables you to associate the orders and sales from carryout orders to a specific room.

**Carryout Payment Types**: This list enables you to specify what type of payments are acceptable for carryout orders. If you select **Credit Card**, the website will include controls allowing customers to pay with a credit card before submitting the order. This will be the only available method of paying for carryout orders. If you select **In-Person**, the website will print a slip when the customer submits the order. The customer then take the slip to a server or cashier and pay for the order in person. If you select **Both**, the website will allow customers to pay with credit cards when submitting an order, or wait and give payment to a server in in person.

**Carryout Minimum**: In this box, you can enter a required minimum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or greater than this amount.

**Carryout Maximum**: In this box, you can enter an enforced maximum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or less than this amount.

**Carryout Lead Time (in minutes)**: In this box, you can set a lead time for carryout orders. In you enter a number in this box, the website will add that number of minutes to the order's lead time, the amount of time the website will hold the order before printing its prep ticket in the kitchen.

**Carryout Tips Allowed**: If you select this check box, the website will display controls that enables customers to add a tip amount to an order in the website before submitting the order.

# Delivery Settings

This area includes controls that enable you to configure the Online Ordering website to provide delivery service.

**Delivery Supported**: If you select this check box, the Online Ordering website will include Delivery as an order option, and activate the other controls in the **Delivery Settings** area.

**Delivery Active**: If you select this check box, the Online Ordering website will display and enable controls that customers can use to order items for delivery service.

**Delivery Room**: This list enables you to associate the orders and sales from delivery orders to a specific room.

**Delivery Payment Types**: This list enables you to specify what type of payments are acceptable for delivery orders. If you select **Credit Card**, the website will only include controls enabling customers to pay with a credit card before submitting the order. This will be the only available method of paying for delivery orders.

If you select **In-Person**, the website not provide an option for credit card payment, and the customer will pay for the order in person when the driver delivers it.

If you select **Both**, the website will include options to pay either with a credit card or in person.

**Delivery Minimum**: In this box, you can enter a required minimum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or greater than this amount.

**Delivery Maximum**: In this box, you can enter an enforced maximum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or less than this amount.

**Delivery Lead Time (in minutes)**: In this box, you can set a lead time for carryout orders. In you enter a number in this box, the website will add that number of minutes to the order's lead time, the amount of time the website will hold the order before printing its prep ticket in the kitchen.

**Delivery Tips Allowed**: If you select this check box, the website will display controls that enables customers to add a tip amount to an order in the website before submitting the order.

# Delivery Area

This area includes controls that enable you to define the area surrounding the site where delivery service is available. The area includes a panel that displays a map (provided by Google Maps) of the area around the site's address.

If you click **New Polygon**, the program add a rectangular polygon inside the maps panel. You can then click and drag the polygon to the appropriate area within the map, and click and drag the nodes on the edges of the polygon to modify its shape, until it covers the site's total delivery area.

If you **New Polygon** again, the program add another (differently colored) polygon to the map, which you can then move and modify as needed. By adding multiple polygons to the map, you can define delivery areas with different delivery fees.

If you click **Reset Polygons**, the program will reset the map to its original state. It will all but one polygon, and the remaining polygon will have its original default size and location.

For each polygon that you add to the map, the program will display a **Delivery Fee** list with a label corresponding to the color of its polygon (such as **Blue Zone Delivery Fee**). In each **Delivery Fee** list, you can select a delivery fee. (You can define delivery fees in the Adjustments window.) Later, when a customer in this delivery zone places an order, the website will apply this delivery fee to the check.

Below each **Delivery Fee** list, the program displays a corresponding DELETE button (such as **DELETE BLUE POLYGON**). If you click one of these buttons, the program will remove the polygon from the map.

## Schedules: Carryout

The controls on this tab enables you to configure the availability of carryout service in the Online Ordering website.

**Carryout Menu & Hours**: You can use the controls in this area to designate the days of the week and times of each day when the items of specific menu groups are available for carryout service in the Online Ordering website. If you click ➕, the program will add one set of controls to the area. You can use these controls to set the availability time for one menu group. You can add multiple menu groups (with separate start and end times) to a single week, or you can add multiple weeks, each with different menu groups.



By selecting one or more of the day buttons, you can designate which days of the week the items in the menu groups are available for carryout service in the Online Ordering website.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for carryout service in the Online Ordering website. When servers order items in this menu group, the website will only display controls for carryout service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for carryout service.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Menu Group** list, select the menu group whose items you want to make available for carryout service during the selected days of the week.

**Carryout Override Menu & Hours**: This area includes controls that enable you to make carryout service available on one or more specific dates, even if the date is a day of the week that is set as unavailable in the **Carryout Menu & Hours** area.

If you click **Add a date**, the program will display a calendar window, allowing you to select a single date. If you select a date, the program will make carryout service on that date, even if it falls on a day of the week when carryout service is usually not available. You can add multiple dates to an override set.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for carryout service in the Online Ordering website. When servers order items in this menu group, the website will only display controls for carryout service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for carryout service.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Menu Group** list, select the menu group whose items you want to make available for carryout service during the selected days of the week.

# Schedules: Delivery

The controls on this tab enables you to configure the availability of delivery service in the Online Ordering website.

**Delivery Menu & Hours**: You can use the controls in this area to designate the days of the week and times of each day when the items of specific menu groups are available for carryout service in the Online Ordering website. If you click ⊞, the program will add one set of controls to the area. You can use these controls to set the availability time for one menu group. You can add multiple menu groups (with separate start and end times) to a single week, or you can add multiple weeks, each with different menu groups.

By selecting one or more of the day buttons, you can designate which days of the week the items in the menu groups are available for carryout service in the Online Ordering website.

In the **Menu Group** list, select the menu group whose items you want to make available for carryout service during the selected days of the week.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for delivery service in the Online Ordering website. When servers order items in this menu group, the website will only display controls for carryout service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for delivery service.

**Delivery Override Menu & Hours**: This area includes controls that enable you to make delivery service available on one or more specific dates, even if the date is a day of the week that is set as unavailable in the **Carryout Menu & Hours** area.

If you click **Add a date**, the program will display a calendar window, allowing you to select a single date. If you select a date, the program will make delivery service on that date, even if it falls on a day of the week when delivery service is usually not available. You can add multiple dates to an override set.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for delivery service in the Online Ordering website. When servers order items in this menu group, the website will only display controls for delivery service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for delivery service.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Menu Group** list, select the menu group whose items you want to make available for delivery service during the selected days of the week.

## Catering Tab

The **Catering** tab contains settings and controls needed to enable a Heartland Restaurant site to use the Catering service. The Catering service resembles the Online Ordering service, in that it allows a location to publish a website with features that enable customers to order items for catering service.

To enable Catering service for a location, log into the Admin Console and select the appropriate account. In the Main Menu, click **Account Info**. In the Account Info screen, select the **Catering** check box. Once you enable the Catering service, the program will make the Catering controls visible and active in the Online Ordering screen. To access these controls, click **Location**

**Setup** in the Main Menu, then click **Online Ordering**. In the Online Ordering screen, click the **Catering** tab.

When you define a Catering website for a location, the Catering website's URL resembles the URL subdomain of the Online Ordering website (configured on the **General** tab), supplemented with "-catering" text. For example, if the location's URL subdomain is "locationname.hrpos.heartland.us", then the Catering web address will be "locationname-catering.hrpos.heartland.us".

# General Settings

**Future Days Allowed for Catering Orders**: This box allows you to set a limit on the maximum number of days before the current day that a future order can be placed through the Catering website. If you enter a number in the box, the Catering website will only accept future orders made for dates within the range of that number of days. For instance, if you enter "10", the POS will only allow servers to create future orders for dates within ten days of the current day.

**Catering Cut Off Time**: In this box, enter the latest time during the day that a customer can place a catering order and receive it on the same day.

**Ticket Prefix**: In this box, you can designate a prefix for all catering tickets created in the website so they can be easily identified. You can set a prefix up to four characters long, such as "WEB" and "OLO".

**Disable Future Ordering**: If you select this check box, the Catering website will not display controls for selecting a future date or time. When customers create new orders through Catering, the website will automatically assign new orders to the next available time. This setting supersedes the setting of the **Future Days Allowed for Catering Orders** box.

# Carryout Settings

This area includes controls that enable you to configure the Catering website to provide catering carryout service.

**Allow Carryout**: If you select this check box, the Catering website will display and enable controls that customers can use to order items for carryout service.

**Carryout Room**: Tis list enables you to associate the orders and sales from carryout orders to a specific room.

**Carryout Payment Types**: This list enables you to specify what type of payments are acceptable for carryout orders. If you select **Credit Card**, the website will include controls allowing customers to pay with a credit card before submitting the order. This will be the only available method of paying for carryout orders. If you select **In-Person**, the website will print a slip when the customer submits the order. The customer then take the slip to a server or cashier and pay for the order in person. If you select **Both**, the website will allow customers to pay with credit cards when submitting an order, or wait and give payment to a server in in person.

**Carryout Minimum**: In this box, you can enter a required minimum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or greater than this amount.

**Carryout Maximum**: In this box, you can enter an enforced maximum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or less than this amount.

**Carryout Tips Allowed**: If you select this check box, the website will display controls that enables customers to add a tip amount to an order in the website before submitting the order.

# Delivery Settings

This area includes controls that enable you to configure the Catering website to provide catering delivery service.

**Allow Delivery**: If you select this check box, the Catering website will display and enable controls that customers can use to order items for delivery service.

**Delivery Room**: This list enables you to associate the orders and sales from delivery orders to a specific room.

**Delivery Payment Types**: This list enables you to specify what type of payments are acceptable for delivery orders. If you select **Credit Card**, the website will only include controls enabling customers to pay with a credit card before submitting the order. This will be the only available method of paying for delivery orders.

If you select **In-Person**, the website not provide an option for credit card payment, and the customer will pay for the order in person when the driver delivers it.

If you select **Both**, the website will include options to pay either with a credit card or in person.

**Delivery Minimum**: In this box, you can enter a required minimum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or greater than this amount.

**Delivery Maximum**: In this box, you can enter an enforced maximum dollar amount for carryout orders. If you enter an amount in this box, the website will only allow a customer to submit an order for carryout service if the check's total is equal or less than this amount.

**Delivery Tips Allowed**: If you select this check box, the website will display controls that enables customers to add a tip amount to an order in the website before submitting the order.

# Delivery Area

This area includes controls that enable you to define the area surrounding the site where delivery service is available. The area includes a panel that displays a map (provided by Google Maps) of the area around the site's address.

If you click **New Polygon**, the program add a rectangular polygon inside the maps panel. You can then click and drag the polygon to the appropriate area within the map, and click and drag the nodes on the edges of the polygon to modify its shape, until it covers the site's total delivery area.

If you **New Polygon** again, the program add another (differently colored) polygon to the map, which you can then move and modify as needed. By adding multiple polygons to the map, you can define delivery areas with different delivery fees.

If you click **Reset Polygons**, the program will reset the map to its original state. It will all but one polygon, and the remaining polygon will have its original default size and location.

For each polygon that you add to the map, the program will display a **Delivery Fee** list with a label corresponding to the color of its polygon (such as **Blue Zone Delivery Fee**). In each **Delivery Fee** list, you can select a delivery fee. (You can define delivery fees in the Adjustments window.) Later, when a customer in this delivery zone places an order, the website will apply this delivery fee to the check.

Below each **Delivery Fee** list, the program displays a corresponding DELETE button (such as **DELETE BLUE POLYGON**). If you click one of these buttons, the program will remove the polygon from the map.

## Schedules: Carryout

The controls on this tab enables you to configure the availability of carryout service in the Catering website.

**Carryout Menu & Hours**: You can use the controls in this area to designate the days of the week and times of each day when the items of specific menu groups are available for carryout service in the Catering website. If you click ⊞, the program will add one set of controls to the area. You can use these controls to set the availability time for one menu group. You can add multiple menu groups (with separate start and end times) to a single week, or you can add multiple weeks, each with different menu groups.



By selecting one or more of the day buttons, you can designate which days of the week the items in the menu groups are available for carryout service in the Catering website.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for carryout service in the Catering website. When servers order items in this menu group, the website will only display controls for carryout service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for carryout service.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Menu Group** list, select the menu group whose items you want to make available for carryout service during the selected days of the week.

**Carryout Override Menu & Hours**: This area includes controls that enable you to make carryout service available on one or more specific dates, even if the date is a day of the week that is set as unavailable in the **Carryout Menu & Hours** area.

If you click **Add a date**, the program will display a calendar window, allowing you to select a single date. If you select a date, the program will make carryout service on that date, even if it falls on a day of the week when carryout service is usually not available. You can add multiple dates to an override set.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for carryout service in the Catering website. When servers order items in this menu group, the website will only display controls for carryout service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for carryout service.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Menu Group** list, select the menu group whose items you want to make available for carryout service during the selected days of the week.

# Schedules: Delivery

The controls on this tab enables you to configure the availability of delivery service in the Catering app.

**Delivery Menu & Hours**: You can use the controls in this area to designate the days of the week and times of each day when the items of specific menu groups are available for carryout service in the Catering website. If you click ⊞, the program will add one set of controls to the area. You can use these controls to set the availability time for one menu group. You can add multiple menu groups (with separate start and end times) to a single week, or you can add multiple weeks, each with different menu groups.

By selecting one or more of the day buttons, you can designate which days of the week the items in the menu groups are available for carryout service in the Catering website.

In the **Menu Group** list, select the menu group whose items you want to make available for carryout service during the selected days of the week.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for delivery service in the Catering website. When servers order items in this menu group, the website will only display controls for carryout service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for delivery service.

**Delivery Override Menu & Hours**: This area includes controls that enable you to make delivery service available on one or more specific dates, even if the date is a day of the week that is set as unavailable in the **Carryout Menu & Hours** area.

If you click **Add a date**, the program will display a calendar window, allowing you to select a single date. If you select a date, the program will make delivery service on that date, even if it falls on a day of the week when delivery service is usually not available. You can add multiple dates to an override set.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available for delivery service in the Catering website. When servers order items in this menu group, the website will only display controls for delivery service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are available for delivery service.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the website will apply the rules set in the upsell group.

In the **Menu Group** list, select the menu group whose items you want to make available for delivery service during the selected days of the week.

# App Ordering

The App Ordering screen includes controls that enable you to configure the ordering options and behavior of the delivery, Skip the Line and Kiosk services.

## General Tab

The controls on the General tab enable you to configure service in the POS.

**Menu & Hours**: You can use the controls in this area to designate the days of the week and times of each day when the items of specific menu groups are available for purchase in the

POS. If you click ![+], the program will add one set of controls to the area. You can use these controls to set the availability time for one menu group. You can add multiple menu groups (with separate start and end times) to a single week, or you can add multiple weeks, each with different menu groups.
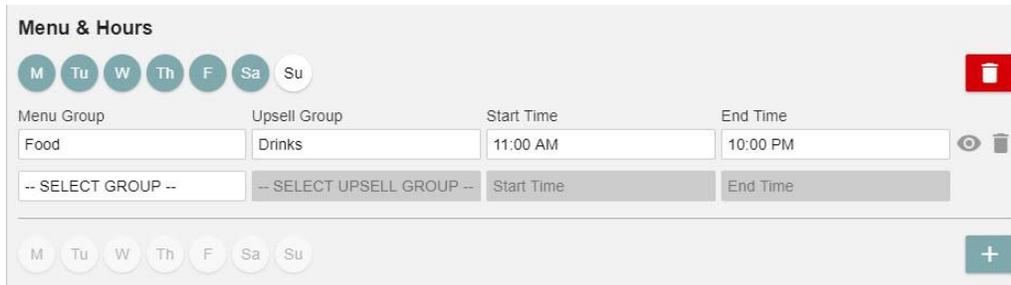


By selecting one or more of the day buttons, you can designate which days of the week the items in the menu groups are displayed in the POS menu screens.

In the **Menu Group** list, select the menu group whose items you want to make available during the selected days of the week.

In the **Upsell Group** list, you can associate a main group with an appropriate upsell group. When a server orders items in the main group, the POS will apply the rules set in the upsell group.

In the **Start Time** and **End Time** boxes, you can set the time range within each day that the items in the main group are available in the POS. When servers order items in this menu group, the POS will only display controls for delivery service within the time range you set here. By setting a start time and end time, you set the time range during each selected day that the items in the menu groups are displayed in the POS menu screens.

**App Settings**: You can use the controls in this area to set the general appearance of the app.

The **Set Logo** box enables you to set a logo graphic, which the POS and other apps will display. If you click the **Set Logo** box, the program opens the Set Logo window, displaying the site's collection of uploaded graphic files. To add a new graphic to the collection, click **Upload New Image**. The program will open a browser window, allowing you to find and select a graphic on the network. After uploading the graphic to the collection, you can then select it, and the POS will display it as the site's logo.

The **Set Banner** box enables you to upload a graphic that the POS and other apps will display as a background banner. If you click the **Set Logo** box, the program opens the Set Banner window, displaying the site's collection of uploaded graphic files. To add a new graphic to the collection, click **Upload New Image**. The program will open a browser window, allowing you to find and select a graphic on the network. After uploading the graphic to the collection, you can then select it, and the POS will display it as a background banner.

In the **Assigned iPad** list, you can select the iPad device that will receive and process all app orders.

If you click the **Primary Color** box, the program will open a color selection panel. In this panel, you can select a color. The POS will use that color as the primary color in its Log In and other screens.

**Slide Show Images**: You can use the controls in this area to configure the POS slide show.

The **Set Ad** box enables you to add a graphic to the POS slide show. If you click the **Set Ad** box, the program opens the Set Ad window, displaying the site's collection of uploaded graphic files. To add a new graphic to the collection, click **Upload New Image**. The program will open a browser window, allowing you to find and select a graphic on the network. After uploading the graphic to the collection, you can then select it.

The **Slide Show Images** area includes three **Set Ad** boxes, enabling you to add up to three images to the slide show.

In the **Ad Duration** box, enter the number of seconds that the POS should wait before changing each slide.

**Send Tickets Unassigned**: If you select this check box, the POS will not automatically assign a server to newly received tickets. Rather, the POS will assign the ticket to the last server to access and save changes to the ticket.

**Auto Close Tickets**: If you select this check box, the POS will automatically close tickets from the Skip the Line or Kiosk services when they are paid in full.

**Carryout Enabled**: If you select this check box, the apps will display controls to designate orders for carryout service.

**Carryout Room**: In this list, you can select a room for carryout orders. The POS will associate all carryout orders and sales with this room.

**Eat In Enabled**: If you select this check box, the apps will display controls to designate orders for eat-in service.

**Eat In Room**: In this list, you can select a room for eat-in orders. The POS will associate all eat-in orders and sales with this room.

# Skip the Line Tab

The controls on the **Skip the Line** tab enable you to configure the Skip the Line service.

**Skip the Line Enabled**: If you select this check box, the program will enable the Skip the Line features for the site. The program will make the controls for configuring Skip the Line available, and the apps will include controls to allow customers to place Skip the Line orders.

**Ticket Prefix**: If you type a word or phrase in this box, the app will print it at the top of any ticket for orders made through the Skip the Line service.

**Allow Credit**: If you select this check box, the app will display payment options to allow customers to pay for the order with credit cards.

**Allow Gift**: If you select this check box, the app will display payment options to allow customers to pay for the order with gift cards.

**Allow Pay in Person**: If you select this check box, the app will display payment options to allow customers to pay for the order "in person." The app will print a slip, which the customer can then take to a cashier, who will accept payment directly from the customer.

## Kiosk Tab

The controls on the **Kiosk** tab enable you to configure the Kiosk app.

**Kiosk Enabled**: If you select this check box, the program will enable the Kiosk features for the site. The program will make the controls for configuring the Kiosk available, and the apps will include controls to allow customers to place Kiosk orders.

**Ticket Prefix**: If you type a word or phrase in this box, the app will print it at the top of any ticket for orders made with Kiosk.

**Require Guest Locator Number for Carryout Orders**: If you select this check box, Kiosk will require customers to enter a locator number before allowing them to place a carryout order.

**Require Guest Locator Number for Eat In Orders**: If you select this check box, Kiosk will require customers to enter a locator number before allowing them to place an order for dine-in service.

**Enable Order History**: If you select this check box, Kiosk will provide customers the option of entering a phone number and reordering a recent order from the customer's order history.

**Allow Credit**: If you select this check box, the app will display payment options to allow customers to pay for the order with credit cards.

**Allow Gift**: If you select this check box, the app will display payment options to allow customers to pay for the order with gift cards.

**Allow Pay in Person**: If you select this check box, the app will display payment options to allow customers to pay for the order "in person." The app will print a slip, which the customer can then take to a cashier, who will accept payment directly from the customer.

**Kiosk Language Options**:

# Rooms

The Room screen includes controls that enable you to define and configure records for each room in the site.

**Name**: In this box, type a descriptive name for the room.

**Revenue Center**: In this list, you can associate the room with a revenue center. If you select **Dine In** or **To Go**, the program will include sales performed in this room with the total sales from all rooms in the "Dine In" or "To Go" revenue center when generating sales reports. If you select **None**, the program will not include sales performed in this room in the total sales of any revenue center. You can define revenue centers in the Revenue Centers screen, accessible in the **Account Menu**.

**Type**: This list enables you to select the type of room you are configuring. In the POS, different room types feature different sets of controls.

If you are defining a room where customers are not associated to physical tables (such as a bar), select **Tab**. If you are defining a room where a host or server assigns customers to tables, select **Table Layout**. (If you select **Table Layout**, the Room Layout controls will appear in the bottom of this window.) If the room is a space where a dispatcher or server assigns orders to delivery drivers, select **Delivery**.

**Default Ticket Screen**: In this list, you can select the type of ticket screen that the POS displays when you access the room. If you select **Menu Items**, the POS will display a ticket screen with a panel containing buttons representing menu items. If you select **Ticket Info**, the POS will display a ticket screen with a panel displaying the ticket's information.

**Auto Exit Paid Tickets**: This list enables you to set the POS to automatically exit the screen after paying a check. If you select **Off**, the POS will not exit the screen. If you select **Immediately**, the POS will exit the screen immediately after it's paid. If you select **After 1 second delay**, the POS will exit the screen after a delay of one second. If you select **After (2, 3, 4, or 5) second delay**, the POS will exit the screen after a delay of two, three, four, or five seconds.

**Send Ticket Behavior**: This list enables you to set the POS to automatically open a new check after certain events, such as sending a ticket. If you select **None**, the POS will not open a new check. If you select **Start New Ticket on Send**, the POS will automatically open a new ticket after you send a ticket. If you select **Start New Ticket on Tender**, the POS will automatically open a new ticket after you pay a check in the Tender screen. If you select **Start New Ticket on Send and Tender**, the POS will automatically open a new ticket after you either send a ticket or pay a ticket in the Tender screen. If you select **Logout on Send**, the POS will automatically log out after you send a ticket.

**Fast Cash**: If you select this check box, the POS check screen will include a button that enables you to automatically pay a check with the cash tender.

**# Credit Card Receipts**: This list enables you to set the number of receipts that the POS will print when a customer uses a credit card or house account to pay a ticket opened in this room. If you select "0", the POS will not print a receipt. If you select "1" or "2", the POS will print one or two copies of the receipt.

**# Cash Receipts**: This control enables you to set the POS to print one, two, or no copies of the receipt when a customer uses cash to pay a ticket opened in this room. If you select "0", the POS will not print a receipt. If you select "1" or "2", the POS will print one or two copies of the receipt.

**QR Code**: The list enables you to set the POS to print a QR code on guest checks and transaction receipts for use with the Guest app. You should enable this feature for any location using the Guest app, as it allows customers to scan their checks and receipts.

If you select **Disabled**, the POS will not include a QR code on printed checks. If you select **Ticket Lookup**, the POS will print a QR code representing the ticket number. This will enable staff to scan the code with a front camera to find tickets.

If you select **Scan to Pay**, the POS will print a QR code that the guest can scan with the Guest app to pay the ticket. If you select **Scan for Points**, the POS will print a QR code that the guest can scan on the Guest app to redeem points for loyalty.

If you select **Scan to Pay and Scan for Points**, the POS will print a QR code that that customers can use to pay a ticket or redeem loyalty points with the Guest app. This option also enables ticket lookup.

Also, after opening a ticket and sending the order, you can add a customer's contact information, including the number of the customer's cell phone. After entering and saving this information, if you click [SMS icon], the POS will send an SMS text message to the customer, with a link to the payment website. Upon receiving the message, the customer can tap the link and finish performing the QR payment.
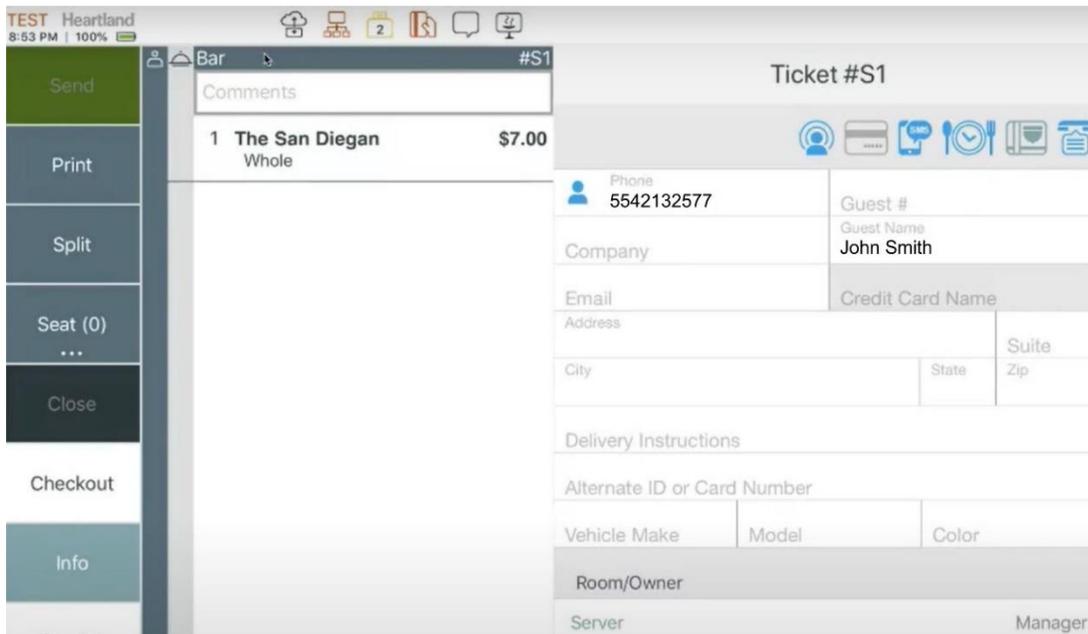


**Fixed Tip Suggestions**: If you select this check box, the POS will display suggested tip amounts in the Sign and Tip screen as fixed dollar amounts. If you clear this check box, the POS will display suggested tip amounts as percentage amounts.

**Suggested Tip Amounts**: In these boxes, you can set the amounts of three suggested tip amounts. The POS will display these three amounts as suggested tip options in the Sign and Tip screen.

**Universal Modifier**: If you type a word or phrase in this box (such as "To Go"), the POS will include it as a modifier option in the Menu screen. If a server applies it to a menu item, the POS will add the text to the item's description in the KDS display and kitchen slips, but not on guest checks, receipts, or reports.

**Seat Caption Override**: If you enter a word in this box, the POS will replace "Seat" with this word when displaying seat numbers in the app or in printed slips.

**Surcharge Amount**: This box enables you to set the POS to add a surcharge to checks opened in this room. In the box, you can enter either a flat amount or a percentage amount for the surcharge. If you click **$**, the POS will add the amount in the box as a flat amount to the check. If you click **%**, the POS will add the amount in the box as an amount that is a percentage of the check's total.

**Kitchen Display Warn Minutes**: This box allows you to enter a period of time, in minutes, before displaying a warning in the kitchen display that a ticket is approaching its late time. For each ticket in the kitchen display, the POS will change its background color to yellow after that number of minutes has expired.

**Kitchen Display Late Minutes**: This box allows you to enter a period of time, in minutes, before displaying a warning in the kitchen display that a ticket has reached its late time. For each ticket in the kitchen display, the POS will change its background color to red after that number of minutes has expired.

**Auto Close Paid Tickets**: This list enables you to set the POS to automatically close a ticket after it is paid. If you select **None**, the POS will not automatically close any tickets after they are paid. If you select **All**, the POS will close all tickets after they are paid. If you select **All, except Credit Cards**, the POS will close all tickets except those paid with credit card tenders after they are paid.

**Hide Credit Card Tips**: If you select this check box, the POS will not include a line for tips on printed credit card receipts.

**Separate Kitchen Slips**: If you select this check box, the POS will split up kitchen slips by seat number when sending them to the prep printers. For this function to work, you must set the display formats receiving the prep slips to separate kitchen slips (in the Display Format Settings screen, using the **Separate Kitchen Slips** list).

**Detailed Transaction Receipts**: If you select this check box, the POS will include each order's itemized details on printed receipts for credit card and house account transactions from this room.

**Auto Present Signature Screen**: If you select this check box, the POS will automatically display the signature capture screen after a customer pays a check with a credit card tender.

**Ignore Guest Display**: If you select this check box, the POS will not display a ticket's order information on the paired guest display (if any).

**Require Guest #**: If you select this check box, the POS will prompt for a guest number when you open a new ticket.

**Require Guest Name**: If you select this check box, the POS will prompt for a guest name when you open a new ticket.

**Require Phone**: If you select this check box, the POS will prompt for a customer's phone number when you open a new ticket.

**Guest Feedback Message**: If you enter a phrase in this box, the POS will display it as a message in the Sign and Tip screen, prompting customers to provide a rating of their visit. The default message is "Give us feedback!"

**Post Signature Message**: If you enter a phrase in this box, the POS will display it as a message in the Sign and Tip screen after guests complete their transaction. The default message is "Thank you!"

**Override Taxability for Tax Inclusive Items**: This list enables you to set the POS to override the taxability status of tax inclusive menu items. If you select **Off**, the POS will not override the status of any tax inclusive items. If you select **Taxable if any other items are taxable**, the POS will override the status of any tax inclusive items only if the check includes any taxable items. If you select **Always taxable**, the POS will override the status of all tax inclusive items on the ticket.

**Default Menu Group**: In this list, you can select a default menu group for the room. When you open a ticket in this room, the POS will automatically display buttons for the items I this group. You can create menu groups in the Groups screen (in the **Account Menu**).

**Room Charges**: In this list, you can select a charge for the room. You can create charges in the Adjustments screen (in the **Account Menu**).

**Pricing**: In this list, you can select a pricing rule for the room. You can create pricing rules in the Pricing screen (in the **Account Menu**).

**Show Grid**: If you select this check box, the program will display a grid in the **Room Layout** panel. You can use the grid to help create better looking layouts in the Room Layout panel.

**Snap to Grid**: If you select this check box, the program will automatically snap elements in the Room Layout panel to its gridlines.

**Room Layout** area: This area includes controls that enable you to create a graphical layout of the room. Using these controls, you can create a floor plan with tables and other objects that resembles the layout of the actual physical room that this record represents. The Room Layout area is only visible if you select **Table Layout** in the **Type** list.

This area includes four groups of elements: Floors, Tables, Symbols, and Shapes.

If you select **Floors**, the program will display a variety of tile options. If you click a tile, the program will fill the floor of the layout panel with the selected tile.

If you select **Tables**, the program will display a variety of table options, in various sizes, shapes, angles and cover counts. If you click a table, the program will that table icon to the room layout. After adding a table, you can click and drag the table to an appropriate position in the layout.

When you add a table, the program gives the table a unique number. You can change a table's number by selecting the table and then entering a new number in the **Selection Name** box.
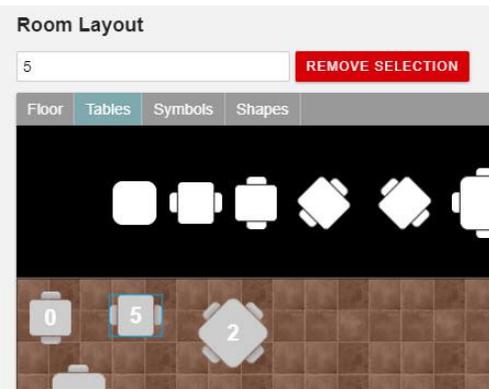


If you select **Symbols**, the program will display a variety of symbols representing objects other than tables, such as entrances, exits, and plants. If you click a symbol, the program will that symbol icon to the room layout. You can then click and drag the symbol to an appropriate position in the layout.

If you select **Shapes**, the program will display a square and a circle as shape options. If you click one of these shapes, the program will that shape to the room layout. The shape will include nodes that enable you to change its size and shape. By clicking and moving the nodes, you can adjust the size and angle of a rectangular or circular shape. After adjusting a shape, you can click and drag the shape to an appropriate position in the layout.
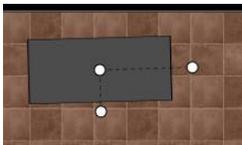


To remove any of these elements from the room layout, select the element and then click **Remove Selection**.

# Custom Tender Setup

The Custom Tenders Setup screen includes controls to define custom tender types, such as house accounts.

**Account Name**: In this box, you can enter a descriptive name for the custom tender (such as "House Account").

**Active**: If you select this check box, the tender will be available for use in the POS. If you clear the check box, the tender will not appear as a payment option in the POS.

**Account Holder**: In this box, you can enter the name of the person who is responsible for payments made with this tender.

**Phone**: In this box, enter the contact phone number of the account holder.

**Email**: In this box, enter the contact email address of the account holder.

**Card Number or Access Code**: You can associate the tender with a card number or access code by entering a number in this box. Later, if you swipe a card with this number or enter the access code at the Tenders screen, the POS will apply this tender to the check.

**Require Card or Access Code**: If you select this check box, then customers must provide the card number or account code to use this tender. If a server selects this tender to pay a check, the app will prompt for a card number or account code, entered either by swiping the card or manually entering the code. This check box is only available if you enter a number or code in the **Card Number or Access Code** box.

**House Account**: If you select this check box, the app will include sales paid with this tender to house account totals in server checkouts and all sales reports.

**Manage Account Balance**: If you select this check box, the program will allow you to set a credit limit to the tender. It will also allow customers to make payments to the tender, in part or in whole, at the POS. (This setting is required for tenders associated with MobileBytes gift accounts.)

**Credit Limit**: In this box, you can enter an enforced maximum credit limit for this tender. If you enter an amount in this box, the app will only allow a customer to submit an order for carryout service if the check's total is equal or less than this amount. This check box is only available if you select the **Manage Account Balance** check box.

**Tips**: If you select this check box, the POS will allow customers to use this tender to add tips to their checks. When you select this check, the program will make the following boxes available:

 ▸ **Server – Cash (%)**:

 ▸ **Server – Payroll (%)**:

 ▸ **Merchant (%)**:

**Signatures**: If you select this check box, the POS will allow servers to access the signature capture feature in the POS when paying a check with this tender. The POS will also include tip lines when it prints authorization slips for orders paid with this tender.

**Open Drawer**: If you select this check box, the POS will open the cash drawer when you pay a check with this tender.

**Require Reference**: If you select this check box, the POS will prompt the server to enter a reference (such as a code for a voucher) before accepting the tender as payment.

**# Transaction Receipts**: This list enables you to set the number of receipts that the POS will print when you pay a check with this tender. You can set the POS to print one, two, or no receipts.

**Notes**: If you need to save any other information about the tender in the record, you can type that information in the **Notes** box.

# Paid In & Out Types

In this screen, you can create paid in and paid out types, separate categories (typically defined by different reasons) for transactions where cash is paid in or out of a cash drawer.

**Name**: In this box, type a descriptive name for the pay in or pay out type.

# Payout Apportions

The Payout Apportioning screen includes controls that enable you to determine how much of each server's tips and service charge payouts they collect in cash or through payroll. Also in this screen, you can set the POS to withhold a percentage of each server's tips to cover interchange fees.

For each of these five types of transactions, you can set the percentage amount that goes to the server as cash, that goes to the server in payroll, and that is withheld for the merchant.

- ▸ Credit Card Tips
- ▸ Surcharge Payouts
- ▸ Gift Cards
- ▸ House Account Tips
- ▸ Service Charge

In each of these categories, the three amounts must equal a total amount of 100%. By default, the system sets all of the categories to 100% to the Server in Cash.

We recommend sites to set these apportions and publish changes before any staff begin performing any transactions for the day. Once a tip is apportioned, the system will hold it in that apportioned percentage until its server checks out.

The POS includes the amounts of these apportioned categories in the server checkout report slip.

# Tip Out Types

The Tip Out screen enables you to define suggested tip outs and tip pools. In the POS, you can use these tip outs to allocate a percentage of a staff member's net sales, gross sales, or tips directly to another staff member of a group tip pool.

You can configure tip out types to be either suggested or automatic. Suggested tip outs will appear on the server checkout with the suggested dollar amount that should be tipped out to each tip out type that has been configured. Automatic tip out types will appear on the server checkout and automatically deduct the total tip out from the total tips that are due to that staff member.

**Name**: In this box, type a descriptive name for the tip out type.

**Tip Pool**: If you select this check box, the POS will apply this tip out type as a pool. In a tip pool, servers allocate tips into a group pool, and later the tips are redistributed to staff members based on their hours worked. If you clear this check box, the POS will not allow you to redistribute tips of this type.

**Type**: If the tip out type is a tip pool, you can set the type as either **Suggested** or **Automatic**. If you select Suggested, the POS will display a suggested tip out amount in the server checkout screen. If you select Automatic, the POS will automatically allocate the tip out amount to the pool.

**Job Types**: In these lists, you can associate one or more job types with this tip out type. If you select a job type in one of the **Job Type** lists, the POS will make this tip out type available to staff working in the specified job type.

**Percent**: In this box, you can enter a percentage amount of the server's tips that the POS will tip out.

**Category**: In this list, you can select the category, Net Sales, Gross Sales or Total Tips, to determine the tip out amount.

**Report Categories**: If you select Gross Sales in the Category list, the program will display the **Report Categories** list. In this list, you can select a specific report category for the tip out type. The POS will apply tip outs of this type to the percentage of the selected category.

For example, selecting 2% of Gross Sales and then specifying the Food Report Category will result in the staff tipping out 2% of Food Sales.

**Balancing**: This list enables you to set how the tips in this tip out type are balanced at the end of the day. If you balance tips out of the current day's expected cash, select **Cash**. If you pay tips out on payroll, select **Payroll**.

# Dayparts

The Dayparts screen includes controls that enable you to define multiple day parts, the various periods of time during each day of the week that the site operates. You can define a set of day parts, periods of time within a day, and apply them to one or more days of the week. In the Dayparts area, select the days of the week that the set will apply to by tapping one or more day buttons.

Below the day buttons, each set features a list of one or more day parts, each one featuring a **Start Time** box, **End Time** box, and a **Daypart Category** list. To add a new day part to the set, click .

You cannot edit the time in the **Start Time** boxes. The first day part in the set will automatically have a start time of 12 AM, and each subsequent day part will have its time set to the end time of the preceding day part. You can set the end time of each daypart in its **End Time** box.

Each daypart includes a **Daypart Category** list, allowing you to set a category. You can define daypart categories in the Daypart Category screen (in the Account menu).

# Payment Gateway

The **Payment Gateway** screen includes controls that enable you to configure the site to use a credit card or gift card processing service. The processor gives the Dealer a VAR sheet to populate these fields.

## In-Store Settings area

In this area, you can configure the site to use a credit card processing service.

**Gateway**: In this list, you can select the payment gateway that the site uses (**BridgePay** or **Monetary**). If you select **Monetary**, the program will display the Monetary Credit/Debit Card Boarding window; those fields are listed in this section.

**EMV Solution**: If the site's payment gateway supports a swipe device that can read and process EMV cards, select **EMV**. If the site's gateway supports a PAX swipe device, select **PAX**. If the payment gateway does not support an EMV-enabled or PAX devices, select **None**. If you select **Monetary**, the program will display the EMV Boarding window; those fields are listed in this section.

**PAX Interface**: In this list, select the PAX interface that your site's service uses, **Legacy (stable)** or **Heartland SDK**.

**Portico Direct:** Check this box if you are processing strictly with Heartland. Note that tips, voids and refunds may be performed more rapidly by going direct to Portico. If you select this box, the program will display the Heartland In-Store Settings fields; those fields are listed in this section.

**Transaction Method**: Select the appropriate transaction method for the site's service, **Auth/Capture** or **Sale/Adjust**.

**Gift Card**: If the site is using a service to process gift cards, select the service in this list.

## BridgePay Settings

If your site uses the BridgePay service to perform and process credit card transactions, you can set the following credentials needed to access the service:

‣ **Username:** Enter your BridgePay username.

▸ **Password:** Enter your BridgePay password.

▸ **Merchant Key:** The Merchant Key allows the POS to interact with BridgePay's reporting service in order to prevent duplicate charges.

# EMV Boarding Window

**Number of EMV Terminal Lanes:** Enter the number of EMV terminal lanes.

**Ship TranCloud device to:** Enter your site's location (e.g. 1 Heartland Way Jeffersonville, IN 47130)

# Monetary Settings

If your site uses the Monetary service to perform and process credit card transactions, you can set the following credentials needed to access the service:

▸ Monetary Secret Key: Enter the Monetary Secret Key.

▸ Monetary Public Key: Enter the Monetary Public Key.

▸ Processor: Enter the processor information.

▸ Site ID: Enter the Site ID.

▸ License ID: Enter the License ID.

▸ Device ID: Enter the Device ID.

▸ Username: Enter the Username.

▸ Password: Enter the Password.

▸ MID Category: Enter the MID Category.

# Online Settings area

In this area, you can configure the Online Ordering app to use the site's credit card processing service.

**Gateway**: In this list, you can select the payment gateway that the site uses for processing payments for orders made with the Online Ordering service. If you select **Monetary**, the program will display the Monetary Credit Card Boarding window.

**Transaction Method**: Select the appropriate transaction method for the site's service, **Auth/Capture** or **Sale/Adjust**.

**Heartland Gift**: If you select this check box, the program will provide gift card service in the Online Ordering app and also accept and process gift card transactions with PAX terminals inside the store. If you select this check box, the program will display the Heartland Gift Settings area.

## Heartland In-Store Settings

Enter the following information to configure Heartland In-Store settings:

- ► Site ID: Enter the Site ID.
- ► License ID: Enter the License ID.
- ► Device ID: Enter the Device ID.
- ► Username: Enter the Heartland In-Store username.
- ► Password Enter the Heartland In-Store password.

**Allow Manual Entry for Credit Cards**: If you select this check box, the POS will allow servers to enter credit card numbers manually. In the POS payment screen, the app will display the **Card** button with ellipses (...). If you press and hold the **Card** button, the app will open a panel prompting you to enter the credit card number, expiration date, CVV, and ZIP/Postal code.

## Heartland Gift Settings

In this area, you can configure the site to use the site's processing service to process gift card transactions.

- ► URL: Enter the url address.
- ► Username: Enter the Heartland Gift username.
- ► Password: Enter the Heartland gift password.
- ► Domain: Enter the domain (e.g. hps)
- ► Chain: Enter the chain information.
- ► Store: Enter the store number.

# Monetary Credit Card Boarding Window

**Owner Name**: Enter the site owner's name.

**Owner Email**: Enter the site's email address.

**Restaurant Name**: Enter the site's name

**Address**: Enter the site's mailing address.

**Phone Number**: Enter the site's telephone number.

**Website URL**: Enter the URL of the site's website.

**eCommerce**: Select this check box to indicate if the site is required to process online and mobile payments.

**TranCloud**: Select this check box to indicate if the site is required to process EMV payments.

**Configured Batch Time**: Select this check box if you have established a batch time with the processor.

**Processor**: Click to select your processor (e.g. Heartland).

**Site ID:** Enter the Site ID.

**License ID:** Enter the License ID.

**Device ID:** Enter the Device ID.

**Username:** Enter the username.

**Password:** Enter the password.

**MID Category:** Click in the field to choose from Restaurant or Retail.

# Staff

In the Staff screen, you can create records for each of the site's staff member. In each staff member, you can record their contact information, associate them with job types, define their standard and overtime pay rates, and set their security positions, and access to reports.

**First Name**: Enter the staff member's first name.

**Last Name**: Enter the staff member's last name.

**Employee ID**: Enter the staff member's employee ID number.

**Login Pin**: Enter the staff member's login personal identification number.

**Phone**: Enter the staff member's phone number.

**Salary**: If you select this check box, the POS will not require this employee to clock in or out. Select this check box for employees paid on salary, rather than an hourly rate.

**Daily Hours Before Overtime Begins**: In this box, you can enter the number of hours that the staff member works within a single day before earning the overtime pay rate. This setting overrides the overtime payroll setting in the location records.

**Active**: If you select this check box, the employee will have access to the POS. If you clear this check box, he POS will not allow this employee to log in.

**Job Types**: These lists enable you to associate the employee with one or more job types. These lists include all of the job types you've created in the Job Types screen. If you select a job type in one of these lists, the program will display an additional list, enabling you to select another job type.

For each job type you select, the program display an accompanying **Regular Rate** and **Overtime Rate** box. In these boxes, you can enter the staff member's hourly pay rate for regular and overtime hours.

**Permission**: In this list, you can associate the staff member with a permission set. This list includes all of the permission sets you have created in the Permissions screen.

**Report Access**: In this list, you can associate the staff member with a report access set. This list includes all of the report access sets you have created in the Report Access screen.

# Job Types

The Job Types screen includes controls that enable you to define the types of jobs that staff members can work in the site and set the various options and features specific to each job type.

**Name**: In this box, type a descriptive name for the job type.

**Time Clock Only**: If you select this check box, when staff members log into this job type, the POS will only allow access to the time clock and no other POS functions. This feature is intended for job types that do not involve using the POS, such as cooks or dishwashers.

**Require Tips**: If you select this check box, the POS will prompt staff members to enter a tip amount when they clock out. If you clear the check box, the POS will not require staff members to enter a tip amount.

**Hide Ticket Status**: If you select this check box, the POS will display the tickets of other staff members, as grey buttons without status information. If you clear the check box, the POS will display the tickets of other staff members as active with visible status information.

**Access to Other Tickets**: This list allows you to enable staff members working in this job type to access the tickets of other staff members. If you select **None**, the POS will not allow staff members to access other tickets. If you select **View Only**, the POS will allow staff members to view the tickets of other staff members, but not edit them. If you select **Edit**, the POS will staff members to access and edit the tickets of other staff members.

**Cash Transactions**: This list enables you to set what cash transactions the POS will allow staff to perform in this job type. If you select **None**, the POS will not display the Cash option in the Checkout screen, and will not close a check until the server pays the check with a payment other than Cash.

If you select **Server Banking**, the POS will display the Cash option in the Checkout screen and will allow servers to close a check after paying it with cash. However, the POS will not open the cash drawer. Staff in this job type must tender cash to a server bank, not a physical cash drawer.

If you select **Cash Drawer**, then staff in this job type will be allowed to tender cash out of a cash drawer.

This option is a prerequisite to tendering cash, voiding cash transactions, performing and approving pay ins and outs, performing server balances, and doing no sales. If you select this option, you can then set other permissions for using cash drawers.

**Tender Cash Permission**: This list enables you permit or restrict staff in this job type to pay tickets with cash. If you select **None**, the POS will not allow staff members to pay tickets with cash. If you select **Assigned Drawer**, the POS will allow a staff member to pay tickets with cash, but only if that staff member is assigned to a cash drawer. If you select **Any Drawer**, the POS will allow a staff member to pay tickets on any physical cash drawer, even if that staff member is not assigned to the drawer. This setting is useful for managers who are never assigned to cash drawers but may still need access to them.

**Void Cash Permission**: This list enables you to permit or restrict staff in this job type to void cash transactions. If you select **None**, the POS will not allow staff members to void cash transactions. If you select **Assigned Drawer**, the POS will allow a staff member to void cash transactions if they were tendered on their assigned cash drawer. If you select **Any Drawer**, the POS will allow a staff member to void cash transactions that were tendered on any drawer. This setting is useful for manager who are never assigned to cash drawers but may still need access to them for voids.

**Pay In/Out Permission**: This list enables you permit or restrict staff in this job type to perform "pay in" and "pay out" transactions.

If you select **None**, the POS will not allow staff members to perform "pay in" and "pay out" transactions. If you select **Assigned Drawer**, the POS will allow a staff member to perform "pay in" and "pay out" transactions, but only if that staff member is assigned to a cash drawer. If you select **Any Drawer**, the POS will allow a staff member to perform "pay in" and "pay out" transactions on any physical cash drawer, even if that staff member is not assigned to the drawer.

**No Sale Permission**: This list enables you permit or restrict staff in this job type to perform "no sale" transactions.

If you select **None**, the POS will not allow staff members to perform "no sale" transactions. If you select **Assigned Drawer**, the POS will allow a staff member to perform "no sale" transactions, but only if that staff member is assigned to a cash drawer. If you select **Any Drawer**, the POS will allow a staff member to perform "no sale" transactions on any physical cash drawer, even if that staff member is not assigned to the drawer.

**Ignore Display Formats**: In this area, you can create a list of display formats that the POS will ignore when routing print jobs from transactions performed in this job type. You can use this to select one or more printers that will not print jobs from transactions performed by staff working in this job type.

The **Select a Display Formats** list includes all the display formats you have created in the Display Formats screen. If you select a display format, the program will add it to the list and display another **Select a Display Formats** list below it.

**Labor Category**: This list enables you to add the job type to a labor category, which is a group of job types that share the same hourly fixed cost. This list includes all of the labor categories you have created in the Labor Categories screen.

**Assigned Staff**: In this area, you can select the staff members that will work in this job type. If you add a staff member to this list, the POS will display that job type as an option when the staff member logs in.

The **Select a Staff** list includes all the staff records you have created in the Staff screen. If you select a staff member, the program will add the staff member to the list of assigned staff and display another **Select a Staff** list below it.

Each staff member in the list also includes a **Regular Rate** and **Overtime Rate** box. In the **Regular Rate** box, enter the staff member's hourly pay rate during regular hours. In the **Overtime Rate** box, enter the staff member's hourly pay rate during overtime hours.

# Labor Categories (Job Type Groups)

In the Labor Categories screen, you can define of job type groups, which is a group of job types that share the same hourly fixed cost.

**Name**: In this box, type a descriptive name for the job type group.

**Hourly Fixed Cost**: In the box, enter the hourly fixed cost for all the job types in this group.

**Assigned Job Types**. This list enables you to add multiple job types to the group. The list includes all of the job types you have created in the Job Types screen. If you select a job type in the list, the program will add another list below it.

# Scheduled Shifts

The Scheduled Shift screen includes controls that enable you to define scheduled shifts for job types or individual staff members. By defining scheduled shifts, you can set the POS to prevent staff members from logging into a shift before the time that the shift is scheduled to begin.

If you select a staff member in the **All Staff** list, the program will display all existing shifts for the selected staff member. If you select a job type in the **All Job Types** list, the program will display all existing shifts for the selected job type. To display shifts for all dates, click **All Dates**. To print a copy of all displayed shifts, click **Print**.

To add a new scheduled shift to the screen, click **New**. To delete an existing scheduled shift, click 🗑. To add a duplicate of an existing shift, select the shift's check box, then click 🗗.

In a new shift, if you click **Business Day**, the program will display a calendar panel, allowing you to select a specific date for the shift.

In the **Staff Member** list, you can select the staff member that will work the shift.

In the **Job Type** list, you can select the job type in which the staff member will work during this shift.

In the **Start Time** and **End Time** boxes, you can set the times of the day when the shift begins and ends.

# Permissions

The Permissions screen includes settings that enables you to create permission levels for groups of staff members. By defining permissions, you can select the functions that staff members can run in the POS. Permissions are set at the staff level, so you can only set one permission for each user.

**Name**: Enter a name for the set of permissions.

**Admin**: If you select this check box, staff members will have access to all current and future permissions that become available.

**All Discounts**: If you select this check box, staff members can add all current and future discounts to orders in the POS.

**Allowed Discounts**: If you do not select **All Discounts**, then you can use the **Allowed Discounts** lists to select the specific discounts that staff members can add to orders in the POS.

**All Adjustments**: If you select this check box, staff members can add all current and future adjustments to orders in the POS.

**Allowed Adjustments**: If you do not select **All Adjustments**, then you can use the **Allowed Adjustments** lists to select the specific discounts that staff members can add to orders in the POS.

**Apply Loyalty Rewards**: If you select this check box, staff members can add guest loyalty rewards to tickets in the POS.

**Void Orders**: If you select this check box, staff members can void or cancel tickets after they are sent to the kitchen, but before they are paid.

**House Account**: If you select this check box, staff members can use house accounts to tender a transaction.

**Remove Items**: If you select this check box, staff members can remove menu items from an order.

**Time Punch Management**: If you select this check box, staff members can access the time punch management feature and edit time punches of other staff members.

**Access Devices**: If you select this check box, staff members can change device prefixes if necessary.

**Access Printers**: If you select this check box, staff members can access the printer setup area of the POS.

**Change Auto-Logout**: If you select this check box, staff members can change the length of time that the app will wait before logging them out to the PIN screen.

**Access Daily Close**: If you select this check box, staff members can access the functions necessary to run the end-of-day process.

**View Closed Groups**: If you select this check box, staff members can view menu groups and menu sections that are not currently available based on their set date and times. Staff members will also be able to add items from those sections.

**Void Transactions**: If you select this check box, staff members can void or cancel tickets after they are sent to the kitchen, but before they are paid.

**Refunds**: If you select this check box, staff members can perform refunds in the POS.

**Move Items**: If you select this check box, staff members can move items from one ticket to another.

**Reprint Receipts**: If you select this check box, staff members can reprint receipts.

**Modify Server**: If you select this check box, staff members can change the server who currently owns a ticket.

**Modify Table**: If you select this check box, staff members can change the table assigned to a ticket.

**Show Expected Cash**: If you select this check box, staff members can view the expected cash amount in a cash drawer. If you clear this check box, staff members will be required to drop cash blindly.

**Edit Item Stock**: If you select this check box, staff members can change to available stock quantity of an item either in the menu item sections or in the Item Stock Management screen.

**Online Ordering**: If you select this check box, staff members can set the prep time and availability for online orders from within the POS.

**Force Offline Mode**: If you select this check box, staff members can place a device into Forced Offline Mode, which will automatically return offline approvals until the option is disabled. This feature is only applicable to locations using the BridgePay gateway. (This permission is usually only given to managerial staff.)

**Force Send Order**: If you select this check box, staff members can send a ticket, even if the credit card fails an additional authorization.

**Assign PINs and Cards**: If you select this check box, staff members can assign PINs and user cards to other staff from the POS.

**Kitchen Reprints**: If you select this check box, staff members can reprint kitchen slips.

**Enable Training Mode**: If you select this check box, staff members can enable and disable training mode on a tablet.

**Exempt Ticket Tax**: If you select this check box, staff members can use the **No Tax** option.

**Miscellaneous Items**: If you select this check box, staff members can access and order miscellaneous (open) menu items.

**Manage Tip Pools**: If you select this check box, staff members can distribute tips from tip pools to other staff members.

**Manual Tip Outs**: If you select this check box, staff members can manually tip out any amount, outside of configured tip out types.

**Unscheduled Clock In**: If you select this check box, staff members can clock in at any time, regardless of existing scheduled shifts.

**Split Checks**: If you select this check box, staff members can create new split checks.

**Transfer Credit Card**: If you select this check box, staff members can transfer a credit card from one ticket to another.

**Discard Order Changes**: If you select this check box, staff members can discard single items from a ticket, or an entire ticket.

**Assigned Staff**: In the **Assigned Staff** lists, you can select one or more staff members who will have the permissions in this permission set.

# Report Access

The **Report Access** tab allows you to create permission levels for staff members to access reports in the POS. Depending on the user, they may need access to all reports, or a limited subset of reports. Since report access permissions are set at the staff member level, each staff member can have access to only one set of report access permissions.

**Name**: In this box, enter a descriptive name for this set of report access settings.

**Sales**: If you select this check box, staff members will have access to the Sales Report.

**Labor**: If you select this check box, staff members will have access to the Labor Report.

**Payroll**: If you select this check box, staff members will have access to the Payroll Report.

**Loyalty**: If you select this check box, staff members will have access to the Loyalty Report.

**Gift**: If you select this check box, staff members will have access to the Gift Report.

**Assigned Staff**: In the **Assigned Staff** lists, you can select one or more staff members who will have access to the reports in this report access set.

# Break Types

In the Break Types screen, you can define staff break types, both paid and unpaid. In the POS, when staff members access the Staff Break screen, it will display the break defined in this screen as break options.

**Name**: In this box, type a descriptive name for the staff break.

**Paid**: If you are defining a paid break, select this check box. If you are defining a non-paid break, clear this check box. When an employee takes a break of this type, the POS will exclude the break's time from the employee's paid time.

**Minimum Length Required (in minutes)**: In this box, enter the number of minutes that an employee must work before earning access to this staff break. For instance, if you are defining a "10-minute break" that is accessible after two hours of work, type "120" in this box.

# Time Punches

The Time Punch screen enables you to manage time punches, records when a staff member clocks in and clocks out of a work shift. In this screen, you can edit time punches created by staff in the POS or create time punches to resolve errors or overlooked logging that may have occurred at the POS.

**Staff Member**: In this list, select the staff member for whom you area creating the time punch.

**Job Type**: If the staff member is associated with more than one job type, select the job type for the shift that this time punch will apply to.

**Tip Amount**: If applicable, enter the amount of the tip that the staff member should receive for this shift.

**Clock-In Date**: If you select this box, the program will display a calendar panel. In this panel, select the date when the time punch begins.

**Clock-In Time**: In this box, type the time of day when the time punch begins.

**Clock-Out Date**: If you select this box, the program will display a calendar panel. In this panel, select the date when the time punch ends.

**Clock-Out Time**: In this box, type the time of day when the time punch ends.

# Clock In Messages

The Clock-In Messages screen enables you to create one or more messages that the POS will display to staff members when they clock in. You can create different messages to display to different staff members, messages that only display during a specific range of days, and messages that display to all staff members, all staff members within a job type, or individual staff members.

**Start Date**: If you select this box, the program will display a calendar panel. In this panel, select the date of the first day when the POS should start displaying this message to staff members. If you clear the box, the POS will start displaying the message on the current day.

**End Date**: If you select this box, the program will display a calendar panel. In this panel, select the date of the last day that the POS should display this message to staff members. If you clear the box, the POS will display the message every day indefinitely.

**Type**: In this list, you can select the group that will receive this message. If you select **Everyone**, the POS will display the message to all staff members when they log in.

If you select **Job Type**, the program will display the **Job Type** list, and the POS will only display the message to staff members logging in to work in the job type you select in the **Job Type** list.

If you select **Staff Member**, the program will display the **Staff Member** list, and the POS will only display the message to the staff member that you select in the **Staff Member** list.

**Subject**: In this box, enter appropriate text for the message's subject line.

**Message**: In this box, enter the full text of the message.

# Authorization Tablets

The Authorized Tablets tab displays the iPads that are currently (and formerly in use) within the location. There are five column headers to this page, with each showing important and relevant information about the device.

**Device Header**: The device column header displays three pieces of information:

**Device Name**: This the name of the device that has been configured in the Settings app of the iPad. We recommended to name the device something that is relevant to the operation of the device. An example would be naming the first cashier terminal "Cash 1".

**Device ID**: The device ID is an automatic ID number given to the iPad by the POS application when it is downloaded. Most of the time this information is not relevant to the reseller or end user. Occasionally you may use that ID as a troubleshooting tool.

**Prefix**: The prefix is the ticket prefix that is set on the iPad under the Tablets button in the app.

**Info Header**: The Info column header contains information about the communication settings of the app and iPad.

**IP Address**: The IP address shows the IP address that device is currently using at the moment on the network.

**SSID**: The SSID is the name of the network that the iPad is currently using. If the location is reporting a printing issue with a specific iPad (or iPads) checking here to ensure that the devices are all on the proper network is recommended.

**Server Priority**: This field tells you what the server priority level is set to on the iPad. Note that the highest number priority device will be the server for device synchronization, and print spooling for shared print jobs.

**Ethernet**: If Ethernet is shown beneath the Server Priority line, it indicates the device is connected via Ethernet as opposed to Wi-Fi.

**Version Header**: The version column header shows the device version information for the app, iOS, and iPad, as well as the time zone for the iPads. It is critical to ensure that each iPad is on the same app version, as running mismatched versions can result in data loss due to one device saving a ticket that has database fields that another does not.

**Activity Header**: The Activity column header shows the latest order placed and cloud communication time:

**Last Order**: This field shows the last date and time an order was placed from that device.

**Last Comm**: This field shows the last time the device communicated with our cloud server.

**Troubleshooting**

The troubleshooting page will give information that can be used for diagnostic purposes.  The page shows the number of files on the device, items waiting to upload, tickets, cash drawers, kitchen slips, item stock, drivers, time punches, messages, waitlist, and table combines.

While on the troubleshooting screen, the user can take screenshots from the iPad. The far right button will take a screenshot on the selected tablet and upload it to the troubleshooting page. Getting the screenshot to the current page may take a minute, and periodically refreshing will display the image name below the statistics with other screenshots or logs.

**Deleting Authorized Devices**

If you need to free up a license to add another permanent iPad to the location, you can delete one or more iPads by clicking delete next to the iPad that you wish to remove.

# Payment Terminals

The Payment Terminals screen enables you to set the IP address of each payment terminal used by the site.

**Name**: In this box, enter a descriptive name for the payment terminal.

**IP Address**: Enter the terminal's static IP address or reserved DHCP.

**Prompt for Tip**: If you select this check box, the terminal will prompt the customer to select a tip amount when it processes a credit card transaction.

# Printers

In the Printers screen, you can configure the settings of each printer used by the site.

**Name**: In this box, enter a descriptive name for the printer.

**IP Address**: Enter the terminal's IP address.

**Shared**: If you want this printer to receive and print jobs from multiple workstations, select this check box. The printer will receive jobs the server spool.

**Support Two Cash Drawers**: If the printer includes a splitter and you want to connect it to two cash drawers, select this check box. This setting enables the printer to run two cash drawers simultaneously for a single device.

**Use Buzzer**: If you select this check box, the printer will run a buzzer sound to alert staff members that it has received a print job.

**Brand**: In this list, select the brand of the printer you are configuring (**Star** or **Epson**).

**Type**: In this list, select the type or model of the printer you are configuring. If the printer's brand is Star, you can select the printer's type (**Thermal** or **Impact**). If the printer's brand is Epson, you can select the printer's model. Depending on which model you select, the program may display additional configuration settings.

**Line Display**: If the model features a USB connection and you wish to connect it to a line display device, select the type of line display device in this list.

**Support Weigh Scale**: If the printer is capable of communicating with a CAS PD-II weigh scale, you can set it to do so by selecting this check box.

**Mode**: If you care configuring an Epson label printer, you can set its cutting mode in this list. If you select **Cut**, the printer will automatically cut new labels after printing them. If you select **Tear or Peel**, the printer will not cut new labels after printing them.

# Display Formats

The Display Formats screen enables you to define display format records. These records enable you to configure how the printers on the site will print such documents as kitchen slips, receipts, and checks. You can associate display formats with specific kitchen groups, which enables you to route print jobs to any number of printers or KDS units throughout the restaurant.

**Name**: In this box, you can enter a descriptive name for the display format. This name usually describes what it is used for in the kitchen.

**Print Type**: In this list, you can select a print type for the display format. If you are defining a display format for kitchen slips and kitchen displays, select **Kitchen Slip**. If you are defining a display format for labels printed by an Epson L90 (for pizza boxes for coffee cups), select **Kitchen Label**. If you are defining a display format for item prices printed as UPC barcodes, select **UPC**.

**Header Font**: In this list, select a font for the document's header text.

**Font Size**: In this list, select a size for the font of the document's text.

**Top Margin**: In this box, enter the number of empty lines that the program will use as each document's top margin.

**Bottom Margin**: In this box, enter the number of empty lines that the program will use as each document's bottom margin.

**Impact Font**: In this list, select a font for the document's impact text.

**Impact Font Size**: In this list, select a size for the font of the document's impact text.

**Hide Separator Lines**: If you select this check box, the program will not include separator lines in printed tickets.

**Hide Default Size**: If you select this check box, the program will not print the default size of menu items in printed receipts.

**Item Sorting**: This list enables you to set how the POS sorts items in printed receipts. If you select **Kitchen Group**, the POS will sort menu items by their kitchen groups. If you select **Course/Seat**, the POS will sort menu items by their menu courses and then seat numbers. If you select **None**, the POS will not sort menu items, but will list them in the order win which they were ordered.

**Sub Item Sorting**: This list enables you to modify how the POS sorts subitems in kitchen slips and KDS displays. In this list, if you select **Sort as a Regular Item**, the POS will sort and list subitems with main menu items. If you select **Show Sub Items below Main Item**, the POS will group and list subitems below the main menu item that includes them. If you select **Sort Sub Items as Ingredients**, the POS will group and list subitems and ingredients together, below the main item that includes them.
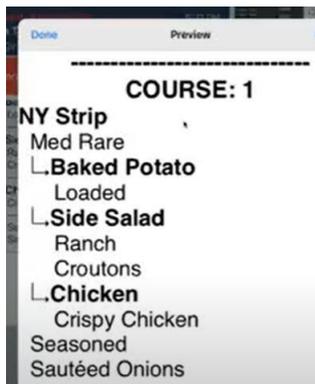
**Combine Subitems**: If you select this check box, the POS will sort subitems immediately beneath their associated main item.

**Duplicate Item Rollup**: This list enables you to set how the POS will print multiple duplicate items in a check. If you select **None**, the POS will print each duplicate item on its own single line. If you select **Enabled, If Same Seat**, the POS will print duplicate items ordered for a single customer (seat) as a single line with an updated quantity. If you select **Enabled, Ignore Seats**, the POS will print duplicate items on the entire check as a single line with an updated quantity.

**Order-Up Alerts**: This list enables you to set the POS to display an alert each time a ticket is removed from the kitchen display. If you select **None**, the POS will not fire an alert when tickets are removed (indicating the order is prepared).

If you select **Notify Staff In-App**, the POS will send an alert to the server who opened the ticket. The alert will display in the POS that the server is logged in. If you select **SMS Message Guest**, the POS will send a text. If you select **Both**, the POS will send an alert to the server who opened the ticket and send a text message to the customer associated with the ticket.

**Show Date & Time**: If you select this check box, the POS will include the time and date when the order was made when printing a ticket.

**Show Promised Time**: If you select this check box, the POS will include the date and time when the order should be delivered or picked up.

**Show Delivery Details**: If you select this check box, the POS will include the customer's information (such as the address and phone number) on the ticket, which can be useful on tickets for delivery orders.

**Show Format Name**: If you select this check box, the POS will include the name of the display format on the printed ticket.

**Show Reprint**: If you select this check box, the POS will include the label "REPRINT" on the ticket, along with the date and time of reprinted items on the ticket.

**Show Room Name**: This list enables you to set the POS to include the room name on tickets. If you select **Disabled**, the POS will not include the room's name on the ticket. If you select **Show**, the POS will include the name of the room on the ticket. If you select **Show in Red (Impact Only)**, the POS will include the name of the room on the ticket in red text, if the printer has the capability for impact text.

**Show Staff Name**: If you select this check box, the POS will include the name of the server who placed the order on the ticket.

**Show Table**: If you select this check box, the POS will include the table number associated with the ticket.

**Show Ticket #**: If you select this check box, the POS will include the ticket number on the ticket.

**Show Seats**: If you select this check box, the POS will include the seat number associated with each item on the ticket.

**Show Guest Count**: If you select this check box, the POS will include the guest count on the ticket.

**Print Voids**: If you select this check box, the POS will use this display format to print voided items or tickets.

**Show Paid Status**: This list enables you to set the POS to include text describing the status of partially paid orders hen printing prep slips or displaying orders in a KDS.

If you select **Disabled**, the POS will not include an order's payment status on prep slips or KDS displays. If you select **Show**, the POS will include each order's payment status on prep slips and KDS displays. If you select **Show in Red (Impact Only)**, the POS will print each order's payment status in red text, if the site is using impact printers.
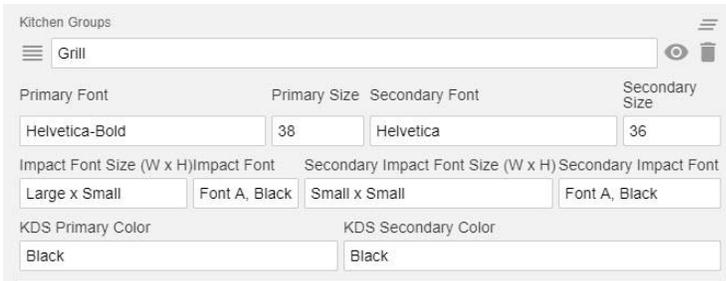
If you select **Show** or **Show in Red (Impact Only)**, the POS will then display the **Partially Paid Text** list. In this list, you can select the text that the POS uses to label partially paid orders. If you select **Partially Paid**, the POS will include "Partially Paid" on partially paid orders. If you select **Paid**, the POS will include "Paid" on partially paid orders. If you select **Unpaid**, the POS will include "Unpaid" on partially paid orders. The POS will include the text in header of printed prep slips and orders in the KDS display.



**On the Fly KDS**: This list enables you to set the POS to send orders to the KDS screen, and when they are sent. If you select **Disabled**, the POS will not send order information to the KDS until you tap **Send**. If you select **Delayed**, the POS will send a new item to the KDS only after you order another item or tap **Send**. If you select **Real-time**, the POS will send a new item to the KDS as soon as you add it to a check.

**Separate Kitchen Slips**: This list enables you to set the POS to print separate kitchen slips for different seats or items. If you select **Disabled**, the POS will not separate kitchen slips. If you select **By Seat**, the POS will print a separate ticket for each seat. If you select **By Item**, the POS will print a separate ticket for each item.

**Kitchen Groups**: In this list, you can associate the display format with a kitchen group. If you select a kitchen group in this list, the POS will display a set of rules that will determine how the POS will display ordered items from the kitchen group in printed tickets and order displays.

| Kitchen Groups | |
|---|---|
| ☰ Grill | 👁 🗑 |

| Primary Font | Primary Size | Secondary Font | Secondary Size |
|---|---|---|---|
| Helvetica-Bold | 38 | Helvetica | 36 |

| Impact Font Size (W x H) | Impact Font | Secondary Impact Font Size (W x H) | Secondary Impact Font |
|---|---|---|---|
| Large x Small | Font A, Black | Small x Small | Font A, Black |

| KDS Primary Color | KDS Secondary Color |
|---|---|
| Black | Black |

▶ **Primary Font**: In this list, select a font for primary text used for main menu items.

▶ **Primary Size**: In this list, select a size for primary text used for main menu items.

▶ **Secondary Font**: In this list, select a font for secondary text used for modifier items.

▶ **Secondary Size**: In this list, select a size for secondary text used for modifier items.

▶ **Impact Font Size**: In this list, select a size for impact text used for main menu items.

▶ **Impact Font**: In this list, select a font for impact text used for main menu items.

▶ **Secondary Impact Font Size**: In this list, select a size for impact text used for modifier items.

▶ **Secondary Impact Font**: In this list, select a font for impact text used for modifier items.

▶ **KDS Primary Color**: In this list, select a color for primary text used for main menu items displayed in kitchen display systems.

▶ **KDS Secondary Color**: In this list, select a color for secondary text used for modifier items displayed in kitchen display systems.

**Ignored Job Types**: These lists enable you to set the POS to not apply this display format to specific job types. If you select a job type in this list, the POS will not use this display format when printing jobs from staff members associated with the job type. If you select a job type in this list, the program will display another list, allowing you to select multiple lists.

**Required Kitchen Groups**: This list enables you to set the POS to require an item from a specific kitchen group before it applies this display format. If you select a kitchen group in this list, the POS will only use the display format if the ticket includes at least one menu item associated with the kitchen group.

# Customer Receipt

The Customer Receipt screen includes controls that enable you to configure the appearance and contents of the site's customer receipts.

**Set Black & White Logo**: This box enables you to add a black-and-white logo graphic to the top of printed receipts. If you click the box, the program opens a panel displaying the site's collection of uploaded graphic files. To add a new graphic to the collection, click **Upload New Image**. The program will open a browser window, allowing you to find and select a graphic on the network. After uploading the graphic to the collection, you can then select the graphic to add it to the receipt.

**Top Margin**: In this box, enter the number of empty lines that the program will use as each receipt's top margin.

**Bottom Margin**: In this box, enter the number of empty lines that the program will use as each receipt's bottom margin.

**Hide Separator Lines**: If you select this check box, the program will not include separator lines between modifiers in printed receipts.

**Roll Up Modifier Prices**: If you select this check box, the POS will add the prices of modifiers to the prices of their main items in printed receipts.

**Roll Up Discounts**: If you select this check box, the POS will roll up identical items, discounts, and adjustments on printed receipts. If a receipt includes any multiple identical items, discounts, or adjustments, the POS print those identical items on a single line with an updated quantity number.

**Modifiers**: This list enables you to set the POS to include or exclude modifier items from printed receipts. If you select **Show All**, the POS will include all modifier items on printed receipts. If you select **Hide All**, the POS will not include any modifier items on printed receipts. If you select **Hide $0.00**, the POS will only exclude modifier items priced at $0.00.

**Show Seat Details**: If you select this check box, the POS will print a receipt total for each seat on the receipt, not just a total for the entire receipt.

**Show Tax-Inclusive Details:** If you select this check box, the POS will include the "Tax Included" total on printed receipts. When the POS prints a receipt, it will include the total sales tax from all "Tax Included" items in the order on a separate line labeled "Tax Included". The POS prints this total below the existing "Tax:" line, which displays the total sales taxes from standard (tax-excluded) priced items. If the order does not include any "Tax Included" items, the POS print the "Tax Included" line with an amount of "$0.00".

```
2021-06-07, 1:48 PM      Ticket: L2
Server: Chelsea H
Dine In
                              Test
Invoice: 210606-02-2
-----------------------------------

 1 Classic Burger           4.00
    Single
    Fried Egg               1.00
    Grilled Jalapenos        .50

Subtotal                    5.50
7% Sales Tax                 .39
-----------------------------------
Total                       5.89

Tax included                 .00
-----------------------------------
Cash Tendered               5.89
Change                       .00
-----------------------------------
Balance Due                  .00
```

To define a tax-included item, access the Admin Console. In the Items screen, if you open an item's settings and select **Tax Included** in the **Tax** list, the POS will include the item's sales tax in its price.

**Body**: In this area, you can set the font and size of the body text of the site's receipts. In the **Font** list, select a font for the receipt's body text. In the **Size** list, select a size for the receipt's body text.

**Header Lines**: In this area, you can set the font and size of the header text of the site's receipts. In the **Text** box, enter the text of the header. If you require a second line of text, enter it in the box beneath the **Text** box. When the POS prints a receipt, it will print this text in the receipt's header.

In the **Font** list, select a font for the receipt's header text. In the **Size** list, select a size for the receipt's header text. In the alignment list, select an appropriate alignment for the header text (right, left, or center).

**Footer Lines**: In this area, you can set the font and size of the footer text of the site's receipts. In the **Text** box, enter the text of the footer. If you require a second line of text, enter it in the box beneath the **Text** box. When the POS prints a receipt, it will print this text in the receipt's footer.

In the **Font** list, select a font for the receipt's footer text. In the **Size** list, select a size for the receipt's footer text. In the alignment list, select an appropriate alignment for the footer text (right, left, or center).

# Account Menu

## Items

**Items** displays a list of your menu items.

### Search

If you don't see the item you need on screen, type the name in the search box, select the item under the **Item** heading, and the record displays; from here you can view the item's specifics and make changes.

### Filters

The **Items** screen allows you to filter alphabetically by **Item** and by **Location, Short Name, Report Category,** and **Price** by clicking on the headings.

### Show/Hide Account Items

Click to toggle between displaying or hiding all available menu items (the default view shows enabled items). Clicking the **Show Account Items** button switches to a hide view with a blue

box to the left of each item. Unchecking the box removes the individual item from the menu at that location. For example, Bombay Sapphire is currently on the menu. When you uncheck the box a message displays to **Remove from this location**. The item is still in your database, but not currently being offered at this location. At any time, checking the box adds it back.

| Q bombay | ✕ | | SHOW ACCOUNT ITEMS | NEW |
|---|---|---|---|---|

| Item ▲ | Short Name | Report Category | Price |
|---|---|---|---|
| Bombay Sapphire | | Liquor | 0.00 |

| Item ▲ | Short Name | Report Category | Price |
|---|---|---|---|
| ☑ REMOVE FROM THIS LOCATION | | Liquor | 0.00 |

| Q Search | | | HIDE ACCOUNT ITEMS | NEW |
|---|---|---|---|---|

| Item ▲ | Short Name | Report Category | Price |
|---|---|---|---|
| ☑ 1554 | | Beer | 7.00 |
| ☑ 2 - 2nd Anniversary Brut IPA | | Beer | 8.00 |
| ☑ 666: Sympathy For The Devil | | Beer | 7.00 |
| ☑ 90 Minute Imperial IPA | | Beer | 6.75 |
| ☑ Absolut | | Liquor | 0.00 |
| ☑ Agave Wheat | | | 5.00 |
| ☑ Amaretto Sour | | Liquor | 6.00 |
| ☑ Andromeda | | Beer | 6.50 |
| ☑ Angels Envy | | Liquor | 0.00 |
| ☑ Arberlour 12 yr | | Liquor | 0.00 |
| ☑ Axis Mundi | | Beer | 6.50 |
| ☑ Bacardi Silver | | Liquor | 0.00 |
| ☑ Bacchus | | Beer | 11.75 |
| ☑ Barrel Aged Dark - Madeira | | Beer | 8.00 |
| ☑ BBA The Devil's Mark | | Beer | 9.25 |
| ☑ Bell's Two Hearted | | Beer | 0.00 |
| ☑ Birthday Bomb! | | Beer | 9.00 |
| ☑ Blue Moon | | Beer | 0.00 |
| ☐ Bombay Sapphire | | Liquor | 0.00 |
| ☑ Bourbon Barrel Aged Cocoa Nibbler | | Beer | 8.00 |

# New

Click the **New** button to add a new item to the menu. All fields are optional unless indicated.

**Set Image:** Selecting the **Set Image** box allows you to upload an image for the item. You'll be able to name the image and resize it if necessary.

**Name:** Type a name for the menu item. This is a required field.

**Short Name:** If an item has a longer name (e.g. Build Your Own Burger), you might want to give it a short name like BYOB or if you have staff members that speak different languages (for example, some native English speakers and some native Spanish speakers) you can set the item record so the main **Name** field appears in one language and the **Short Name** field appears in the other language.

**Description:** Type a description of the menu item.

**SKU/Lookup:** If you use SKU or Lookup numbers for your inventory, they can be entered in this field.

**Price:** Enter the menu price of the item.

**Cost:** Enter the cost of the item. If the item has sizes (e.g. small, medium, large), then the individual size costs below will be used for reporting instead.

**Taxable:** In this list, select the item's taxable status. If the item will include sales tax, select **Taxable**. If the item is exempt from sales tax, select **Tax Exempt**. If the item's price includes its sales tax, select **Tax Included**.

**Non-Revenue:** Check the box in the field to set the item as a non-revenue item for reporting purposes.

**Measurement:** Click in the field to choose from: **Not Measured, Per Unit, Weighted Per Pound, Weighted Per Ounce,** or **Per Minute**. Note that Per Ounce and Per Pound measurements can be used in conjunction with a weight scale while Per Minute starts a timer when the item is rung up and calculates the final price upon stopping the timer.

**Default Course:** If your restaurant uses courses, you can indicate here if the menu item is served as part of a specific course.

**Prevent Discounts:** Check the box in the field to restrict this item from having its price changed via a discount or adjustment.

**Misc. Item:** Check the box in the field to set the item so it's individually customizable in the POS for special cases. This option could be used for open pricing on an item. When it's selected, it prompts the user to input a custom price.

**Hide on Receipt:** Check the box in the field so the item's name and price is hidden on customer receipts. Note that the price must be zero for this setting to work.

**Stored Value:** Click in the field to choose from **Disable, Gift Card,** or **Account Payment**. Note that this allows the item to be loaded with funds as a gift card sale or for paying off a house account with an outstanding balance (requires MobileBytes Gift).

**Tippable:** Check the box in the field if you want the item's sales to contribute service charges, auto-gratuities, and suggested tip amounts.

**Separate Seats:** You can check the box in the field if you want to use this option along with the **Separate Kitchen Slips** room and display format options to make the item always print on its own individual slip.

**Prompt for Quantity:** Sets the item to prompt for a quantity selection when rung up in the POS. Example: How many chicken wings.

**Entrée:** Check the box in the field to show the entree count on the **Info** screen of the ticket and can be set to print on customer receipts. Leaving the option disabled if entrée reporting is not relevant to your business model.

**Half & Half Pricing:** Click in the field to choose from **None, Most Expensive Half,** or **Step Pricing**. Note that this only applies to modifiers configured as Half & Half. **Step Pricing** is to

charge for the first half ingredient, but not the second, then charge for the third, but not the fourth, and so on.

**Report Category:** Click in the field to choose from a **Report Category**. For example, Liquor, Wine, Beer, Food.

**Kitchen Group:** Click in the field to choose from a **Kitchen Group**. For example, Alcohol, Dessert, Grill.

**Tags:** Click in the field to choose from **Tags**. For example, Alcohol, Beer, Food, Happy Hour, Liquor.

**Attributes:** Type or select an attribute in the field.

**Sizes:** Click in the field to choose from **Sizes**. For example, 10oz, 16oz, 8 Piece, Small, Medium, Large.

▸ You have the ability to arrange the sizes in the order you would like to see them on the POS by using the 4 lines to the left of the Size Name, you can do this by clicking and dragging the size to the order of your liking.

▸ In the **Price** field you have to set the price for the size you selected. The Price you input overrides the price set above.

▸ In the **Cost** field you have the option to set the cost of the size you selected.  The Cost you input overrides the cost set above.

▸ If **Default** is selected the POS defaults to this size when the item is added to a ticket on the POS. You can change the size of the item on the POS when needed.



**Sections:** Click in the field to choose **Sections**. For example, Drinks, Grill, Pizza.

**Modifiers:** Click in the field to choose **Modifiers**. For example, Fountain Drinks, Sandwich Toppings, Pizza Toppings. Multiple **Modifiers** can be selected for one item.

▸ After you select a Modifier you will see each Ingredient listed below.

▸ You have the option to select any of the Ingredients listed under the Modifier. The Ingredients selected indicate that these are default Ingredients on the item. Default Ingredients do not print to the kitchen or show on the KDS. Default Ingredients do not

come with an extra charge if a price was given to the ingredient when the Modifier was created.

▸ To the right of the Ingredient Name there's an icon that looks like a computer; if you select this icon, it disables this specific ingredient from Online Ordering.

▸ You will see the computer and phone icon to the right of the modifier; selecting it disables the entire modifier on this item from being ordered online.
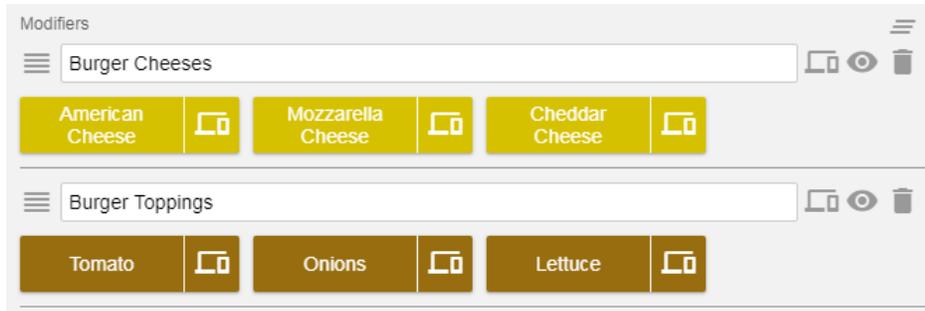


**Override Button Cover:** Click to choose one of the pre-set colors or choose a color then click the box in the top right corner and use the white circle and slider tool to customize the color.



**Use Specific Hours:** Check the box in the field to make the item unavailable outside of specified hours. For example, you want to make an item only available to order after 11AM. Checking the box unhides the **Specific Hours** field.

**Specific Hours:** Click in the field to select a specific day(s) of the week. Choosing a day unhides **Start Time** and **End Time** boxes to enter a start and end time. You can customize each day of the week, if desired.

**Available Online:** Check the box in the field to allow customers to see the item online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the item on the Kiosk or Skip the Line.

# Save

    Once you've finished creating a new item, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing item, click the item and the current record displays. Use the field descriptions above for details on the fields. The record contains the following buttons at the bottom:

**Create New:** Click to create a new item.

**Duplicate:** Click to duplicate the existing item. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

**Delete:** Click to delete the item.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing item, click the **Save** symbol in the bottom right corner to save your changes.

# Sections

**Sections** displays a list of similarly grouped menu items. For example, Appetizers, Lunch Combos, Cocktails.

## Search

If you don't see the section you need on screen, type the name in the search box, select the section under the **Section** heading, and the record displays; from here you can view the section's specifics and make changes.

## Show/Hide Account Sections

Click to toggle between displaying and hiding all sections (the default view shows enabled sections). Clicking the **Show Account Sections** button switches to a hide view with a blue box to the left of each section. Unchecking the box removes the individual sections at that location.

When you uncheck the box a message displays to **Remove from this location**. The section is still in your database, but not currently available at this location. At any time, checking the box adds it back.

## Filters

The **Sections** screen allows you to filter alphabetically by **Section** and **Location** by clicking on the headings.

## New

Click the **New** button to add a new Section to the menu. All fields are optional unless indicated.

**Name:** Type a name for the section. This is a required field.

**Menu Groups:** Click in the field to choose from a menu group(s). For example, Food, Beverage, Gift Certificate. Your new section can have one or multiple menu groups. Use the trash can symbol to delete a menu group.

**Assigned Items:** Click in the field to add a menu **Item(s)** to the new **Section**. For example, if you add a new section called Specials, you might choose to add items like an XL Pizza 3 Toppings and/or a Daily Double Small. Use the trash can symbol to delete an assigned item.

**Use Specific Hours:** Check the box in the field to make the item unavailable outside of specified hours. For example, you want to make an item only available to order after 11AM. Checking the box unhides the **Specific Hours** field.

**Specific Hours:** Click in the field to select a specific day(s) of the week. Choosing a day unhides **Start Time** and **End Time** boxes to enter a start and end time. You can customize each day of the week, if desired.

**Available Online:** Check the box in the field to allow customers to see the section online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the section on the Kiosk or Skip the Line.

## Save

Once you've finished creating a new size, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing section, click the section and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new section.

**Duplicate:** Click to duplicate the existing section. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

**Delete:** Click to delete the section.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing section, click to save your changes.

# Groups

**Menu Groups** have a start and end date which is useful for features like special menus, seasonal menus, or holiday menus. For example, a restaurant might offer a Valentine's Day menu for the whole month of February or a rotating seasonal menu. Having the functionality to set a start and end date allows the system to only offer that menu for a specific time period.

## Search

If you don't see the **Group** you need on screen, type the name in the search box, select the group under the **Group** heading, and the record displays; from here you can view the Group's specifics and make changes.

## Filters

The **Groups** screen allows you to filter alphabetically by clicking on the heading.

## Edit Sort Order

Click the button to edit the sort order, then click the **Save** icon in the bottom right corner to save your changes.

# Show/Hide Deleted Groups

Click the button to toggle between displaying and hiding a list of previously deleted **Groups**.

# Show/Hide Account Groups

Click the button to toggle between displaying and hiding menu groups (the default view shows enabled groups). Clicking the **Show Account Groups** button switches to a hide view with a blue box to the left of each group. Unchecking the box removes the individual group at that location. When you uncheck the box a message displays to **Remove from this location**. The group is still in your database, but not currently available at this location. At any time, checking the box adds it back.

# New

Click the **New** button to add a new Menu Group to the menu. All fields are optional unless indicated.

**Name:** Type a name for the Group. This is a required field.

**Start Date:** Click in the field and the calendar displays allowing you to choose the month, day, and year to begin offering the group. For example, you might want to start offering a Valentine's Day menu group on February 1.

**End Date:** Click in the field and the calendar displays allowing you to choose the month, day, and year to stop offering that group. For example, the last day you want to offer the Valentine's Day menu group is February 29.

**Use Specific Hours (POS Only):** Check the box in the field to make the item unavailable outside of specified hours. For example, you want to make an item only available to order after 11AM. Checking the box unhides the **Specific Hours** field.

**Specific Hours:** Click in the field to select a specific day(s) of the week. Choosing a day unhides the **Start Time** and **End Time** boxes to enter a start and end time. You can customize each day of the week, if desired.

**Assigned Sections:** Click in the field to add a **Section(s)** to the new **Group**. Use the trash can symbol to delete an assigned section.

**Available Online:** Check the box in the field to allow customers to see the group online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the group on the Kiosk or Skip the Line.

## Save

Once you've finished creating a new group, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing group, click the group and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new group.

**Duplicate:** Click to duplicate the existing group. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

**Audit Trail:** Click to view the audit trail and see changes made to the record.

**Delete:** Click to delete the group.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing group, click to save your changes.

# Sizes

**Sizes** are used when an item comes in more than one size. They can be set by descriptors like small, medium, and large or by inches like 10", 12"; both work well for pizza. Sizes can be pieces like a 10 piece or a 16 piece order of wings or by ounces like an 8 oz. or 12 oz. steak. You could offer wine by the glass or by the bottle, and so on. You can create the **Sizes** that work best for your business.

# Search

If you don't see the **Size** you need, type the name in the search box, select the size under the **Size** heading, and the record displays; from here you can view the size's specifics and make changes.

# Filters

The **Sizes** screen allows you to filter alphabetically by size by clicking on the heading.

# Show/Hide Deleted Sizes

Click the button to toggle between displaying and hiding a list of previously deleted **Sizes**.

# Show/Hide Account Sizes

Click the button to toggle between displaying and hiding sizes (the default view shows enabled sizes). Clicking the **Show Account Sizes** button switches to a hide view with a blue box to the left of each size. Unchecking the box removes the individual size at that location. When you uncheck the box a message displays to **Remove from this location**. The size is still in your database, but not currently available at this location. At any time, checking the box adds it back.

# New

Click the **New** button to add a new Size to the menu. All fields are optional unless indicated.

**Name:** Type a name for the new Size. This is a required field.

**Short Name:** If an item has a longer name (e.g. Small Soft Serve Ice Cream Cone), you might want to give it a short name like Sm Cone or if you have staff members that speak different languages (for example, some native English speakers and some native Spanish speakers) you can set the ingredient record so the main **Name** field appears in one language and the **Short Name** field appears in the other language.

**Assigned Items:** Click in the field to add a menu **Item(s)** to the new **Size**. For example, if you add a new Size called Large, you might add multiple items like Coffee, Milk, and Juice. Use the trash can symbol to delete an assigned item.

**Available Online:** Check the box in the field to allow customers to see the size online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the size on the Kiosk or Skip the Line.

## Save

Once you've finished creating a new size, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing size, click the size and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:**  Click to create a new size.

**Duplicate:** Click to duplicate the existing size. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

**Delete:** Click to delete the size.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:**  Once you've finished making changes to an existing size, click to save your changes.

# Attributes

**Attributes** are descriptive terms that define the quality and characteristic of a menu item(s). For example, Award Winning, Contains Peanuts, Gluten Free, Vegetarian, Kosher, Hot, Mild, Spicy…

# Search

If you don't see the **Attribute** you need on screen, type the name in the search box, select the attribute under the **Attribute** heading, and the record displays; from here you can view the attribute's specifics and make changes.

# Filters

The **Attributes** screen allows you to filter alphabetically by clicking on the heading.

# Edit Sort Order

Click the button to edit the sort order, then click the **Save** icon in the bottom right corner to save your changes.

# Show/Hide Account Attributes

Click the button to toggle between displaying and hiding attributes (the default view shows enabled attributes). Clicking the **Show Account Attributes** button switches to a hide view with a blue box to the left of each attribute. Unchecking the box removes the individual attribute at that location. When you uncheck the box a message displays to **Remove from this location**. The size is still in your database, but not currently available at this location. At any time, checking the box adds it back.

# New

Click the **New** button to add a new attribute to the menu. All fields are optional unless indicated.

**Set Image:** Selecting the **Set Icon** box allows you to choose from a group of preset attribute images. Click the **+** sign in the bottom left corner to upload your own image.

**Name:** Type a name for the new attribute. This is a required field.

**Available Online:** Check the box in the field to allow customers to see the attribute online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the attribute on the Kiosk or Skip the Line.

# Save

 Once you've finished creating a new attribute, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing attribute, click the attribute and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new attribute.

**Duplicate:** Click to duplicate the existing attribute. This is a good time-saving feature.

**Delete:** Click to delete the attribute.

**Remove From This Location:** Click to remove the attribute from this location.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing attribute, click to save your changes.

# Kitchen Groups

**Kitchen Groups** are created to group items together for a display format which determines where the item prints. For example, Bar, Grill, Salad Bar, Dessert Bar, and Sushi. Your business setup may include separate printers like a Grill printer to notify staff working that section that an order has been placed.

## Search

If you don't see the **Kitchen Group** you need on screen, type the name in the search box, select the kitchen group under the **Kitchen Group** heading, and the record displays; from here you can view the kitchen group's specifics and make changes.

## Filters

The **Kitchen Group** screen allows you to filter alphabetically by clicking on the heading.

# New

Click the **New** button to add a new kitchen group to the menu. All fields are optional unless indicated.

**Name:** Type a name for the new kitchen group. This is a required field.

**Assigned Items:** Click in the field to add a menu **Item(s)** to the new **Kitchen Group**. For example, if you add a new kitchen group called Dessert Bar, you might choose to add items like Cookies, Brownies, and Death By Chocolate Cake. Use the trash can symbol to delete an assigned item.

# Save

Once you've finished creating a new kitchen group, click the **Save** symbol in the bottom right corner to save your changes.

# Editing

To edit an existing kitchen group, click the group and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new kitchen.

**Delete:** Click to delete the kitchen group.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing kitchen group, click to save your changes.

# Report Categories

**Report Categories** are used to group related menu items to allow customized reporting. For example, you might group menu items into larger categories like Alcohol, Beverages, Desserts, Burgers and sandwiches to better understand if certain menu items sell, when they sell the most, and at what quantity.

## Search

If you don't see the **Report Category** you need on screen, type the name in the search box, select the report category under the **Report Category** heading, and the record displays; from here you can view the report category's specifics and make changes.

## Filters

The **Report Category** screen allows you to filter alphabetically by clicking on the heading.

## New

Click the **New** button to add a new report category. All fields are optional unless indicated.

**Name:** Type a name for the new report category. This is a required field.

**Assigned Items:** Click in the field to add a menu **Item(s)** to the new **Report Category**. For example, if you add a new report category called Beverages, you might choose to add all non-alcohol beverage items like Fountain Soda, Tea, and Coffee. Use the trash can symbol to delete an assigned item.

## Save

Once you've finished creating a new report category, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit a report category, click the report category and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new report category.

**Delete:** Click to delete the report category.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing report category, click to save your changes.

# Daypart Categories

**Daypart Categories** are used to differentiate between different service times of the day. For example, Breakfast, Lunch, and Dinner.

## Search

If you don't see the **Daypart Category** you need on screen, type the name in the search box, select the daypart category under the **Daypart Category** heading, and the record displays; from here you can view the daypart category's specifics and make changes.

## Filters

The **Daypart Category** screen allows you to filter alphabetically by clicking on the heading.

## New

Click the **New** button to add a new daypart category. All fields are optional unless indicated.

**Name:** Type a name for the new daypart category. This is a required field.

## Save

Once you've finished creating a new daypart category, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit a daypart category, click the daypart category and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new daypart category.

**Delete:** Click to delete the daypart category.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing daypart category, click to save your changes.

# Revenue Centers

**Revenue Centers** are areas or your business that generate sales. For example, you might offer Bottle Service, Carry Out, Delivery, and Dine In.

## Search

If you don't see the revenue center you need on screen, type the name in the search box, select the revenue center under the **Revenue Center** heading, and the record displays; from here you can view the revenue center's specifics and make changes.

## Filters

The **Revenue Center's** screen allows you to filter alphabetically by clicking on the heading.

## New

Click the **New** button to add a new revenue center. All fields are optional unless indicated.

**Name:** Type a name for the new revenue center. This is a required field.

## Save

Once you've finished creating a new revenue center, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit a revenue center, click the revenue center and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new revenue center.

**Delete:** Click to delete the revenue center.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing revenue center, click to save your changes.

# Modifiers

**Modifiers** indicate variations in a menu item. For example, different margarita flavors like lime, strawberry, and peach; a choice of a margarita rim with sugar or salt, wing sauces, or pizza sauces.

## Search

If you don't see the modifier you need on screen, type the name in the search box, select the modifier under the **Modifier** heading, and the record displays; from here you can view the modifier's specifics and make changes.

## Filters

The **Modifier** screen allows you to filter alphabetically by **Modifier** and **Location;** as well as filtering from highest to lowest using the **Minimum, Maximum,** and **Num. Included** headings.

## Show/Hide Deleted Groups

Click the button to toggle between displaying and hiding a list of previously deleted **Modifier**.

## New

Click the **New** button to add a new modifier to the menu. All fields are optional unless indicated.

**Name:** Type a name for the modifier. This is a required field.

**Show Modifier Name:** Click in the field to choose from **Disabled, Ticket Screen, Kitchen,** or **Both**. If enabled, this determines where the modifier's name should be displayed along with its ingredients in the POS.

**Minimum Choices:** Type the minimum number of choices for this modifier.

**Maximum Choices:** Type the maximum number of choices for this modifier.

**Number of Included Ingredients:** Enter the number of ingredients that can be added with no additional cost. Note that the Default-On ingredients are already included and won't count toward this number.

**Allow Half & Half:** Check the box in the field to allow ingredients in this modifier to be added as half ingredients that allow for advanced pricing options. Checking the box unhides the **Multiplier** field.

**Multiplier:** Enter the ingredient price if ordered as half. For example, if you want to make half an ingredient half price, enter 0.5 in the field.

**Allow Duplicate Ingredients:** Check the box in the field to allow ingredients in this multiplier to be ordered more than once. Note that this feature requires you to make the **Maximum Choices** field above greater than 1 and this feature cannot be used with Half & Half functionality.

**Allow Substitutes:** Check the box in the field to allow substitutions. Note that removing a default ingredient allows for adding a different ingredient at no cost.

**Button Cover:** Click to choose one of the pre-set colors or choose a color then click the box in the top-right corner and use the white circle and slider tool to customize the color.
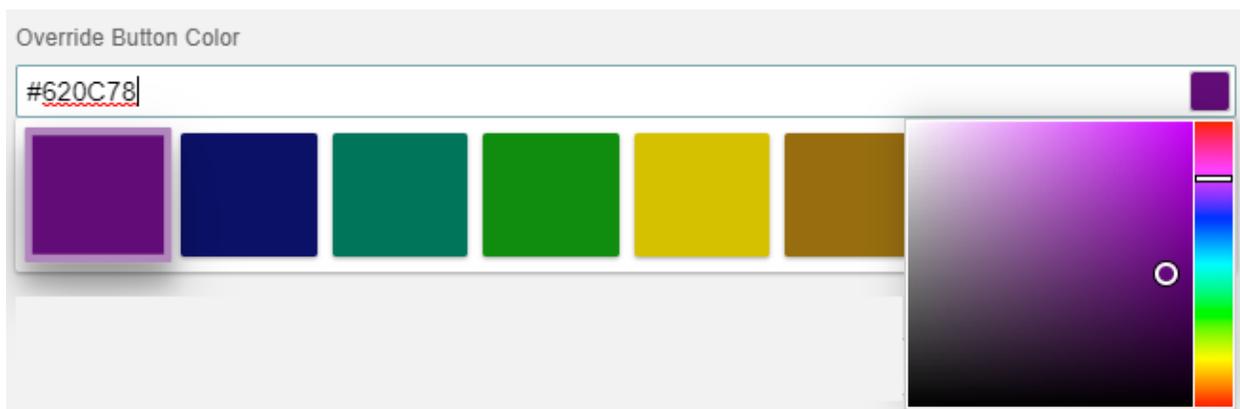


**Ingredients:** Click in the field to select one or more ingredients for this modifier. Use the trash can symbol to delete an ingredient.

  ‣ The 4 lines on the left allow you to click and drag the Ingredients in the order you would like them to appear on the POS within the Modifier.

  ‣ **Default Price** allows you to set the standard price to charge for this Ingredient.

  ‣ **Size Pricing** allows you to set a standard price for this Ingredient based on what size is selected for the Item this Modifier is assigned to if the Item has Size Choices. You can change between the size options by clicking on the size that is listed above the Size Price field.

‣ **Override** allows you to select a different Kitchen Group if this Ingredient needs to be printed to a different printer or KDS.

Ingredients

| | ▲ Name | Default Price | ▾ 10" | Override | | |
|---|---|---|---|---|---|---|
| ☰ | American Cheese | 1.00 | Size Price | Kitchen Group | 👁 | 🗑 |
| ☰ | Mozzarella Cheese | 1.00 | Size Price | Kitchen Group | 👁 | 🗑 |
| ☰ | Cheddar Cheese | 1.00 | Size Price | Kitchen Group | 👁 | 🗑 |

Create or Select a Ingredient

**Assigned Items:** Click in the field to assign one or more menu items to this modifier. Use the trash can symbol to delete an assigned item.

**Available Online:** Check the box in the field to allow customers to see the modifier online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the modifier on the Kiosk or Skip the Line.

# Save

Once you've finished creating a new modifier, click the **Save** symbol in the bottom right corner to save your changes.

# Editing

To edit an existing modifier, click the modifier and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new modifier.

**Duplicate:** Click to duplicate the existing modifier. This is a good time-saving feature.

**Delete:** Click to delete the modifier.

**Remove From This Location:** Click to remove the modifier from this location.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing modifier, click to save your changes.

# Ingredients

**Ingredients** are the individual items that make up your business's recipes. Some Ingredients may be the same as your menu Items. For example, bacon might be an Item on your menu, but it's also an Ingredient in other dishes; whereas you might have a bacon cheeseburger on the menu, the bacon cheeseburger is a menu Item, but it's **not** an Ingredient.

## Search

If you don't see the **Ingredient** you need on screen, type the name in the search box, select the ingredient under the **Ingredient** heading, and the record displays; from here you can view the ingredient's specifics and make changes.

## Filters

The **Ingredients** screen allows you to filter alphabetically by **Ingredient** and by **Location**.

## Show/Hide Deleted Ingredients

Click the button to toggle between displaying and hiding a list of previously deleted **Ingredients.**

## New

Click the **New** button to add a new ingredient to the menu. All fields are optional unless indicated.

**Set Image:** Selecting the **Set Image** box allows you to add an image for an ingredient. Click the **+** sign in the bottom left corner to upload an image. Note that this is only for Kiosk, Skip the Line, and Online Ordering.

**Name:** Type a name for the new ingredient. This is a required field.

**Short Name:** If an ingredient has a longer name (e.g. Mozzarella), you might want to give it a short name like Mozza or if you have staff members that speak different languages (for example, some native English speakers and some native Spanish speakers) you can set the ingredient record so the main **Name** field appears in one language and the **Short Name** field appears in the other language.

**Image Display:** In this list, you can select which apps will display the image in its Ingredients window. You can select Online Ordering, Guest App, and Kiosk. If you select one or more of these apps, they will display the uploaded images on the ingredients buttons.

**Sub Item:** Click in the field to choose an item that can be substituted for this ingredient.

**Assigned Modifiers:** Click in the field to add a **Modifier (s**) to the new **Ingredient**. Use the trash can symbol to delete an assigned modifier.

**Available Online:** Check the box in the field to allow customers to see the ingredient online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the ingredient on the Kiosk or Skip the Line.

# Save

Once you've finished creating a new ingredient, click the **Save** symbol in the bottom right corner to save your changes.

# Editing

To edit an existing ingredient, click the ingredient and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Duplicate:** Click to duplicate the existing ingredient. This is a good time-saving feature.

**Delete:** Click to delete the ingredient.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing ingredient, click to save your changes.

# Context Items

**Context Items** are variable changes that can be performed on a menu Item. For example, Extra, On Side, On Top, Substitute.

## Search

If you don't see the **Context Item** you need on screen, type the name in the search box, select the context item under the **Context Item** heading, and the record displays; from here you can view the ingredient's specifics and make changes

## Filters

The **Context Items** screen allows you to filter alphabetically by **Ingredient** and by **Location**.

## New

Click the **New** button to add a new context item. All fields are optional unless indicated.

**Name:** Type a name for the new context item. This is a required field.

**Short Name:** If a context item has a longer name (e.g. Double), you might want to give it a short name like 2X or if you have staff members that speak different languages (for example, some native English speakers and some native Spanish speakers) you can set the context items record so the main **Name** field appears in one language and the **Short Name** field appears in the other language.

**Ingredients:** Click in the field to add an **Ingredient(s)** to the new **Context Item**. Use the trash can symbol to delete an ingredient.

**Available Online:** Check the box in the field to allow customers to see the context item online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see the context item on the Kiosk or Skip the Line.

# Save

Once you've finished creating a new context item, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing context item, click the context item and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

 **Create New:**  Click to create a new context item.

 **Duplicate:** Click to duplicate the existing context item. This is a good time-saving feature.

 **Delete:** Click to delete the context item.

 **Remove From This Location:** Click to remove the context item from this location.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

 **Save:**  Once you've finished making changes to an existing context item, click to save your changes.

# Taxes

**Taxes** are the state tax percentage on goods and services your business offers. For example, Alcohol Tax, Food Tax, Rental Tax, Retail Tax.

Click the **New** button to add a new tax to the menu. All fields are optional unless indicated.

**Name:** Type a name for the new tax. This is a required field.

**Default Amount:** Enter the percentage amount of the tax as a decimal. For example, if the state's alcohol tax is 7% enter 7.0.

**Round Down Bracket Start:** Enter the start of the round down range as a decimal. Non-whole dollar totals with cents that fall in this range will round down the resulting tax amount. All tax amounts from totals falling outside the range are rounded up.

For Florida General Sales Tax, this should be "0.01", conforming to Florida's Common Sales Tax Brackets.

**Round Down Bracket End:** Enter the end of the round down range. Non-whole dollar totals with cents that fall in this range will round down the resulting tax amount. All tax amounts from totals falling outside the range are rounded up.

For Florida General Sales Tax, this should be "0.09", conforming to Florida's [Common Sales Tax Brackets](). .

**Repeating Brackets:** Check the box in the field to allow repeating brackets. If repeating, the tax will round down every time the taxable total falls in the bracket cents range. Otherwise only the first time. Florida uses repeating brackets.

# Tax Groups

Tax groups allow multiple taxes to be rolled up into a single tax line when presented to the customer. Click the **CREATE A TAX GROUP** button to create a new tax group.

**Name:** Enter the name of the tax group.

**Tax Rates:** Click in the field to select a tax rate.

# Tags

**Tags** are used to make associations between menu items and certain operational features. For example, discounts can be applied to Items with specific tags. Tags can also be used to apply taxes at the room-level.

Click the **New** button to add a new tag to the menu. All fields are optional unless indicated.

**Name:** Type a name for the new tag. This is a required field.

**Tag Color:** Click to choose one of the pre-set colors or choose a color then click the box in the top-right corner and use the white circle and slider tool to customize the color.
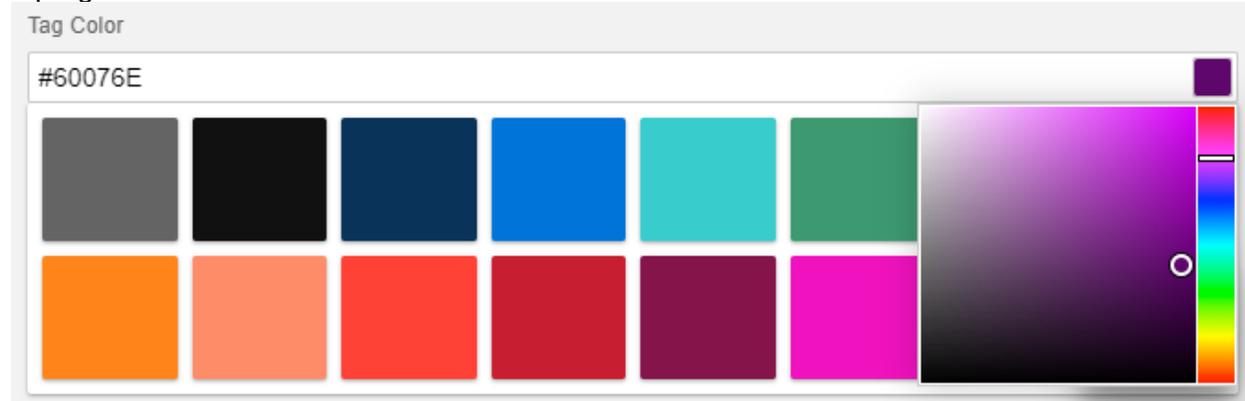


**Assigned Items:** Click in the field to assign one or more menu items to this tag. Use the trash can symbol to delete an assigned item.

# Pricing

**Pricing:** Pricing allows you to set custom pricing for a specific time period. For example, Happy Hour pricing.

Search

If you don't see the **Pricing** category you need on screen, type the name in the search box, select the category under the **Pricing** heading, and the record displays; from here you can view the pricing specifics for that category and make changes.

Filters

The **Pricing** screen allows you to filter alphabetically by category.

New

Click the **New** button to add a new pricing category to the menu. All fields are optional unless indicated.

**Name:** Type a name for the new pricing category. This is a required field.

**Short Identifier:** Type a short name for the pricing category. For example, you might have a category called Happy Hour and the Short Identifier could be HH.

**Apply Post-tax:** Check the box in the field to allow this pricing to be applied after taxes are calculated and therefore **not** increase or reduce the original tax amount.

**Room Specific:** Check the box in the field to allow this pricing to only apply to the rooms it is attached to.

**Start Date:** Click in the field and the calendar displays allowing you to choose the month, day, and year to begin offering this pricing. Note that setting a start date is optional and only needs to be input if the pricing should not take effect until a specific date. For example, a month-long promotion pricing can be configured to start on the first day of an upcoming month.

**End Date:** Click in the field and the calendar displays allowing you to choose a month, day, and year to end this pricing. Note that setting an end date is optional and only needs to be input if the pricing should expire on a specific date. For example, a week-long promotion can be configured to end on an upcoming Sunday.

**Schedule:**  Click in the field to select a specific day of the week. Choosing a day will unhide **Start Time** and **End Time** boxes to enter a start and end time. You can customize each day of the week, if desired.

**Tip:** An end time should always be later than its corresponding start time. If a daypart needs to span midnight then two dayparts should be used. For example, 9:00pm-1:00am would be configured as 9pm-11:59pm on the first day and 12:00am-1:00am on the following day.

**Pricing:** Click in the field to apply the pricing on any or all of the following components: **Tag, Group, Section, Item/Size, Attribute**. The choice of any of the components prompts you to make select a **Rule**, enter an **Amount**, select that component (meaning if you're applying this pricing to a tag, you will indicate the specific tag to apply it to), and to check the box if you want to modifiers to apply. In the example below, we're creating Happy Hour pricing. We'd like it to apply to a tag. We want to Force Price, that price is ($) 4.00, the tag is Happy Hour, and we've determined it should **not** apply to modifiers.

| Pricing | | | ≡ |
|---|---|---|---|
| Tag | Force Price | 4.00 | 🗑 |
| Happy Hour | | ☐ Affect Modifiers | |

**Available Online:** Check the box in the field to allow this pricing rule to take affect online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers to see this pricing rule on the Kiosk or Skip the Line.

Save

 Once you've finished creating a new price, click the **Save** symbol in the bottom right corner to save your changes.

# Editing

To edit an existing price, click the price and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

 **Create New:** Click to create a new price.

 **Duplicate:** Click to duplicate the existing price. This is a good time-saving feature.

 **Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

 **Delete:** Click to price the group.

Admin Console Setup Guide

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:**  Once you've finished making changes to an existing price, click to save your changes.

# Discounts

**Discounts** allow you to set up specific discounts for your business. Discounts are for Items on the ticket. For example, you might want to offer a Friends and Family Discount, a New Customer Discount, or a Veteran's Discount.

## Search

If you don't see the **Discount** you need, type the name in the search box, select the discount under the **Discount** heading, and the record displays; from here you can view the discount's specifics and make changes.

## Filters

The **Discount** screen allows you to filter alphabetically by **Discount** and **Location** by clicking on the headings.

## New

Click the **New** button to add a new discount. All fields are optional unless indicated.

**Name:** Type a name for the new discount. This is a required field.

**Apply Post-tax:** Check the box in the field to apply this discount after taxes are calculated so they will **not** increase or reduce the original tax amount.

**Fixed Price:** If you select this check box, the POS will apply a fixed price to qualifying items. You can set the fixed price in the **Amount** box. In the POS, if you apply the discount to a qualifying item, the POS will reduce the price of the item to the fixed amount in the discount's settings. The POS will only apply the discount to items with prices higher than the discount's fixed price. You can also define fixed price discounts with promotional codes that customers can use in the Online Ordering website and the Kiosk and Guest apps.

**Open Amount:** Check the box in the field to enable this discount's amount to be configured at the time it's applied to the item. Checking the box hides the **Amount, Number of Required Items,** and **Tag for Required Item(s)** fields.

**Affect Modifiers:** Check the box in the field to enable this discount to apply to the total price of the item including additional modifier ingredients and context item prices, rather than solely affecting the base price or size price.

**Tippable:** This discount reduces service charges, auto-gratuities, and suggested tip amounts.

**Amount:** Enter the discount amount. Click the **$** sign or the **%** to the right of field to indicate if

this is a dollar or percentage discount.

**Number of Required Items:** Enter the number of items required to be used in order to apply this discount to another item; the default is 0 if no required item tag is set. For example, Buy X Items, Get 1 Free, where X is the number of items that have the required tag.

**Tag for Required Item(s):** Click in the field to select from the **Tags** you previously created. This field is the tag that is required on an item so that it may be used to apply this discount to another item; leave empty if not additional items are required. For example, Buy X, Get Y, where X is an item with the required tag.

**Tag for Discountable Item:** Click in the field to select from the **Tags** you previously created. This field is the tag that an item must have for this discount to be applied to that item; leave empty if this discount can be applied to any item. For example, Buy X, Get Y, were Y is an item with the specified discount tag.

## Save

Once you've finished creating a new discount, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing discount, click the discount and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new discount.

**Duplicate:** Click to duplicate the existing discount. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

 **Delete:** Click to delete the discount.

 **Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

 **Save:** Once you've finished making changes to an existing discount, click to save your changes.

# Adjustments

**Adjustments** allow you to set up specific discounts for your business. Adjustments are for the whole ticket. For example, you might want to offer a Friends and Family Discount, a New Customer Discount, or a Veteran's Discount.

## Search

If you don't see the **Adjustment** you need, type the name in the search box, select the adjustment under the **Adjustment** heading, and the record displays; from here you can view the adjustment's specifics and make changes.

## Filters

The **Adjustment** screen allows you to filter alphabetically by **Discount, Location,** and filter by **Default, Minimum,** and **Maximum** by clicking on the headings.

## New

Click the **New** button to add a new adjustment. All fields are optional unless indicated.

**Name:** Type a name for the new adjustment. This is a required field.

**Credit Cards:** Check the box in the field to enable the adjustment to automatically apply **only** upon charging a credit card (Auto Apply Charges only). Only the latest surcharge are used if this adjustment is **not** room specific. Note that when this functionality is enabled the **Apply Post-tax, Charge, Service Charge, Non-Revenue,** and **Auto Apply** fields are hidden.

**Default Amount:** Enter the default amount. Click the **$** sign or the **%** to the right of field to

 indicate if this is a dollar or percentage discount.

**Tippable:** This discount reduces service charges, auto-gratuities, and suggested tip amounts

**Apply Post-tax:** Check the box in the field if you want the adjustment to be applied after taxes are calculated meaning it will **not** increase or reduce the original tax amount.

**Charge:** Check the box in the field if you want to set the adjustment type as an added charge rather than a subtracted credit.

**Service Charge:** Check the box in the field if you want to set the adjustment type to be a service charge or a gratuity so it can be paid out to the server

**Non Revenue:** Check the box in the field if you want to set the adjustment as non-revenue for reporting purposes (Service Charge Only).

**Auto Apply:**  Check the box in the field if you want the adjustment to be automatically applied to the ticket.

**Room Specific:** Check the box in the field if you want the adjustment applied to the room(s) it's assigned to.

**Minimum:** Enter the minimum amount; this is the least amount that the staff can input when manually entering the adjustment amount. The default is 0.

**Maximum:** Enter the maximum amount; this is the greatest amount that the staff can input when manually entering the adjustment amount. The default is 0.

**Party Size:** Enter the party size; this is the minimum required number of guests on the ticket before the adjustment is automatically applied.

# Save

Once you've finished creating a new adjustment, click the **Save** symbol in the bottom right corner to save your changes.

# Editing

To edit an existing adjustment, click the adjustment and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:**  Click to create a new adjustment.

**Duplicate:** Click to duplicate the existing adjustment. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

**Delete:** Click to delete the adjustment.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:**  Once you've finished making changes to an existing adjustment, click to save your changes.

# Promotions

**Promotions** allow you to set up specific codes that correspond to adjustment or discounts. They're intended to drive sales versus a discount which is reducing the price. For example, you might create a new mixed drink on your menu and the first 100 people who order it get a free glass with your restaurant's logo.

## Search

If you don't see the **Promotion** you need, type the name in the search box, select the adjustment under the **Promotion** heading, and the record displays; from here you can view the promotion's specifics and make changes.

## Filters

The **Promotion** screen allows you to filter alphabetically by **Promotion, Location, Promo Code** and **Type** by clicking on the headings.

## New

Click the **New** button to add a new promotion. All fields are optional unless indicated.

**Name:** Type a name for the new promotion. This is a required field.

**Promo Code:** If you choose to enter a promotional code, also called a promo code, enter it in the field. Promo Codes can be entered by a guest online or by the server on the POS system itself.

**Promo Type:** Click in the field to choose whether the promotion is an **Adjustment** or a **Discount**.

**Available Online:** Check the box in the field to allow customers to use the promotion online.

**Available For Kiosk/Skip The Line:** Check the box in the field to allow customers see the promotion on the Kiosk or Skip the Line.

# Save

Once you've finished creating a new promotion, click the **Save** symbol in the bottom right corner to save your changes.

# Editing

To edit an existing promotion, click the promotion and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new promotion.

**Duplicate:** Click to duplicate the existing promotion. This is a good time-saving feature.

**Location Overrides:** Click to change the locations settings. For example, Kiosk/Skip the Line, Online, In-Store.

**Delete:** Click to delete the promotion.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing promotion, click to save your changes.

# Void Reasons

**Void Reasons** are the reasons you set to indicate why an employee might void a ticket or void items on a ticket. For example, Cold Food, (the customer) Did Not Like, Changed Mind, Missing Items (from their order), Server/Bartender Error, Kitchen Error…

## Search

If you don't see the **Void Reason** you need, type the name in the search box, select the void under the **Void Reason** heading, and the record displays; from here you can view the void reason's specifics and make changes.

## Filters

The **Void Reason** screen allows you to filter alphabetically by **Void Reason** by clicking on the headings.

## New

Click the **New** button to add a new void reason. All fields are optional unless indicated.

**Name:** Type a name for the new void reason. This is a required field.

**Restore Stock:** Check the box in the field to indicate that the void reason will increase the available item stock.

## Save

Once you've finished creating a new void reason, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing void reason, click the void reason and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:**  Click to create a new void reason.

**Duplicate:** Click to duplicate the existing void reason. This is a good time-saving feature.

**Delete:** Click to delete the void reason.

**Remove From This Location:** Click to remove the void reason from this location.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing void reason, click to save your changes.

# Upsell Profiles

**Upsell Profiles** allow you to display suggestive selling prompts to customers. For example, a customer might order a burger and a side item like fries, but no beverage. When the customer tries to pay, the app can "read" that order and recommend options to the customer (e.g. "Do you want a drink with your order?") By defining an upsell profile, you can set the conditions that trigger an upsell prompt at the app, as well as the text of the prompt.

## Search

If you don't see the **Upsell Profile** you need, type the name in the search box, select the upsell profile under the **Upsell Profile** heading, and the record displays; from here you can view the upsell profile's specifics and make changes.

## Filters

The **Upsell Profile** screen allows you to filter alphabetically by **Upsell Profile** by clicking on the heading.

## New

Click the **New** button to add a new upsell profile. All fields are optional unless indicated.

**Name:** Type a name for the new upsell profile. This is a required field.

**Message:** Type a message prompt for the upsell. For example, "Would you like to add a beverage?". This is a required field.

**Assigned Sections:** Add the section(s) to which you want this upsell to apply. For example, you might want to prompt adding a beverage if the customer orders from the Appetizers section.

**Assigned Items:** Add the item(s) to which you want this upsell to apply. Note that when we think about hierarchy, **section** is above **item**. If you've decided that when the customer orders from the Appetizer section they'll get the upsell prompt then it's not necessary to select all the items in the Appetizer section; however, you might determine that you also want certain individual menu items to apply to the upsell prompt. You can use the **Assigned Items** fields to list one or more individual items to also apply to the upsell prompt.

**Assigned Tags:** Add the tag(s) to which you want this upsell to apply.

**Order Missing:** Click in the field to choose either **Prompt for upsell when order is missing ANY items listed below** or **Prompt for upsell when order is missing ALL items listed below**.

**Missing Sections:** If you chose in the previous field that you want the upsell to apply in an "any or all" scenario, you can choose a specific section(s) using the drop-down arrows.

**Missing Items:** If you chose in the previous field that you want the upsell to apply in an "any or all" scenario, you can choose a specific item(s) using the drop-down arrows.

**Missing Tags:** If you chose in the previous field that you want the upsell to apply in an "any or all" scenario, you can choose a specific tag(s) using the drop-down arrows.

# Save

Once you've finished creating a new void reason, click the Save symbol in the bottom right corner to save your changes.

# Editing

To edit an existing upsell profile, click the upsell profile and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Create New:** Click to create a new upsell profile.

**Duplicate:** Click to duplicate the existing upsell profile. This is a good time-saving feature.

**Delete:** Click to delete the upsell profile.

**Remove From This Location:** Click to remove the upsell profile from this location.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing upsell profile, click to save your changes.

# Upsell Groups

**Upsell Groups:** Once you have defined your upsell profiles, you can add them to one or more upsell groups. After you define one or more upsell groups, you can associate them with the Online Ordering service, Kiosk app, or Guest app.

## Search

If you don't see the **Upsell Group** you need, type the name in the search box, select the upsell group under the **Upsell Group** heading, and the record displays; from here you can view the upsell group's specifics and make changes.

## Filters

The **Upsell Group** screen allows you to filter alphabetically by **Upsell Group** by clicking on the heading.

## New

Click the **New** button to add a new upsell group. All fields are optional unless indicated.

**Name:** Type a name for the new upsell group. This is a required field.

**Prompt Mode:** Click in the field to choose either **Prompt First, Prompt Until Yes,** or **No Prompt**.

**Assigned Profiles:** Click to choose the specific upsell profile(s) you want to include in this upsell group.

## Save

Once you've finished creating a new upsell group, click the **Save** symbol in the bottom right corner to save your changes.

## Editing

To edit an existing upsell group, click the upsell group and the current record displays. Use the field descriptions above for details on the fields. The record contains the following fields at the bottom:

**Duplicate:** Click to duplicate the existing upsell group. This is a good time-saving feature.

**Delete:** Click to delete the upsell group.

**Close:** Click to close the record. You can also close the record by clicking the **X** in the top right corner.

**Save:** Once you've finished making changes to an existing upsell group, click to save your changes.

# Loyalty Setup

Heartland Restaurant has a loyalty program built directly into the system that allows guests to earn points and rewards for spending money in a given location(s). By default, the program is account-level, so multi-unit account merchant guests can earn and redeem points across locations under the account. The current program works on a tiered reward option to let the merchant reward their best guests with incrementally better rewards.

## Use Loyalty

**Enables Loyalty for this location:** Check the box next to enable the Loyalty program and display additional fields.

**Loyalty Interaction Type:** Click in the field to choose how you want to track customer loyalty.

▸ **Phone Number:** This option only allows your staff to enter the customer's phone number in the **Info** page of the ticket so the system can add points to the customer's loyalty account.

**Note:** The POS will take any phone number entered here, and as a result, it is possible that staff users can enter their own phone number or a fake phone number to the ticket to earn points without the customer knowing. Phone numbers can be black-listed from participation in loyalty if necessary using the **Black Listed Phone Numbers** field described in the next section.

‣ **Scan for Points:** This option only allows customers to accrue points by scanning a QR code at the bottom of the transaction receipts with their mobile device running the Heartland Guess App.

**Notes:**

- This is the most secure way for customers to engage in the loyalty program, since the Heartland Guest App requires the text-based confirmation that the phone number is valid.

- When using the Guest App, loyalty will use the phone number with **Order Now** and **Skip the Line**.

‣ **Both:** This option allows the customer to earn points either by scanning their receipt, or by having their phone number attached to the ticket in the **Info** page.



# List Preview

Click the **Set Logo** box to upload a picture of your restaurant logo or location.

**Display Name:** Type the name of the account as you want it to appear in the Heartland Guest App.

**Customer Greeting:** This field allows you to customize the text that will be displayed to customers via a notification on their mobile device when they are in proximity of the location. To be in range, you will need to be at least in a 90 foot radius. It's recommended to have the text contain some reference to your location name, as that will help signal to the customer which location they are being greeted by. This text can be changed as often as desired.

**Dollars Per Point ($X to reach reward):** The built-in loyalty program is designed to reward customers for the money they spend at your location(s). Type a dollar amount in the field (e.g. 1.00). One loyalty point is accrued when a customer spends this dollar amount in your location. For every 10 points accrued, the user receives the award for their current level and permanently moves up to the next level.

**Tags for Excluded Items:** You may want to exclude certain items from the loyalty program. Click in the field to choose from a list of items to exclude. For example, it's illegal in some states

to reward customers for purchasing alcohol so you might want to create a tag for all alcoholic Items. Items with these tags will not contribute to a customer's loyalty point accrual. This field is optional.



**Blacklisted Phone Numbers:** Customers participating in the loyalty program can give you a phone

number(s) to restrict other people from accruing points or earning rewards on their account. Once one

phone number is entered the system allows for additional lines to enter additional phone numbers.

# Rewards

**Cycle Rewards:** Check the box to automatically reset customers back to Bronze reward status once they

reach Gold reward status or leave it unchecked allowing them to remain at Gold reward status and

continue to earn Gold rewards each time the points threshold is reached.

**Bronze Reward:** Click in the field to choose from **Ticket** or **Item** then indicate if you want the reward to

be a dollar amount or a percentage by selecting the corresponding symbol. In the example below, the

Bronze Reward will discount the whole ticket by 5%.



**Bronze Item Tag:** You can apply tags to an item to describe what the item does. Any item with that tag

applied is affected by the setting. For example, if you tag an item **Appetizers** then any item with the

tag of **Appetizers** that is selected for the Bronze Item will be able to be redeemed for the Bronze

Reward. You can have an unlimited amount of tags applied to a single item. Menu tags are used to

make associations between menu items and certain operational features.

**Silver Reward:** Works the same as described in the Bronze Reward. Silver Reward can be used as a

next level reward after Bronze is achieved.

**Silver Item Tag:** Works the same as described in the **Bronze Item Tag**.

**Gold Reward:** Works the same as described in the Bronze Reward. Gold Reward can be used as a next

level reward after Silver is achieved.

**Gold Item Tag:** Works the same as described in the **Bronze Item Tag**.

## Scan for Points

**Max Scans Allowed Per Day:** This option lets you determine how many scan interactions a user can perform in a 24 hour period. This can be useful to prevent loyalty fraud by staff users who may attempt to reprint transaction receipts and scan them at the end of the day in the hopes of accruing loyalty points for money they did not actually spend. Click in the field to choose from 1 to 5 scans.
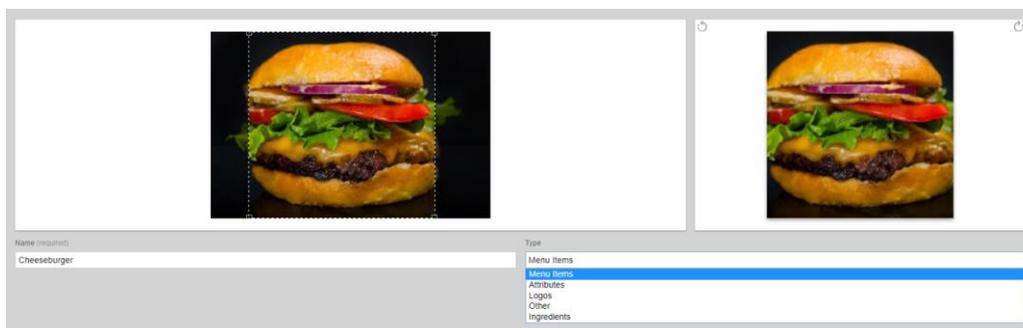
# Image Library

The Image Library is a central location for digital images and graphics. You can store stock photos or actual images of your menu items, your restaurant logo, and other helpful images like promotions and specials.

1. From the **Menu Items** heading, use the **Upload New Image** button to add an image of a menu item, attribute, logo, other, or ingredients.
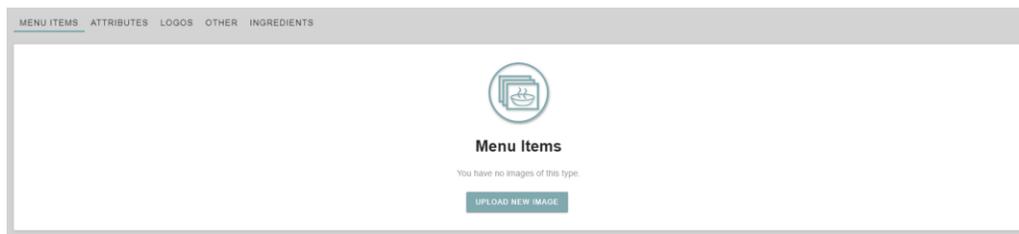


2. Use the dash lines to drag and edit the image as needed.
3. Type the menu item's name into the **Name** field.
4. Under **Type**, click in the box to choose if the image should go into one of the following types: **Menu Items**, **Attributes**, **Logos**, **Other**, or **Ingredients**



5. Click the **Upload New Image** button to add an image of a menu item.

# Uploading Multiple Images

In the **Image Library** screen, you can select and upload multiple images at the same time. In the Admin Console's main menu, click **Image Library**. In the **Image Library** screen, in any of the tabs, you can upload images by clicking **Upload**, browsing to the appropriate directory, and selecting the file of the image you want to upload, then click **Open**.  Now, you can select more than one image before clicking **Open**.

# Menu Items

From the **Menu Items** heading, you can access uploaded images of your menu items.

# Attributes

Use the pre-loaded library of **Attributes** symbols to indicate features of your menu Items. For example, to visually call out that an item(s) **Contains Peanuts**, that a burger is an **Award Winner**, or that the extreme buffalo wings are **Hot**.
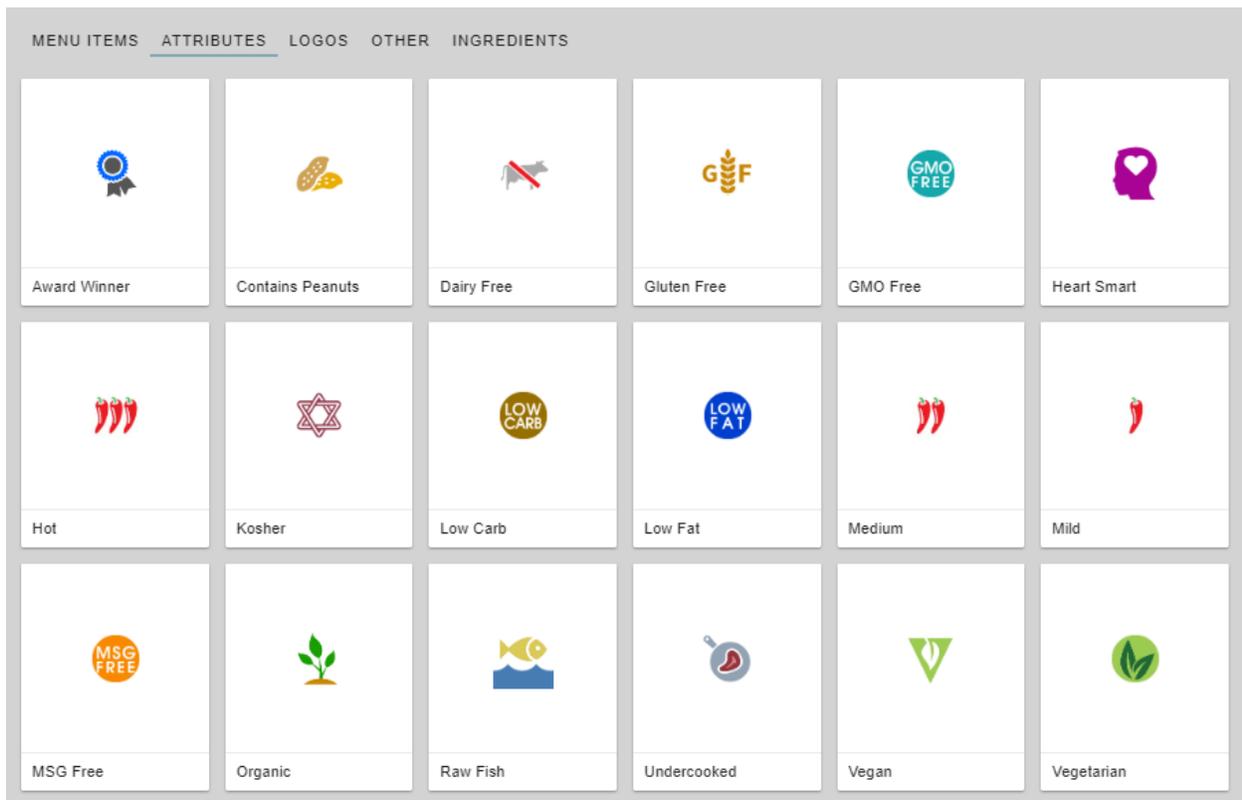
## Logos

From the **Logos** heading, you can access uploaded images of your restaurant's logo(s). This is helpful if, for example, you change your logo for the holiday season.

## Other

From the **Other** heading, you can access other uploaded images needed for your business.

## Ingredients

From the **Ingredients** heading, you can access uploaded images of ingredients.

# Dashboard

The Dashboard has the following viewing options:

▸ **Snapshot:** Displays a **Recent New Articles** section that includes important alerts and news from MobileBytes as well as new features. It also allows users to view a short summary of business from the previous day, week, and month as well as a breakdown of Hourly Sales, the Previous 7 Days sales, and the Last 7 (day of the week) sales. Note that you can only select a single date at a time when viewing stats.

▸ **Sales:** The **Sales** tab includes several sub-tabs to view **Net Sales** including Net Sales totals, average ticket sales, and closed tickets**, Gross Sales, Dayparts, Rooms,** and **Transactions.**

Within the **Sales** section:

  ▸ Daily: You can select a single date. Custom date ranges are not possible.

  ▸ Weekly: No matter what day you select out of a particular week the range will run from Sunday to Saturday. For example, if you select Tuesday 3/3/20 from the date selection screen it will show data from Sunday 3/1/20 - Saturday 3/7/20.

  ▸ Monthly: This will allow you to select a calendar month. No matter what day you select within the month it will show a report from the first and last day of that month. For example, if you select Wednesday 3/4/20 from the calendar selection screen it will show data from Sunday 3/1/20 - Tuesday 3/31/20.

  ▸ In the **Compare to Previous** drop-down box you can compare to the previous Week, Month, or Year. If you select Daily in the middle drop-down box all 3 are available, if you select Weekly only Month and Year are available…).
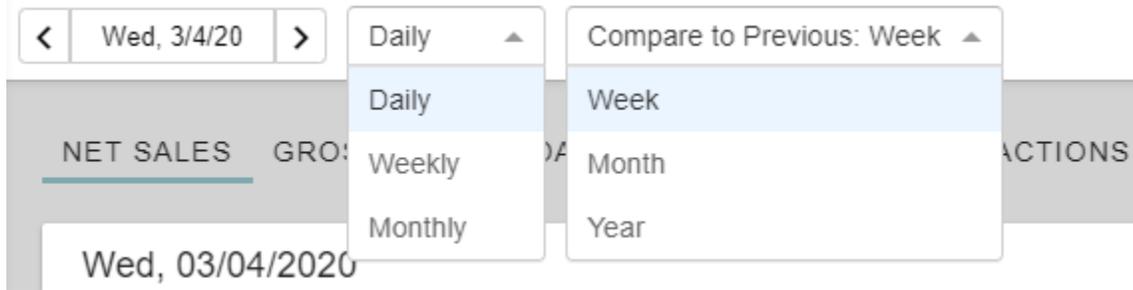
▸ **Staff:** The date range filter in the **Staff** tab operates the same as described in the **Sales** tab. The **Staff** tab includes several sub-tabs to view employees' **Net Sales** including Net Sales totals, average ticket sales, and the number of closed tickets, **Transactions** including totals, tips, tip %, **Discounts**, **Adjustments**, and **Voids**.
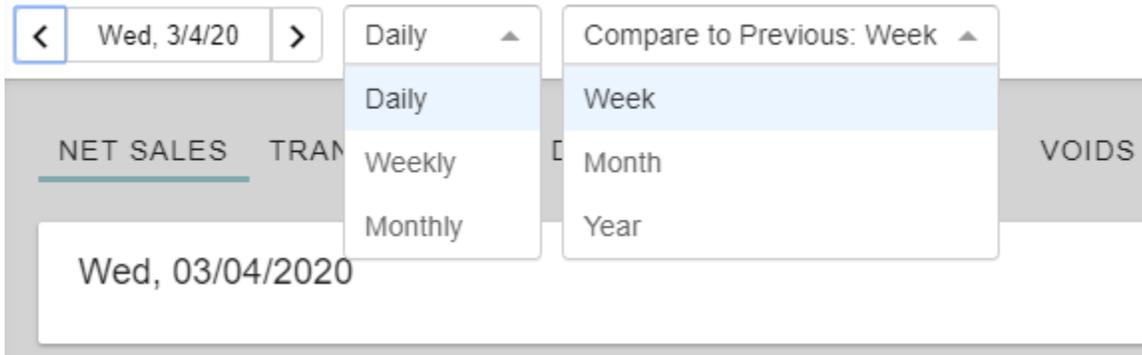


# Reports

Heartland Restaurant has many reports available to users. They can be viewed in the Heartland Restaurant App or in the Admin Portal. Note that some reports are only available in the Admin Portal.

**Tip:** Every report under the **Reports** has an option to export to a CSV file which can be read in Excel.



## Daily Summary: This is a good general report on your overall restaurant's performance.

Click the drop-down arrow to filter by All Staff or by an individual staff member. The Daily Summary allows you to take a quick look at the following elements:

- ▸ Sales
- ▸ Transactions
- ▸ Cash
- ▸ Closed Tickets
- ▸ Open Tickets
- ▸ Waste
- ▸ Tax Categories
- ▸ Dayparts
- ▸ Revenue Centers
- ▸ Groups
- ▸ Sections
- ▸ Report Categories

**Example of Daily Summary report for an individual staff member:**



Items: Displays how much of an item was ordered, the Size, Report Category, Quantity, Net and Gross Sales, Cost, and Net and Gross Margins on the item. Click the drop-down arrows to filter by All Staff or by an individual staff member, by All Rooms, by All Groups, All Sections, and All Categories or by individual criteria.

Example of Items report for an individual staff member:

| Item ▲ | Size | Report Category | Qty | Net | Gross | Cost | Net Margin | Gross Margin |
|---|---|---|---|---|---|---|---|---|
| Dragon Chicken Bowl | Regular | | 1 | $6.25 | $6.25 | | | |
| Egg Roll | | | 1 | $1.75 | $1.75 | | | |
| Orange Chicken Bowl | Regular | | 1 | $6.25 | $6.25 | | | |
| Small Garden Salad | | | 4 | $5.00 | $5.00 | | | |
| T-Shirt | | merchandise | 1 | $13.81 | $20.00 | $10.00 | $3.81 | $10.00 |
| Teriyaki Chicken Bowl | Large | | 1 | $6.50 | $6.50 | | | |
| Yoshi Ramen | | | 1 | $9.00 | $9.00 | | | |
| **Total** | | | **10** | **$48.56** | **$54.75** | **$10.00** | **$38.56 (79.41%)** | **$44.75 (81.74%)** |

# Ingredients:

Displays which ingredients were ordered for the day and the Quantity of the ingredients ordered. This report can be printed and exported.

Example of Ingredients report:

| Ingredient ▲ | Qty |
|---|---|
| Arroz | 1 |
| Cheese | 1 |
| Cilantro | 1 |
| Crema | 1 |
| Frijol | 1 |
| Lettuce | 1 |
| Onion | 1 |
| Queso | 1 |
| Tomato | 1 |
| Well Done | 1 |
| **Total** | **10** |

# Hourly Tickets: Displays the total amount of tickets per each Hour, Quantity, Seats, Guests,

Net Sales, and calculates the % of Daily Sales per hour. Click the drop-down arrow to filter by All Staff or by an individual staff members. Tickets that display here are based on when the ticket was closed within that hour.

**Example of Hourly Tickets for All Staff members:**

| ‹ Wed, 3/4/20 › | | | | Print | Export ▼ |

| All Staff ▼ | | | | | |

| Hourly Tickets | | | | | |

| Hour ▲ | Qty | Seats | Guests | Net | % |
|---|---|---|---|---|---|
| 10:00 am | 23 | 0 | 23 | $232.21 | 5.26% |
| 11:00 am | 49 | 0 | 49 | $429.47 | 9.72% |
| 12:00 pm | 64 | 0 | 64 | $581.68 | 13.16% |
| 1:00 pm | 44 | 0 | 44 | $369.80 | 8.37% |
| 2:00 pm | 11 | 0 | 11 | $163.45 | 3.70% |
| 3:00 pm | 32 | 0 | 32 | $300.79 | 6.81% |
| 4:00 pm | 20 | 0 | 20 | $184.10 | 4.17% |
| 5:00 pm | 14 | 0 | 14 | $137.61 | 3.11% |
| 6:00 pm | 20 | 0 | 20 | $244.78 | 5.54% |
| 7:00 pm | 25 | 0 | 25 | $233.29 | 5.28% |
| 8:00 pm | 11 | 0 | 11 | $1,541.35 | 34.88% |
| Total | 313 | 0 | 313 | $4,418.53 | 100.00% |

# Hourly Items: Displays the total amount of items sold by hour, quantity, Net Sales, and

calculates the % of daily sales per hour. Click the drop-down arrow to filter by All Staff or by an individual staff member, by All Rooms, by All Groups, All Sections, and All Categories or by individual criteria. Items that display here are items that were added to the ticket within that hour.

**Example of Hourly Items by an individual staff member:**

| ‹ Wed, 3/4/20 › | | | | Print | Export ▼ |

| Benito ▼ | All Rooms ▼ | All Groups ▼ | All Sections ▼ |

| All Categories ▼ | | | |

| Hourly Items | | | |

| Hour ▲ | Qty | Net | % |
|---|---|---|---|
| 4:00 pm | 3 | $8.75 | 100.00% |
| Total | 3 | $8.75 | 100.00% |

# Discounts: Displays what discounts were applied for the date range selected. You can filter by

Revenue Center or by Staff and the results includes Discount, Qty, and the Total.

**Example of the Discounts report:**

| Discounts | | |
|---|---|---|
| Discount ▲ | Qty | Total |
| Combo Meal | 23 | -$32.20 |
| Total | 23 | -$32.20 |

*All Revenue Centers* ▼    *All Staff* ▼

# Adjustments: Displays what adjustments were applied for the date range selected. You can

filter by Revenue Centers and by Staff and the results include Discount, Qty, and the Total.

**Example of Adjustments report:**

*All Revenue Centers* ▼    *All Staff* ▼

| Adjustments | | |
|---|---|---|
| Adjustment ▲ | Qty | Total |
| Employee Meal | 3 | -$25.50 |
| Manager $ | 1 | -$0.09 |
| Total | 4 | -$25.59 |

# Taxes: Displays a list of all taxes with the amount that was collected, the amount that was Inclusive,

and the total amount collected. Click the drop-down arrow to filter by All Staff or by an individual staff
member.

**Example of Taxes for All Staff members:**

❮ Wed, 3/4/20 ❯    Print   Export ▼

*All Staff* ▼

| Taxes | | | |
|---|---|---|---|
| Tax ▲ | Collected | Inclusive | Total |
| Sales Tax | $379.90 | $0.00 | $379.90 |
| Total | $379.90 | $0.00 | $379.90 |

# Surcharges: Displays a breakdown of different surcharges by Room and their amounts for

users. Click the drop-down arrow to filter by All Staff or by an individual staff member

**Example of Surcharges for All Staff members:**

| < | Wed, 3/11/20 | > | | Print | Export ▼ |

Data as of 2020-03-11 10:29:25 am

| All Revenue Centers ▼ | All Staff ▼ |

| Room Surcharges | |
|---|---|
| Room ▲ | Total |
| Tab Room | $0.11 |
| Total | $0.11 |

# Void Reasons: Displays a breakdown of void reasons given when voiding tickets, payments,

and specific items along with the total $ amount voided. Click the drop-down arrow to filter by All Staff
or by an individual staff member.

**Example of Void Reasons for All Staff:**

| < | Wed, 3/11/20 | > | | Print | Export ▼ |

Data as of 2020-03-11 10:53:32 am

| All Revenue Centers ▼ | All Staff ▼ |

| Tickets | | | Transactions | |
|---|---|---|---|---|
| Reason | Total | | Reason | Total |
| Misring | $1.97 | | Misring | $4.20 |
| Total | $1.97 | | Total | $4.20 |

| Items | |
|---|---|
| Reason | Total |
| Manager Correction | $10.00 |
| Total | $10.00 |

# Item Stock: Displays a breakdown of the stock level of each item. Click the drop-down arrow to

filter by All Report Categories or by an individual category.

**Example of Item Stock for All Report Categories:**

| All Report Categories ▼ | | |
|---|---|---|
| **Item Stock** | | |
| Item ▲ | Report Category | Stock |
| Angry Orchard Hard Cider | Beer | 4 |
| Barbeque Burger | Burgers and Sandwiches | 11 |
| Barrel Aged Dark - Madeira | Beer | 333 |
| Bottled Water | Drinks | 92 |
| Build Your Own Burger | Burgers and Sandwiches | 0 |
| Cheese Sticks with Sauce | Food - Apps | 0 |
| Coffee | Drinks | 0 |
| Milk | Drinks | 0 |
| Oatmeal Cookie Shot | Liquor | 1234 |
| Snapple Tea | Beverages | 76 |
| Vegetarian Sub | Subs | 8 |

# Call Center Tickets: Displays the individual tickets created in the Call Center. It displays

the Ticket Number, Guest, Location (Restaurant), when the ticket was opened and closed, the user that created the ticket, the type of order, and the total of the ticket. You can use the drop-down arrows to filter by location or type of tickets

**Example of Call Center Tickets:**

| ‹ Wed, 3/11/20 › | | | | | Print | Export ▼ |
|---|---|---|---|---|---|---|
| Q Search | | | All Locations ▼ | All Tickets ▼ | | |
| **Call Center Tickets** | | | | | | |
| Ticket # | Guest | Location | Opened | Closed ▲ | Call Center User | Order Type | Total |
| OLO1 | ▮▮▮ | ▮▮▮ | 03/11/20, 12:06pm | 03/11/20, 12:07pm | ▮▮▮ | Carryout | $21.40 |

# Call Center: You can use the drop-down arrow to filter by All Staff or by an individual staff

member. It displays the ticket data that was created in the Call Center by User. You can see the User that created the ticket, the number of tickets the user created, type of ticket the user created via carryout or delivery, Net Sales, and the Average Order Value.

**Example of Call Center:**

| < | Wed, 3/11/20 | > | | | Print | Export ▾ |

Data as of 2020-03-11 2:01:20 pm

| Call Center Ticket Data | | | | | |
|---|---|---|---|---|---|
| User ▲ | # Tickets | # Carryout Tickets | # Delivery Tickets | Net Sales | Average Order Value |
| ▮▮▮▮▮ | 1 | 1 | 0 | $20.00 | $20.00 |

# Tips & Payouts: Displays a breakdown of Tips and Payouts for each user. Click the drop-

down arrow to filter by All Staff or by Online sales.

**Example of Tips & Payouts for All Staff members:**

| < | Wed, 3/4/20 | > | | | | | Print | Export ▾ |

| Online ▾ |
| All Staff |
| Online |

| Tips & Payouts | | | | | | | |
|---|---|---|---|---|---|---|---|
| First Name ▲ | Last Name | Server - Cash | Server - Payroll | Merchant | Tip Outs | Total | Server Reported Tips |
| Online Order | | $2.00 | $0.00 | $0.00 | $0.00 | $2.00 | $0.00 |
| Total | | $2.00 | $0.00 | $0.00 | $0.00 | $2.00 | $0.00 |

# Tip Outs: Displays Tip Outs made from tip pools and tips from person to person. It displays Tip

Outs Pools, Staff, and Job Types.

**Example of Tip Outs:**

| < Wed, 3/11/20 > | | | Print | Export ▼ |

POOLS   STAFF   JOB TYPES

| Tip Outs - Pools | | | |
|---|---|---|---|
| Name | Total Out | Total In | Balance |
| Tip Pool Automatic | $5.00 | $5.00 | $0.00 |
| Total | $5.00 | $5.00 | $0.00 |

# Tickets: List of all tickets in a particular timeframe with the Ticket#, Opened and Closed times,

Staff member, Room, and Total. Each ticket can be clicked to see more detail. Click the drop-down arrow to filter by All Staff or by Online sales.

**Example of Tickets for All Staff members:**

| < Wed, 3/4/20 > | | | | | Print Export ▼ |
|---|---|---|---|---|---|
| All Staff | | | | | |
| Tickets | | | | | |
| Ticket # | Opened | Closed ▲ | Staff | Room | Total |
| D2 | 03/04/20, 09:01am | 03/04/20, 09:01am | Ismael | Take Out | $8.15 |
| D3 | 03/04/20, 09:01am | 03/04/20, 09:09am | Ismael | Take Out | $6.79 |
| D4 | 03/04/20, 09:09am | 03/04/20, 09:13am | Ismael | Eat In | $9.35 |
| D5 | 03/04/20, 09:13am | 03/04/20, 09:21am | Ismael | Take Out | $18.73 |
| D6 | 03/04/20, 09:21am | 03/04/20, 09:23am | Ismael | Take Out | $7.06 |
| D8 | 03/04/20, 09:28am | 03/04/20, 09:29am | Ismael | Eat In | $8.70 |
| D9 | 03/04/20, 09:29am | 03/04/20, 09:32am | Ismael | Take Out | $10.44 |
| D10 | 03/04/20, 09:32am | 03/04/20, 09:33am | Ismael | Eat In | $9.46 |
| D11 | 03/04/20, 09:33am | 03/04/20, 09:35am | Ismael | Eat In | $15.21 |
| D12 | 03/04/20, 09:35am | 03/04/20, 09:36am | Ismael | Take Out | $6.52 |
| D13 | 03/04/20, 09:36am | 03/04/20, 09:37am | Ismael | Eat In | $9.08 |
| J2 | 03/04/20, 09:37am | 03/04/20, 09:38am | Luz-Maria | Eat In | $9.08 |
| J3 | 03/04/20, 09:38am | 03/04/20, 09:39am | Luz-Maria | Take Out | $6.79 |
| D14 | 03/04/20, 09:37am | 03/04/20, 09:39am | Ismael | Eat In | $10.11 |

# Transactions: Displays detailed information on each transaction done in a particular time

frame including Ticket#, Staff member, Date, Transaction Type, Status, Customer, Amount, Tip, and Total. Click the drop-down arrow to filter by All Staff or by individual staff members, and by All Transactions or individual transaction types.

**Example of Transactions for an individual staff member:**

# Payment Terminals: Displays all Payment Terminals setup with Heartland Restaurant.

You can see the name of the terminal, Quantity of transactions, dollar amount, tip amount, and Total amount.

**Example of Payment Terminals report:**



| Payment Terminal | Quantity | Amount | Tip | Total |
|---|---|---|---|---|
| PAX S300 | 2 | $7.90 | $0.00 | $7.90 |
| Total | 2 | $7.90 | $0.00 | $7.90 |

# Cash Summary: Displays a summary of Cash Flow by user. It displays the First Name, Last

Name, total Cash, Cash Voids, Tips & Payouts, Pay In/Outs, Server Balances, and the Expected Cash.

**Example of Cash Summary report:**



| First Name | Last Name | Cash | Cash Voids | Tips & Payouts | Pay In/Out | Server Balance | Expected Cash |
|---|---|---|---|---|---|---|---|
| Ismael | | $545.26 | $0.00 | $0.00 | $0.00 | $0.00 | $545.26 |
| Luz-Maria | | $141.16 | $0.00 | $0.00 | $0.00 | -$1.00 | $140.16 |
| Monsserah | | $362.39 | $9.23 | $0.00 | $0.00 | -$1.00 | $352.16 |
| Online Order | | $0.00 | $0.00 | -$2.00 | $0.00 | $2.00 | $0.00 |
| Total | | $1,048.81 | $9.23 | -$2.00 | $0.00 | $0.00 | $1,037.58 |

# Cash Drawers: Displays a list of Cash Drawers and Server Banks with the Drawer/Bank

name, the Staff member assigned to it, and Opened and Closed times. If you tap the Cash Drawer/Server Bank name it displays a detailed report of the specific Cash Drawer/Server Bank.

Heartland
**Restaurant**

**Example of Cash Drawers report:**



## Labor Summary: If run for a single day, it displays overall totals, dayparts, and hour by

hour labor information. If ran for more than one day it will overall totals, Job Totals, and a breakdown by day.

**Example of Labor Summary report:**

| Date/Time | Regular Hours | Overtime Hours | Labor Cost | Fixed Cost | Total Cost | Item Sales | Item Labor Percentage | Ticket Sales | Ticket Labor Percentage |
|---|---|---|---|---|---|---|---|---|---|
| Wednesday, March 11, 2020 | 0.000 | 0.000 | $0.00 | $600.00 | $600.00 | $34.58 | 1,735.107% | $52.21 | 1,149.205% |
| Lunch | 0.000 | 0.000 | $0.000 | $100.00 | $100.00 | $23.94 | 417.711% | $23.94 | 417.711% |
| Evening | 0.000 | 0.000 | $0.000 | $100.00 | $100.00 | $1.79 | 5,586.592% | $1.85 | 5,405.405% |
| Dinner | 0.000 | 0.000 | $0.000 | $25.00 | $25.00 | $0.00 | 100% | $0.00 | 100% |
| Night | 0.000 | 0.000 | $0.000 | $100.00 | $100.00 | $0.00 | 100% | $0.00 | 100% |
| Day | 0.000 | 0.000 | $0.000 | $275.00 | $275.00 | $8.85 | 3,107.345% | $26.42 | 1,040.878% |
| 11pm - 12am (Night) | 0.000 | 0.000 | $0.00 | $25.00 | $25.00 | $0.00 | 100% | $0.00 | 100% |
| 10pm - 11pm (Night) | 0.000 | 0.000 | $0.00 | $25.00 | $25.00 | $0.00 | 100% | $0.00 | 100% |
| 9pm - 10pm (Night) | 0.000 | 0.000 | $0.00 | $25.00 | $25.00 | $0.00 | 100% | $0.00 | 100% |
| 8pm - 9pm (Night) | 0.000 | 0.000 | $0.00 | $25.00 | $25.00 | $0.00 | 100% | $0.00 | 100% |
| 7pm - 8pm (Evening) | 0.000 | 0.000 | $0.00 | $25.00 | $25.00 | $0.00 | 100% | $0.00 | 100% |

## Payroll Summary: This breaks down employee payouts with a list of hours for each

employee. It displays Last Name, First Name, Employee ID, Regular Hours, Regular Pay, Overtime Hours, Overtime Pay, Total Hours, and Total Pay.

**Example of Payroll Summary report:**

| Sun, 3/1/20 - Thu, 3/12/20 | Job Type Detail | Tip & Sales Detail | | Print | Export ▼ |

All Staff ▼

| Payroll Summary | | | | | | | |
|---|---|---|---|---|---|---|---|
| Last Name ▲ | First Name | Emp ID | Reg Hours | Reg Pay | OT Hours | OT Pay | Total Hours | Total Pay |
| One | Cashier | 1111 | 8.000 | $16.00 | 16.017 | $80.09 | 24.017 | $96.09 |
| Total | | | 8.000 | $16.00 | 16.017 | $80.09 | 24.017 | $96.09 |

# Time Clock: Displays the clock in and clock outs. You can sort by Date / Date Range, First

name, Time Format (Hours), and toggle for showing breaks. It displays Start Date, Start Time, End Date, End Time, Reported Tips, Regular Hours, Overtime Hours, Duration in hours, and a running Total at the bottom.

**Example of Time Clock report:**

| Sun, 3/1/20 - Thu, 3/12/20 | Sort (First Name) | Time Format (Hours) | Show Breaks | | Print | Export ▼ |

All Staff ▼

| Cashier One - Cashier | | | | | | | |
|---|---|---|---|---|---|---|---|
| Start Date | Start Time | End Date | End Time | Reported Tips | Regular Hours | Overtime Hours | Duration (Hours) |
| Mon, 03-09-20 | 11:51 am | Mon, 03-09-20 | 11:52 am | 0.00 | 0.017 | 0.000 | 0.017 |
| Mon, 03-09-20 | 4:29 pm | Tue, 03-10-20 | 4:29 pm | 0.00 | 7.983 | 16.017 | 24.000 |
| | | | Total | 0.00 | 8.000 | 16.017 | 24.017 |

# Loyalty: Displays all the Loyalty engaged customers for the merchant. It includes the Phone

Number, Name, Level, Last Visit, Total Visits, Average Spend, Lifetime Spend, Lifetime Points, Lifetime Rewards, Unused Rewards, and Email Address.

**Example of Loyalty report:**

Print    Export ▾

| Loyalty Customers | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Phone | Name | Level | Last Visit | Total Visits | Average Spend | Lifetime Spend | Lifetime Points | Lifetime Rewards | Unused Rewards | Email |
| ###-###-#### | Dan | Bronze | 02/22/19, 06:32pm | 21 | $5.44 | $114.23 | 6.9 | 0 | 0 | |
| ###-###-#### | Jack | Silver | 08/19/17, 10:36pm | 24 | $10.56 | $253.42 | 11.69 | 1 | 0 | |
| ###-###-#### | Jordan | Gold | 03/04/20, 03:15pm | 80 | $7.62 | $609.95 | 35.05 | 3 | 0 | |

# Gift (Monetary / Octopi Only): Displays the Effective Gift Liability. It displays

all gift cards associated with the merchant account and the balance of the card. All Monetary / Octopi
Gift cards start with 818181 and the report **only** displays Monetary / Octopi Gift enabled under
Payment Gateway.

**Example of Gift (Monetary / Octopi Only) report:**

Wed, 3/11/20                                                    Print    Export ▾

| Current Gift Liability | |
|---|---|
| Account ▲ | Balance |
| 81818⬛⬛⬛⬛ | $57.20 |
| 81818⬛⬛⬛⬛ | $25.00 |
| 81818⬛⬛⬛⬛ | $40.00 |
| 81818⬛⬛⬛⬛ | $25.00 |

# Account Balances (Monetary / Octopi Only): Displays the

Effective Account Balances for accounts setup as a House Account. The data displayed includes
Account Number, Account, Contact, Amount Due, Credit, and Balance. The report is only available if
you're using a House Account with Monetary / Octopi Gift.

**Example of Account Balances (Monetary / Octopi Only report:**

| Account Number ▲ | Account | Contact | Amount Due | Credit | Balance |
|---|---|---|---|---|---|
| 81818██████ | ██████████ | Jessica ████ | $0.00 | $668.75 | $668.75 |
| 81818██████ | ██████████ | Christy ████ | $100.00 | $0.00 | -$100.00 |
| 81818██████ | ██████████ | Deborah ████ | $0.00 | $300.00 | $300.00 |

Wed, 3/11/20 · Print · Export ▾

**Current Account Balances**

# Tools

The **Tools** tab is used to export your current database to an Excel file. By checking the boxes you can customize the file to include or exclude the following items:

▸ Items

▸ Sections

▸ Groups

▸ Sizes

▸ Include Deleted Info

▸ Attributes

▸ Kitchen Groups

▸ Report Categories

▸ Modifiers

▸ Ingredients

▸ Context Items

▸ Taxes

▸ Tags

▸

Use the Excel file to make changes to prices, names…in your database then import the file to update your entire database quickly rather than editing items one at a time.

Additionally, you can also export from a different POS system, then convert the formatting to HRPOS and import the menu.



Refer to the Import/Export Tool Guide for additional assistance with the **Tools** tab.

# Customers Tab

In the Import/Export screen, the **Customer** tab features controls that enable you to import a database of loyalty customer records from a database file into a new site's customer database.



If you select the **Overwrite existing customers' data** check box, the program will overwrite any existing duplicate records that it finds while importing records. The program uses customer phone numbers to determine duplicate records; if an existing record features an identical phone number as a new imported record, the program will delete the original record.

If you click **Download Template**, the program will download an empty database file (dowload.csv) to your local drive. You can use this file as a template for how customer records from the old database should be formatted in the upload source file before you import them into the Heartland Restaurant database. The upload file containing the customer records must be in .csv or .xls (Excel) format.

If you click **Import Data**, the program will open Windows Explorer, allowing you to navigate and select a database file containing the customer records you want to import. After selecting the appropriate file, click **Open**. The program will import customer records from the selected file and add them to Heartland Restaurant's delivery customer database.

The program will import the following data into each customer's record:

▸ First name

▸ Last name

▸ Phone number

▸ Email address

▸ Mailing address

In the customer record database file, if a customer record does not include any data in the **City**, **State**, or **ZIP** fields, the program will not include the customer's address when it exports the record, even if an address is entered in the **Address** field. If any of the **City**, **State**, or **ZIP** fields are empty, the program will not import any portion of the customer's address.

# Integrations

The **Integrations** tab is used to configure third-party integrations with your business.

Click the **New Integration** button and the **Integration Setup** screen displays; from here you can choose

   from your existing integrations and make changes or click the green plus sign in the bottom left to add

   a new integration.

The bottom right of the **Integrations Setup** screen includes the trash can symbol to delete an integration,

   the refresh / X symbol to discard changes or close the screen, and the disk symbol to save changes.
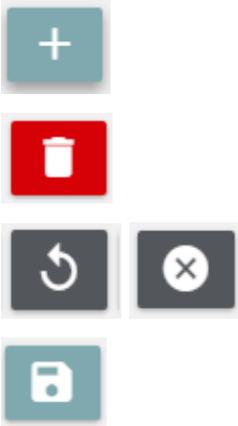
# Integration Setup

There are many possible integrations and they will all have a different set up. New integrations are always being added to Heartland Restaurant. Depending on what you select for **Integration Type**, you'll make different selections for the **Active** and **Store ID**.

Refer to <u>Heartland Restaurant – 3<sup>rd</sup> Party Integration Configuration</u> for additional assistance with configuration.

**Integration Type:** Enter the name of the integration.

**Active:** Check the box to enable this integration on your database.

**Store ID:** Enter your store ID.

# Call Center

The **Call Center** tab displays the order form that staff uses when customers call in to place orders for carryout, delivery, or catering (if applicable).

**Order Methods:** Use the drop-down arrow to select an order method (e.g. Online Ordering or Catering)

**Order Type:** Use the drop-down arrow to select the type of order (e.g. Carryout or Delivery.)

**Phone:** Enter the customer's phone number.

**Name:** Enter the customer's name.

**Email:** Enter the customer's email.

**Address:** Enter the customer's address.

**Unit/Suite:** Optional field.

**City:** Enter the customer's city.

**State:** Use the drop-down arrow to select the customer's state.

**Zip:** Enter the customer's zip code.

**Special Instructions:** Any special instructions can be typed in the text box (e.g. No mayo).



# Users

The **Users** tab contains the following sections:

- ▸ **Users**
- ▸ **Permissions**

**Users** displays a listing of your current users (employees) that are loaded to your database. Double

click on a user's name to open and edit their record or click the green **New** button to create a new

user.

**Permissions:** Allows you to create different permission levels to configure what each user can access

within your database.

## Users

**First Name:** Enter the user's first name.

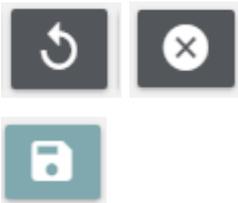**Last Name:** Enter the user's last name.

**Email:** Enter the user's email address.

**Call Center:** Check the box to enable the user to place call center orders.

**Admin:** Check the box to allow the user access to anything and everything. Note that this overrides all

permissions. By checking Admin you are giving the user full permission to perform any action.

**Auto Logout Time:** Use the drop-down to choose from 15 minutes, 30 minutes, or 60 minutes to auto

logout of the Admin Portal.

**Resend activation email:** If the person did not receive the email to activate their account, this will resend

the email.

The bottom right of the **New User** screen includes the refresh / X symbol to discard changes or close the

screen, and the disk symbol to save changes.

Refer to [Heartland Restaurant – Admin Portal User Permission Settings](#) for additional assistance with user permission settings.


# Permissions

Click the **Create a Permission** button and the **New Permission** screen displays allowing you to create a permission level for a user.


**Name:** Enter the user's name.

**Publish Changes:** Check the box to allow the user to publish changes.

**Location Setup:** Check the box to allow the user to edit pages under the Setup tab.

**Staff Members:** Check the box to allow the user to edit staff related pages.

**Menu:** Check the box to allow the user to edit pages under the Menu tab.

**Loyalty:**  Check the box to allow the user to edit Loyalty pages.

**All Reports:** Check the box to allow the user to run any current and future reports. Note that checking this box allows access to run **all** reports so the individual report selections below are hidden. You can make individual selections allowing a user to only access certain reports, if desired.

**Sales Reports:** Check the box to allow the user access to run Sales reports.

**Payroll Reports:** Check the box to allow the user access to run Payroll reports.

**Labor Reports:** Check the box to allow the user access to run Labor reports.

**Loyalty Reports:** Check the box to allow the user to run Loyalty reports.

**Gift Reports:** Check the box to allow the user to run Gift reports.

The bottom right of the **New Permission** screen includes the refresh / X symbol to discard changes or close the screen, and the disk symbol to save changes.



# Billing

**Note that this is only for MobileBytes as all billing is handled by Heartland.**

The **Billing** tab allows you to link a bank account(s) to your database. Click the **Add Bank Account** button and the **Add Payment Method** screen displays. To add a new payment method, complete the fields and click the checkmark button in the bottom right.

**Payment Method:** This field is prefilled with **Bank Account.**

**Account Holder:** Enter the name on the account. This can be a company name or an individual's name.

**Account Type:** Click the drop-down arrow to choose from Company or Individual.

**Routing Number:** Enter the nine digit routing number. This is typically the first set of numbers on the bottom of your checks.

**Account Number:** Enter the account number. This is typically the 10-12 digit number after the routing number.

**Confirm Account Number:** Reenter the account number.

**Note the following on screen message:**

After adding your bank account info the following will happen:
1. We will make two small deposits between $0.01 and $0.99 into your bank account.
2. In 2-3 days these amounts will appear on your statement.
3. You will need to come back here and verify the deposits to complete the verification.

**Important:** You must verify the deposit amounts to complete verification and properly link this account.

## Add Payment Method                                    ✕

**Sign in to Bank**
or
**Enter Account Info Below**

Payment Method

Bank Account

Account Holder Name (required)

[                                          ]

Account Type

Company

Routing Number (required)

[                                          ]

Account Number (required)

[                                          ]

Confirm Account Number (required)

[                                          ]

After adding your bank account info the following will happen:
1. We will make two small deposits between $0.01 and $0.99 into your bank account.
2. In 2-3 days these amounts will appear on your statement.
3. You will need to come back here and verify the deposits to complete the verification.

✓