

Heartland

Restaurant

FAQ

Rev. 1/2020

Table of Contents

Overview	12
Glossary of Terms	12
SMS Texting Feature	14
What are the current capabilities\uses of the SMS Notification feature?	14
When do we add texting\SMS to the quote?	14
When SMS Notifications\Texting is enabled is an unlimited amount of texts allowed?	15
Are SMS texting features available for texting copies of receipts to customers?	15
How do you enable and use the Waitlist option with text alerts?	15
Will my Demo Accounts for my Dealership have SMS Notifications enabled?	15
Will the SMS notification feature still work in Demo Mode?	15
How do I terminate or disable SMS notifications?	15
Payment Processing Integrations	15
What credit/gift processors does Heartland Restaurant currently support?	15
How do I know what Processor configuration will work for my merchants?	15
What MSR devices are supported with Heartland Restaurant?	15
How do we order MSRs for a merchant? Is the process different for an Encrypted MSR?	16
When would I order an unencrypted MSR?	16
What kind of EMV devices can be used with Heartland Restaurant?	16
How are PAX devices ordered?	16
How do I configure a PAX D210 for Pay at the Table?	16
Can we attach an EMV device for Demos?	16
When a merchant using PAX enters in a phone order, can they enter the payment information on the screen or does it need to be on the PAX device?	16
Is it possible to run a Shared PAX reader aka a PAX reader that links two two different iPads?	17
If we are using another EMV on the back counter for call in orders and we have two terminals which could potentially take a call in order, do we need one extra pax for each terminal, or can the two share one pax for that purpose?	17
If a merchant only uses a direct integration without a payment gateway, what features\functions will be unavailable?	17
Is it possible to have both a PAX device and an MSR device assigned to an iPad?	17
Can Heartland Restaurant run with a Mix of MSR and PAX in store? For example, if a merchant has a physical store location(PAX) and a food truck(MSR).	17
If a merchant has PAX EMV set up and a payment gateway via an MSR, can they use them interchangeably?	18
Are offline transactions supported for EMV and MSR?	18
Can both Monetary and BridgePay run offline transactions?	18

Can you restrict the amount of transactions or the amount of a single transaction that can be processed while offline?	18
If offline transactions are performed by merchants running on Monetary or BridgePay, will transactions still get a Pre-Authorization as they normally would when they are online?	18
If a merchant uses an EMV solution but, also uses an MSR integration with a payment gateway and their location goes offline what steps do they need to take to enable offline transactions?	19
Are there any special steps to Authorize Offline Transactions once back online?	19
Who is responsible for setting up a payment gateway?	19
Are there fees for using a Payment Gateway for processing? Does the Payment Gateway charge the fee directly to the Dealer or Merchant?	19
Is there a Pay-at-the-Table option currently available for Heartland Restaurant? If so, can EMV be used for this?	19
Is EMV for a Kiosk supported?	19
Is NFC to NFC for Apple Pay supported with Heartland Restaurant?	20
What processors will require the 3rd Party Credit Card Processing fee?	20
Is a Gateway (BridgePay, Monetary, etc) required for guests to use Loyalty rewards on Heartland Restaurant?	20
Is it possible to turn off the signature on the Sign on screen of a PAX device?	20
Does the Credit Card Tab setting under Settings in the Admin Portal only work with an MSR? Does it preauth the card or simply store the card for payment later?	20
Does the feature to move Credit Card Tokens\Information between checks work with EMV?	20
If a customer pays for a check through Scan to Pay is it classified as a Card not present transaction?	20
Dealer Capabilities	20
How do I copy data to Live Accounts? Can I start creating the menu and setup before a location goes live?	20
When copying a Demo Account to a Live Account will anything be lost?	21
Is there anyway to get dealer credentials if we have not taken the Product Overview Session?	21
When will I as a dealer have my own login to Heartland Restaurant?	21
Will my dealership receive a single Admin Portal login for the entire dealership or per user? Can I create my own additional users?	21
How can I delete one of my Demo Accounts or Demo Locations?	21
Will dealers have permission to change the Account Name and/or the Location Name of a Real/Live location?	21
If I publish something in error to a location, is there a way to rollback/revert to my previous setup or previous publish?	22
Is the Audit Trail searchable?	22
Can dealers copy a location that is not their own?	22
If I have a live site that I am working with that requests a large amount of changes but, I want to test them first, what can I do?	22
Can you schedule changes to be made to settings\menu in the Admin Portal?	23
My screen shows differently compared to my merchant's ipad. Why is this?	23
Are there any Demo\Seeded databases available for specific types of restaurants?	23
Will Heartland POS be providing Corporate images for Menu Categories, Menu Pictures, Tags, etc?	23

Is it possible to transfer one menu template from one dealer account to another dealer account? 23

Staff\Employee\Shifts Setup 23

What options are available to configure Tip Outs? Can it be based on Revenue Centers or Report Categories for instance? 23

When going to Tip Out a Staff Member, what is the Suggested share of tips shown on the Tip outs page calculated off of? 24

How are Manager Cards ordered and configured for Heartland Restaurant? 24

Can I use Manager Cards on encrypted and unencrypted MSRs? 24

Is there currently a way to share a Schedule with a Staff Member or export it? 25

Are the Scheduled Shifts printable? 25

Are there any job templates available for common jobs that contain pay rates, permissions, etc? 25

When assigning a Job Type to a staff member, do I always have to manually enter it? 25

Is there Staff facing access to scheduled shifts in the Heartland Restaurant App? 25

What is the difference between permissions under Job Type and the permissions under Permissions in the Admin Portal? 25

Where is the option to toggle the ability to clock in and out for a Staff Member? 26

Can an employee clock in and out on any Ipad? 26

How do I configure multiple Job Types for a single employee and how does this look? 26

Admin Portal - General Questions 26

Does Heartland Restaurant support managing a multi-location restaurant from one Admin account? 26

I see a Save option and a Publish Changes option. What is the difference? 28

How do you backup and restore databases in Heartland Restaurant? 28

Are any keyboard shortcuts available? For example, Ctrl + S to save or Ctrl + D to duplicate an item instead of clicking the respective buttons. 28

Are letters and numbers both supported for table names? What if two tables have the same name? 29

Can we change the logo that displays to customers? Can we remove/change the default logo/banner? 29

What are the recommendations for images/logos/banners I upload to Heartland Restaurant? 30

In regards to the Menu Import\Export Option under Tools in the Admin Portal, would it be beneficial to create an item called template to just fill in the fields with a description of what the field is? 30

When you are in the Admin Portal does every option you hover over explain what it does? 30

When settings are published from the Admin Portal, does the update happen to all the iPads at the site once you log off of one device or do you need to log off and back in on all devices? 30

Is there an option or translator that is available to help import menus into Heartland Restaurant from other Heartland POS products(ie Dinerware, Digital Dining, Liquor POS)? 30

Discounts/Adjustments 30

What is the difference between a Discount and an Adjustment? 31

Pricing Rules 31

How do you configure variable pricing for day parts, happy hours, and daily specials? 31

Does Heartland Restaurant have Happy Hour capability\timers?	31
Can you discount individual items within a Happy Hour Pricing Rule?	31
Can you use Pricing Rules to configure limited time Promotions? For example, a Happy Hour for all beers on Saint Patrick's Day weekend only.	31
Are Attributes the best option to use to set up Happy Hour items?	33
Are there Mass Attributes? For example, how can I change all beers to cost \$1 extra?	33
Taxes	33
How do you configure Multiple Taxes to apply to items?	33
Is there a way to make items tax inclusive at the Bar but not the Dining Room?	34
Is it possible to mark items as Tax Exempt within the POS or just within the Menu in the Admin Portal?	34
Menu Building	34
Is there a way to duplicate room settings/configuration to a different room?	35
Can you configure multiple menus for one location? If so, can this be configured to a time frame, or room?	35
Is there a Programming Roadmap for Heartland Restaurant? Or in other words a guide on the order to program settings and the menu in?	36
Is a Room the same as a Profit Center in Digital Dining?	36
Are Item Descriptions visible to Online Ordering customers?	36
Is there a multiplier option for ingredients?	36
What are the purpose of Context Items? How do I use them?	36
What price is the Multiplier on a Context Item of an Ingredient increasing?	37
How do you create an Open Item? Specifically, one that prompts for the name and price when selected.	37
Is there a way to Memo a modifier? Or in other words, notate a modifier separate from the parent item on kitchen slips?	37
Can a wholesale cost be added to an ingredient that the restaurant charges extra for such as cheese?	38
Is there a way to setup a donation program in Heartland Restaurant?	38
Can you create custom colors where color options are given in Heartland Restaurant?	38
Is there a way to prevent Sub Items from showing above the Main Item modifiers? For example, if I have a burger item with a modifier and a sub item of side salad with a dressing modifier. It will show in order as burger, side salad>side salad modifiers>burger modifiers.	38
If items are assigned Sizes, can you switch from size to size and have the ingredient price difference carry over across sizes? For example, a pizza with a topping of pepperoni. Pepperoni on a small pizza is \$1, medium is \$2 and large is \$3.	38
Are half and half pricing options available? If so does this reflect when sizing is changed if size pricing is configured for that ingredient?	38
With Half and Half pricing enabled, can I still duplicate a single ingredient multiple times? For example, on a Pizza I want to allow Pepperoni to be selected an indefinite amount of times.	39
Can I set an item to be measured by time? For example, this could be used to charge by the minute for Pool Tables in a bar.	39
When setting up items how does default item substitution work?	39
Can Modifiers be linked together into a Modifier set to interact with one another?	41
When configuring a Room with tables, is it possible to copy the same table so you do not have to drag and drop each time?	41

How large can the Attribute icons be?	41
How do I configure a Sub Item? For example, a baked potato can be ordered by itself or as a side choice for an entree and it has its own set of modifiers.	42
How do I switch between Modifiers for a Sub Item and modifiers for the Main Item without having to get out of the ticket?	42
How do I get off of the Modifiers screen and back into the Order screen?	43
Can I change the order that Modifiers and Ingredients show up on the receipt and in the ordering screen?	43
Are Sizes the best option to use to configure Doubles, Triple Shots, Rocks, etc?	43
Where are pictures\images for Items stored and how are they changed or removed?	44
KDS	44
What viewing options does the KDS application have?	44
Can Heartland Restaurant integrate with a Kitchen Video Monitor?	44
Is there an option for a larger monitor for the KDS integration?	44
Skip the Line	44
Can Skip the Line only be used through the Heartland Restaurant Consumer app?	44
Is there any services Skip the Line ordering is reliant on from the perspective of the consumer's phone or the iPads at the restaurant?	44
Online Ordering	44
How do I set up Online Ordering? What do each of the settings do under Online Ordering?	44
Is there a backup iPad that can be configured for Online Ordering if the iPad goes down and cannot come back up?	44
How is multi-store Online Ordering set up to select the location? Is this done within Heartland Restaurant or is this directed from the customer's website to the specific location?	45
Is there a companion app for delivery drivers? Or a way to have live tracking of the driver?	45
Can you use the Online Ordering Application to take orders, offload them to all other devices(kitchen printer/kds) via usb/file?	45
Could Online Ordering be configured to work with LTE\Cellular Networks in case of a network outage(as opposed to an ISP)?	45
Does Online Ordering capture emails of the ordering customers? If so is this reportable?	45
In the Heartland Restaurant App a long press must be done to bring up Context Items(aka, extra, light, etc). How does a customer making an online order access these?	45
Can Online Orders be set up to make a sound when they come through?	45
Can I set up Online Orders to be verified by a Server before they are sent to the kitchen?	46
Loyalty	46
What Loyalty providers are currently available for Heartland Restaurant?	46
Is there a way to import frequent diner information from Digital Dining into Heartland Restaurant Loyalty?	46
What is included in reports regarding Loyalty?	46
Is there a separate app from the Loyalty App for Online Ordering?	47
Is Beanstalk loyalty available on Heartland Restaurant when PAX is being used?	47

Is a Payment Gateway required for Guests to use Rewards\Loyalty on Heartland Restaurant?	47
Does Loyalty need to be enabled to allow customers to use Skip the Line through the Loyalty App?	47
What ways can customers redeem their rewards with the built-in Loyalty program? What does the flow look like?	47
How can customer's access their current loyalty points and rewards in the Loyalty App?	49
Merchant App	49
What all can be done within the Ticket Info screen in the Merchant App?	50
What options are available to Split and Unsplit tickets?	53
How do you remove a single Check from a Split Ticket?	53
How do you move items from one ticket to another?	53
How can a Future Order be entered in the Merchant App by a Server?	54
How does the Promise Time work in Heartland Restaurant?	54
How do you manually enter a Credit Card number on the POS when there is a card not present transaction?	55
Can you start a payment tab through an EMV device?	55
Is it possible to have 0 seats on a ticket?	55
Is there a limit to how many Groups & Sections the Menu can Display in the Merchant App? Does it scroll?	55
Are managers able to override a schedule with a swipe or passcode for another employee and/or themselves?	56
Can Staff Members have it setup to Auto Clock-In after a break?	56
Can you move a ticket to a different table?	56
What is the maximum number of split checks allowed per ticket?	56
Can you allow/prevent staff from opening other checks?	56
Can you Hold and Fire/Rush tickets\items?	57
Does holding an item affect the stock count?	57
Can multiple addresses for delivery on the same customer be entered?	58
Is there a way to filter\hide certain tickets? For example, I want a server to be able to hide open tickets until tips are paid out at the end of their shift so the screen is not cluttered.	58
Is there a Training Mode option? If so, how can you tell training mode is on?	59
After you add an item to a ticket, how do you get back to the menu to add additional items?	59
How do you combine tickets?	59
How are local changes(at the tablet) such as changing a printers IP address synced to other tablets? Is there a specific action needed or does it take place automatically within a set period of time.	60
If I make a Custom Tender Type will this option show on the Checkout screen?	60
If I publish changes when can I expect the configuration to be applied to the merchant's tablets?	60
How often do tablets sync to each other and to the cloud?	60

How do you do a Special Request?	60
Is it possible to do multiple Special Requests per item?	60
How does Coursing work? What configuration is available for Coursing? Is there a training session that covers this?	61
Is it possible to customize the name of courses?	62
How do Seat numbers work? Is there a training session that covers this?	62
Is there a workflow that automatically selects the position\seat number? For example first item ordered, next item. Or a way to select the seat before you enter the item?	62
How do I refund a specific ticket?	62
Guest Display	62
Is there a suggested tip screen on the customer display?	62
Kiosk	62
Can the Self Order Kiosk be configured to suggest a similar item if a certain item runs out?	63
Are there any upselling configurations available for the Self Order Kiosk via profiling?	63
Can we prevent items in the Kiosk from being searched, similar to OLO?	63
Start/End day/Daily Operations	63
How long is ticket information retained in Heartland Restaurant?	63
How does a Staff member transfer a ticket to themselves or another Staff Member?	63
Is there any reporting ticket transfers? If so, how do these transfers report?	64
Is there a purchase order function available?	64
How does Server Banking work with Heartland Restaurant?	64
How are Server Checkouts performed? Can one be done in the middle of the day to make a 'Drop' when too much cash is in the drawer?	64
Is a sale always recorded under the original ticket owner or the person who closed the ticket?	64
When is a sale and a transaction recorded in reporting?	65
Is a Transaction always recorded under the person who initiated it or the one who finalized it? How does affect who gets the tip?	65
Can you set up Heartland Restaurant so some Staff Members do not know how much cash SHOULD be in the drawer?	65
How do you manage Stock of an item or 86 an item?	66
Does the Stock Item count also include Modifiers and Ingredients?	66
If an employee is assigned a drawer at one tablet does it carry over to the other tablet or will it request that they reassign themselves a drawer?	66
If an employee signs into another tablet can they see their live tickets they created on a different tablet?	66
How do I do a manual card entry with an Ingenico terminal?	66
Reporting	66
Does Heartland Restaurant have a dashboard option to summarize a days activity in real time?	66
In the Dashboard can a Date Range be selected instead of a specific Date?	66

Can you customize the options that show in the Dashboard? For example, the ability to enter weather or special events.	67
Is there Real-time Labor Cost\Percentage reporting available in Heartland Restaurant?	67
Are seat numbers when used in the Merchant App, considered a headcount in reports? If so, can it be used to help calculate the guest check average?	68
How are Gift Cards reported on in Heartland Restaurant?	68
Can reports be created in Heartland Restaurant be scheduled to run and emailed out automatically?	68
What current export options does Heartland Restaurant have for Reporting?	68
Can reporting be done remotely from the restaurant\location?	68
Can you export reports to Excel for custom reports?	68
Is an internet connection or local network connection required to run reports? For example can an offsite iPad still run reports if it has an internet connection?	69
Is a report available that would be the equivalent of a Product Mix Report?	69
What does reporting look like for future orders scheduled for upcoming days?	69
Troubleshooting\Error Messages	69
I set up Online Ordering and I am unable to get it to work properly. What did I miss?	69
How long can Heartland Restaurant run offline?	69
Do you need one iPad with more memory for offline operation?	69
When using the Request Screenshot option under Authorized Tablets in the Admin Portal, does it take a screenshot of the iPad screen or just the Heartland Restaurant App?	70
As dealers are we able to remote into a merchant's iPad? If so, are there any known applications that support remotng into tablets?	70
How do I switch the database I am currently logged into on the Merchant App?	70
If the iPad designated as the Dedicated Socket Server goes down, will all printing go down? Do any other functions go down with it?	70
How is Wifi configured for the iPads? Don't you typically need a PC?	70
I set up a live merchant and it is showing DEMO at the top right. What does this mean?	71
A manager at the restaurant cannot see any options in the Reports menu in the Heartland Restaurant App. Some can see some reports but not all necessary reports. However, all reports are visible on the Admin Portal. Help!	71
I am getting a window that says Sync In Progress and cannot view or edit any existing tickets. How do I fix this?	71
How do you remove the Not on Wifi/Ethernet watermark? What about the No Sockets watermark?	71
If a tablet goes down and a new one is used as a replacement, will transactions for that device be lost?	72
Will tickets and transactions done in Support Mode impact a merchant's reporting?	72
I cannot get Scan to Pay to work, what should I do?	72
Are there any logs that could be looked at which are dealer facing in the event of issues?	72
If the network is down can orders be loaded via USB?	73
If the internet goes down, exactly how will the POS react and operate?	73
What if I am receiving a message stating, "You're already attached to a drawer on another device"	73

My merchant had an issue with some transactions and was advised to retrieve full card numbers and manually key in the transactions however, the CVV field is required. 73

System\Network Specifications 73

Can you take an iPad or Kiosk off site for events? 73

Are Static or DHCP assigned IP Addresses recommended? 74

Is the socket linked to the Mac Address or the IP Address of the iPad? 74

Is there a list of recommendations for how to pre-configure iPads for the Heartland Restaurant environment? 74

What's the recommended wireless strength for those carrying tablets to a table? 74

Would an iPad with 32GB of storage be sufficient to run Heartland Restaurant? 74

Where can we find the supported\certified hardware list? 74

Does a Guest Display or KDS iPad need to be the same or similar device as the iPads used to run the Heartland Restaurant app? 74

What is the minimum recommended specs for iPads being used with Heartland Restaurant? 74

Is there any difference between stationary and mobile tablets in regards to Heartland Restaurant? 75

Can the Heartland Restaurant App be run on PC/MAC? What about iPhones or upcoming iPod Touch devices? 75

Can iPads that have a cellular network be used with Heartland Restaurant? 75

Can multiple iPads be used with a 'Shared' cellular connection? 75

Can delivery drivers take credit payments from an iPad if they have one they take with them? 75

Would Heartland Restaurant be ideal for a merchant who has a 'brick and mortar' store location as well as a food truck using tethering from a phone and still run at the same time? 75

Is it possible to have a Multi-Network Setup for a large location without having to split it into two locations? 76

Printing 76

When a Future Order is placed does it print immediately? Can this be configured to include the Order Due Date and Time? 76

Is there a way to request or change the label size? For instance, if I want a 1 X 2 inch label size. 76

What is the currently supported label printer? 76

What type of labels are recommended? 76

Is there any setup required for the Epson L90 printer for it to work as a label printer? 76

Can the printed guest check sort items by food/bev and subtotal prior to discounts being applied? 77

How do you disable QR Codes on the Receipt? 77

How does the Print button work in the Reports screen on the Heartland Restaurant App? Is it different when printing in the Admin Portal? 77

Does the Print option in the Reports screen on the POS App auto adjust the print area based on the printer type? 77

Is there a way to print modifiers in a different color/font/font size than the items? 77

What sorting options are currently available for the ordering of items on kitchen tickets? 77

What option needs to be configured to separate how tickets are displayed in the kitchen for different areas or items? For example, if I want Carryout Orders display differently than Dine-in orders.	78
What is the reasoning behind using a Dedicated Socket Server vs. using a Dynamic(Priority-based) Socket Server? What are the main differences between the two? Are there any other Printing Methods I should be aware of?	79
How do I set up a printer from beginning to end? How does all of the configuration options line up to the printer?	79
Is it recommended to have a hard-wired network connection to the tablet that will serve as the Dedicated Socket server instead of Wi-Fi?	82
Are alternate names for the kitchen supported? If so, are other languages with special characters supported for this?	82
If the item rollup setting is on and you order two of the same items with different modifiers how does it print or display on the KDS?	83
When setting up a printing logo in Heartland Restaurant, is there any additional configuration that needs to be done on the printer itself for the logo to print?	83
What printers are the preferred printers to use with Heartland Restaurant?	83
Peripherals	83
Is there a scale integration available? Which printer supports the scale?	83
Is there a Barcode\SKU Scanner integration available?	83
What are the limitations on barcode scanning in Heartland Restaurant? For example, is there a cap on the number of items that can be scanned? Is it possible to import a file with retail items with barcode scanning available?	84
Offered Integrations(3rd Party or Heartland POS)	84
What 3rd party integrations are currently available with Heartland Restaurant?	84
Can a customer have API access to develop their own reporting tool?	84
Are there currently any 3rd party inventory tracking integrations with Heartland Restaurant?	84
How do I retrieve an API key for locations wanting to use a current 3rd Party Integration?	84
Are there any Property Management Systems integrations available with Heartland Restaurant?	84
Is a Quickbooks integration offered for Heartland Restaurant? If so, is it for the full or web version?	84
Does Heartland Restaurant work with any 3rd Party Kitchen Display Systems(KDS)?	85
Hardware	85
What Hardware is supported and certified for Heartland Restaurant?	85
Is there an option for an enclosure for the Customer Display?	85
For demoing purposes should I use an iPad Mini or a bigger iPad?	85
Can we buy equipment through distribution if we want to buy one time vs PaaS so customers can buy it either way?	85
Is Control Scan required for Heartland Restaurant implementations?	85
Is there currently an ETA on when hardware will be available in the PaaS catalog?	85
Will 12 inch ipad pros be available for Heartland Restaurant?	85
Documentation\Resources	85
Will documentation be provided to us for available options and general functionality in Heartland Restaurant?	86
What is the email address to connect with sales/feature questions?	86

Is there a support team available for Heartland Restaurant?	86
Business\Sales Questions	86
When will Heartland Restaurant be released for dealers to sell?	86
What languages & currency does Heartland Restaurant currently support?	86
Is there a timeline for when Spanish support and other languages will be available?	86
Is Salesforce already set up with SaaS and PaaS options for Heartland Restaurant?	86
Who do dealers contact to request sample/seed databases?	86
Are there marketing materials available for customers or End Users?	86
How is the product being demoed in the training sessions? What application is used?	87
Does the KDS count as a terminal license?	87
Where can I find up-to-date pricing information for Heartland Restaurant?	87
Can dealers charge merchants at cost for equipment and software?	87
Are things like Skip The Line, Scan to Pay, and Loyalty included in the monthly charge for Heartland Restaurant as well?	87
Will the Pass-Through option in Salesforce remain available to dealers selling Heartland Restaurant for additional monthly revenue?	87
As an existing MobileBytes dealer, will I have 2 logins for my existing customer and my new Heartland Restaurant customers?	87
When does the hand off take place for the shared support?	88
Is Shared Support Mandatory for Heartland Restaurant?	88
What does a shared support plan with Heartland Restaurant cover? What times is it available?	89
If we have deals closing using the current MobileBytes model will these accounts qualify towards our first quarter quota for Heartland Restaurant?	89

Overview

This document is a compilation of frequently asked questions and their respective answers regarding Heartland Restaurant.

Important Note: In this document there are references to the [Mobilebytes Knowledge Base](#) which is **not being actively updated** at this time. Please be aware that information present on these links **could be outdated**. It is suggested you **verify and test** yourself **before advising merchants** solely based on information from this knowledge base.

Glossary of Terms

Below is a list of commonly used terms & references throughout this document.

EMV- global standard for chip-based Debit and Credit Card transactions. Stands for Eurpay, MasterCard and Visa.

PAX- Refers to a brand of EMV terminals. Examples include the PAX S300 and PAX D210.

Monetary- A Payment Gateway offered through Heartland Restaurant.

BridgePay- A Payment Gateway offered through Heartland Restaurant.

MSR- Refers to the swipers used for Credit\Gift card transactions in Heartland Restaurant. Stands for Magnetic Stripe Reader.

Ticket- Referred to in other POS systems as an invoice or check. The ticket is where items are entered in for an order and any information for a particular order is stored.

Transaction- Refers to a payment made to a ticket in any tender type form(credit, gift, custom, etc).

Merchant App\POS App\Heartland Restaurant App- Refers to the App portion of Heartland Restaurant which is used by Staff members at the location. This serves as the actual Point of Sale.

Loyalty App\Guest App\Consumer App- Refers to the App facing to customers of the restaurant in which they can manager loyalty, place online orders, etc.

Admin Portal- Refers to the portion of Heartland Restaurant that is accessible by web browser. It is mostly used for configuration but also has reporting features.

User Menu- Found at the top right in the Heartland Restaurant App . Contains many options revolving around daily operations, manager functions, and reporting.

Scan to Pay- Refers to the ability for customers to scan the QR code on a receipt and pay for their ticket through the Consumer app.

Skip the Line- When enabled, it allows customers to place eat-in orders at a restaurant through the consumer app.

Online Ordering\OLO- This refers to online ordering available through a configured website(not through the consumer app).

Left-Handed Menu- Refers to the menu in the tablet that displays on the order screen when viewing or creating a ticket. It will always show to the left or you will need to press the area to the left of the ticket preview(blue and grey lines on left) to open it depending on the iPads screen orientation.



SMS Texting Feature

What are the current capabilities\uses of the SMS Notification feature?

- SMS Notifications\Texting is used for the following if enabled:
 - Sending **Order Up alerts** to guests
 - Configured in the **Admin Portal** under **Location Setup** → **Display Formats** → **Order Up Alerts**
 - Will send a notification when the order is bumped from the KDS
 - Sending **Delivery instructions** to drivers
 - Requires a **phone number** to be configured in the **Admin Portal** under **Location Setup** → **Staff** → **Phone** for the specific employee.
 - Sending **Waitlist Alerts** to guests
 - Alert when added to the waitlist
 - Alert when the table is ready
 - If **Scan to Pay** is enabled under **Location Setup** → **Rooms** → **QR Code** it will also let guests know that they can download the Loyalty App to pay for their meal (requires Monetary Gateway processing).
- Currently, there is no way of retrieving the telephone numbers from loyalty and blasting out text messages.

When do we add texting\SMS to the quote?

- You can add SMS to the quote under the **Cloud-Add Ons** heading in Salesforce.

When SMS Notifications\Texting is enabled is an unlimited amount of texts allowed?

- Yes, while there is a monthly charge associated with this feature, there is no cap on the amount of notifications that can be sent within a certain timeframe.

Are SMS texting features available for texting copies of receipts to customers?

- No, SMS texting features are intended for notifications only.

How do you enable and use the Waitlist option with text alerts?

- **SMS Notifications** must be enabled.
- On the Heartland Restaurant App go to **Manager** → **General** → **Waitlist** and check that option.

Will my Demo Accounts for my Dealership have SMS Notifications enabled?

- Yes, Dealer **Demo** accounts will have this feature enabled.

Will the SMS notification feature still work in Demo Mode?

- Yes, SMS notifications will still function in Demo mode if they are enabled. See this [Question\Answer](#) for more information on Demo Mode.

How do I terminate or disable SMS notifications?

- To turn off this feature you will need to reach out to Orders@heartland.us.
- There is not a toggle available to switch on and off on the fly.

Payment Processing Integrations

What credit/gift processors does Heartland Restaurant currently support?

- Please see our Processing Matrix [here](#) for available processors and details surrounding them.

How do I know what Processor configuration will work for my merchants?

- There is a tool available to assist you in determining your options for each merchant found [here](#).

What MSR devices are supported with Heartland Restaurant?

- The **ID Tech Unimag II**(Part# *ID-80110008-001*) is the only supported MSR device. It can be ordered encrypted(required for credit card processing) or unencrypted.

How do we order MSRs for a merchant? Is the process different for an Encrypted MSR?

- MSRs can be purchased through Salesforce. When purchased through Salesforce you will have an option for Encryption.
- Please note that if the MSR will be used for credit processing purposes it will need to be encrypted for the specific payment gateway(ie Monetary or Bridgepay).
- You can order MSRs through other vendors using the Product code for the device.

When would I order an unencrypted MSR?

- MSRs must be encrypted if they are to be used for processing credit cards.
- The only events in which an unencrypted card reader will be ordered is:
 - If it is **only** being used for certain gift options(ie Powercard, Mobilebytes gift, etc).
 - If you will be processing Heartland Gift outside of a PAX device.

What kind of EMV devices can be used with Heartland Restaurant?

- **PAX**
 - PAX S300
 - PAX D210(wireless)
 - PAX SP30
 - **Monetary:** Please note wired and wireless cannot be mixed. A Trancloud Hub is required for Monetary EMV Devices.
 - Ingenico iPP320
 - iSMP4(wireless)
- Please see our Processing Matrix [here](#) for more details.

How are PAX devices ordered?

- PAX devices with Heartland processing may be ordered through Salesforce.
 - Heartland POS would provision these devices for the dealer.
- If any other processor is intended to be used with a PAX the devices would need to be ordered through a vendor.

How do I configure a PAX D210 for Pay at the Table?

- Please see this [document](#) for details on how to configure this.

Can we attach an EMV device for Demos?

- Yes, you can configure a PAX S300 or PAX D210 to be in demo mode.

When a merchant using PAX enters in a phone order, can they enter the payment information on the screen or does it need to be on the PAX device?

- The merchant would need to enter the card information manually on the PAX device.

Is it possible to run a Shared PAX reader aka a PAX reader that links two two different iPads?

- Yes, each iPad can be assigned a single PAX device. One PAX device can be assigned to multiple iPads.
- To configure this go to **Manager** → **Payment Terminals** on each iPad and select the desired PAX device to be used.
- There is an **important consideration** for this: if one tablet is currently running a transaction through the pax it would not communicate with any other tablets until the transaction has been completed.

If we are using another EMV on the back counter for call in orders and we have two terminals which could potentially take a call in order, do we need one extra pax for each terminal, or can the two share one pax for that purpose?

- No, each station would only have one designated PAX. If an order is taken on one station but needs to be completed on another the only way to achieve that is to take the order on station 1 - Send/Print that order - Resume the order on station 2 and then complete the transaction with the PAX on station 2.
- The transaction must begin and end on the same terminal.

If a merchant only uses a direct integration without a payment gateway, what features/functions will be unavailable?

- The PAX is the only integration available without a gateway currently. It will ONLY provide EMV support through the POS application.
- Without a gateway, you will NOT have the ability to do credit card processing for Kiosk, Online Ordering, Scan to Pay, Skip the Line or Order Ahead. If a merchant requires any of those features they would need to be set up to use either the BridgePay or Monetary gateway.
- Please note that PAX and a gateway can be set up at the same time on a merchant location. You do not have to choose one or the other.
- Please see our Processing Matrix [here](#) for more information.

Is it possible to have both a PAX device and an MSR device assigned to an iPad?

- Yes, you can have both an MSR and a PAX device operational at the same time on a single iPad.
- Please note the MSR processing would be through the Monetary or BridgePay gateway.
- Please refer to our Processing Matrix [here](#) for more details.

Can Heartland Restaurant run with a Mix of MSR and PAX in store? For example, if a merchant has a physical store location(PAX) and a food truck(MSR).

- Yes, A mix of PAX and MSR may be used together in one store. A single iPad can have an operational PAX and MSR at the same time. Please see our Processing Matrix [here](#) for details.
- There are considerations with food trucks. In most situations a merchant with a food truck should have a location for the physical store and a separate location for the food truck. Please see this [Question\Answer](#)

If a merchant has PAX EMV set up and a payment gateway via an MSR, can they use them interchangeably?

- Yes, one transaction can be ran on PAX and the next transaction can be ran on the MSR.
 - It is always recommended that merchants process through the EMV device whenever possible.

Are offline transactions supported for EMV and MSR?

- Offline transactions are only possible through an MSR. There is not an offline option for EMV.

Can both Monetary and BridgePay run offline transactions?

- Yes, Monetary and BridgePay can be run offline via an MSR integration.

Can you restrict the amount of transactions or the amount of a single transaction that can be processed while offline?

- No, this is not currently a feature of Heartland Restaurant.

If offline transactions are performed by merchants running on Monetary or BridgePay, will transactions still get a Pre-Authorization as they normally would when they are online?

- No, if transactions are done offline then they are never getting a real approval. The offline transactions would have to be pushed through again once the internet is restored.
- If a transaction is run offline, you never know if the card actually has the funds or not so it is possible the card could be declined when an actual approval is attempted.
- BridgePay and Monetary do not technically have a Pre-Auth:
 - BridgePay can be setup run on Auth/Capture
 - This means that a transaction will not batch unless a tip has been entered to finalize the transaction.
 - But, if a transaction just has an auth and was not captured and the merchant needed to run the Auth for a different amount, they would need to void the transaction and have the card present to run it again.
 - Monetary can only be setup to run on Sale/Adjust
 - This means you can void a sale before it has batched and then use the credit card token attached to the ticket to re-charge for a different amount. You would not need to run the card again.

If a merchant uses an EMV solution but, also uses an MSR integration with a payment gateway and their location goes offline what steps do they need to take to enable offline transactions?

- To enable offline transactions you must check the setting under **Location Setup** → **Settings** → **Transaction Settings** → **Offline Transactions** in the **Admin Portal**.
- Once this is checked if the POS is offline it will allow offline transactions to be completed through the MSR. It will show as an Offline Approval if it was processed offline.
- There is also a setting that can be used to Force offline transactions. The staff member must have the **Force Offline Mode** permission checked under **Location Setup** → **Permissions** in the Admin Portal.
 - It is then found in the Heartland Restaurant App under **Manager** → **General** → **Force Offline Credit Card Processing**.

Are there any special steps to Authorize Offline Transactions once back online?

- **Yes**, offline transactions do not automatically Authorize when the tablet comes back online. You can manually Authorize them in one of two ways:
 - **In Bulk:** The merchant can go to **Manager** → **Daily Review** in the Heartland Restaurant App and then select **Authorize All**.
 - **One at a time:** The merchant can navigate to the desired ticket and select the transaction in the **Ticket Preview** screen. Next they can select the **Auth** button to authorize the single transaction.

Who is responsible for setting up a payment gateway?

- The Reseller would submit an order for processing through a Payment Gateway.
- Order Fulfillment would then unhide the area in **Location Setup** → **Payment Gateway** for the processors that are selected so dealers can enter the appropriate information.

Are there fees for using a Payment Gateway for processing? Does the Payment Gateway charge the fee directly to the Dealer or Merchant?

- Processing fees for payment gateways would be handled by ordering processing through Salesforce.

Is there a Pay-at-the-Table option currently available for Heartland Restaurant? If so, can EMV be used for this?

- Yes, the Kiosk integration is essentially a customer self pay/self order terminal but can only do transactions via an MSR.
- The Pay at the Table scenario can be accomplished with the iPad and a wireless CC terminal, PAX D210 or Ingenico iSMP4 with the Monetary Gateway.

Is EMV for a Kiosk supported?

- No, Currently only swiping via an MSR is supported for a Kiosk.

Is NFC to NFC for Apple Pay supported with Heartland Restaurant?

- This would be dependent on the pin pad device, not the Heartland Restaurant application directly.

What processors will require the 3rd Party Credit Card Processing fee?

- Anything that is not Heartland processing will be considered 3rd party Credit card processing.

Is a Gateway (BridgePay, Monetary, etc) required for guests to use Loyalty rewards on Heartland Restaurant?

- A gateway is not required; Heartland Restaurant has its own built in loyalty program.
- For more information on configuring this, please see this [article](#).

Is it possible to turn off the signature on the Sign on screen of a PAX device?

- Through the PAX configuration the on screen signature should be able to be turned off and not required for certain amounts if that's how the merchant would like it to function. There can be extra charges and liability that may come along with doing that.

Does the Credit Card Tab setting under Settings in the Admin Portal only work with an MSR? Does it preauth the card or simply store the card for payment later?

- Credit Card Tabs only function when using the BridgePay gateway with an MSR.
- It will not pre-auth the card, it only saves card data. Therefore, doing this does not guarantee funds are on the card.

Does the feature to move Credit Card Tokens\Information between checks work with EMV?

- This is only supported through an MSR integration currently.

If a customer pays for a check through Scan to Pay is it classified as a Card not present transaction?

- No, It is classified as a tokenized ecommerce transaction, similar to using a mobile wallet.

Dealer Capabilities

How do I copy data to Live Accounts? Can I start creating the menu and setup before a location goes live?

- Please refer to this [document](#) for how to copy information to your own live sites.
- Yes, you can create the menu and setup in a Demo account under your dealership before creating it on the live account. See this [one-pager](#) for a summary of the boarding process and what to do with the data at each step.

When copying a Demo Account to a Live Account will anything be lost?

- Please refer to this [document](#) for details on what transfers when you copy a database

Is there anyway to get dealer credentials if we have not taken the Product Overview Session?

- No, you must attend our Product Overview Session.

When will I as a dealer have my own login to Heartland Restaurant?

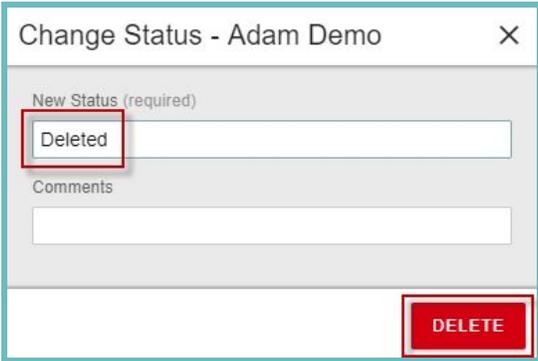
- You will receive credentials after attending our Product Overview Session. However, you cannot be authorized to sell until you have finished all 8 training sessions.

Will my dealership receive a single Admin Portal login for the entire dealership or per user? Can I create my own additional users?

- Currently dealers will receive one login and have the ability to add additional users themselves.

How can I delete one of my Demo Accounts or Demo Locations?

- Start from your Dealership account page.
- Select **Accounts** and select the Account where the desired Demo Database resides:
- Select **Locations**. Select the **Change Status** button  next to the demo location.
- A new window will open. Select the dropdown under New Status and select 'Deleted'. You can add any comments if desired. Select the 'Delete' button at the bottom right to complete the process



Change Status - Adam Demo

New Status (required)

Deleted

Comments

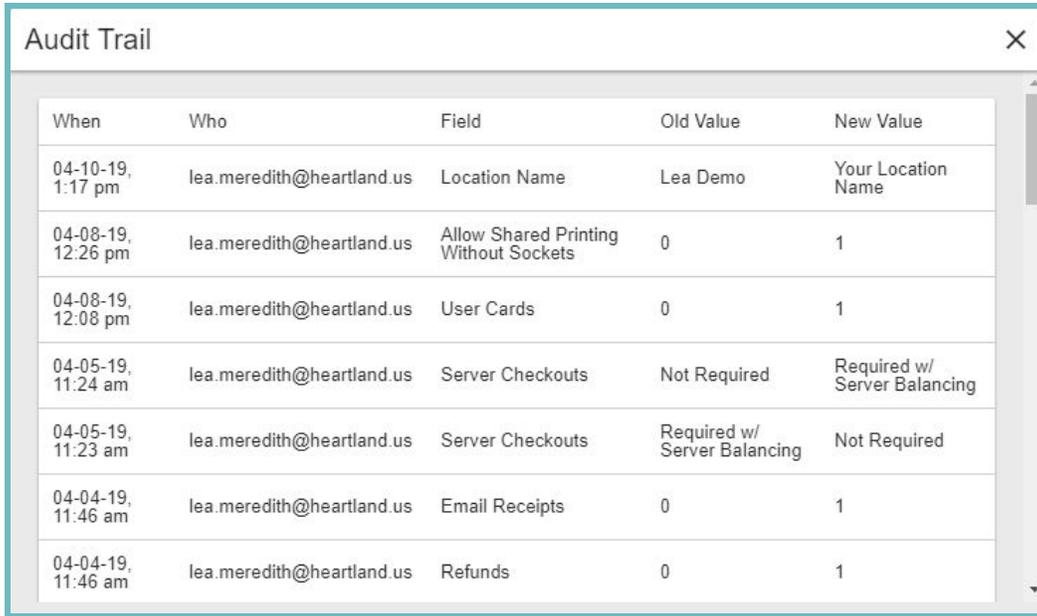
DELETE

Will dealers have permission to change the Account Name and/or the Location Name of a Real/Live location?

- No, dealers are able to change names freely on Demo Accounts/Locations but, this is not allowed on Live Accounts/Locations.
- If a name needs to be changed on a Live Account contact orders@heartland.us.

If I publish something in error to a location, is there a way to rollback/revert to my previous setup or previous publish?

- Once changes are published they happen fairly quick. There is not a way to undo them.
- You can track setting changes via **Audit Trails** available throughout the Admin Portal windows. If an audit log is available for a settings window, you will see a **Clock** button . After selecting it you can see a log of information related to the changes. Here is an example:



When	Who	Field	Old Value	New Value
04-10-19, 1:17 pm	lea.meredith@heartland.us	Location Name	Lea Demo	Your Location Name
04-08-19, 12:26 pm	lea.meredith@heartland.us	Allow Shared Printing Without Sockets	0	1
04-08-19, 12:08 pm	lea.meredith@heartland.us	User Cards	0	1
04-05-19, 11:24 am	lea.meredith@heartland.us	Server Checkouts	Not Required	Required w/ Server Balancing
04-05-19, 11:23 am	lea.meredith@heartland.us	Server Checkouts	Required w/ Server Balancing	Not Required
04-04-19, 11:46 am	lea.meredith@heartland.us	Email Receipts	0	1
04-04-19, 11:46 am	lea.meredith@heartland.us	Refunds	0	1

- You then would have to manually roll back by changing the setting to its previous value as shown in the log to revert configuration.

Is the Audit Trail searchable?

- No, it is not searchable. Technically, you could use **Ctrl+F** or equivalent function to search the page for keywords with the **Audit Trail** up.

Can dealers copy a location that is not their own?

- No, dealers will only have access to locations nested under their Dealership Account.

If I have a live site that I am working with that requests a large amount of changes but, I want to test them first, what can I do?

- You can copy the database from the live location into a new demo location under your dealership.
- To do this you would choose the live location as the one you want to copy from when creating the demo location under your dealership.
- This will not affect the live site and will allow you to test as needed before making changes to the actual live location.

Can you schedule changes to be made to settings\menu in the Admin Portal?

- No, you cannot select a date and time to make changes effective. You can save changes without publishing changes. You could queue up multiple changes by saving them and publish them at a later time.

My screen shows differently compared to my merchant's ipad. Why is this?

- If your screen has a different ratio\orientation than the iPad, the view may look different or have scrolling bars on the side.

Are there any Demo\Seeded databases available for specific types of restaurants?

- Yes, these are currently available to all authorized dealerships to copy into a new demo accounts.
- Gold Standard Demos include:
 - Tony's Pizza
 - The Burger Joint
 - The Beer Brewery
 - Sweet Cones
 - Sushi Samurai
 - Olivia's Italian
 - Jack's Steakhouse
 - Don's Deli
 - Cupcake Bakery
 - Chili Grill Mexican Restaurant

Will Heartland POS be providing Corporate images for Menu Categories, Menu Pictures, Tags, etc?

- These are created and align to our Gold Standard Demos. They can be found in the Heartland Knowledge Portal [here](#).
- These images are approved for dealers to use and redistribute as needed.

Is it possible to transfer one menu template from one dealer account to another dealer account?

- This is not allowed.

Staff\Employee\Shifts Setup

What options are available to configure Tip Outs? Can it be based on Revenue Centers or Report Categories for instance?

- Tip Out Types can currently be configured by Job Type and can be selected for Tips, Gross Sales, or Net Sales.
- If Gross Sales are selected you can restrict by Report Categories(Categories assigned to items for reporting purposes).
- You cannot base Tip outs on Revenue Centers(assigned to rooms for reporting purposes) at this time.
- For more information on configuring Tip out Types please see this [article](#).

- For information on using the Tip Out feature at the POS please see the 'Tip Outs' section of this [document](#).

When going to Tip Out a Staff Member, what is the Suggested share of tips shown on the Tip outs page calculated off of?

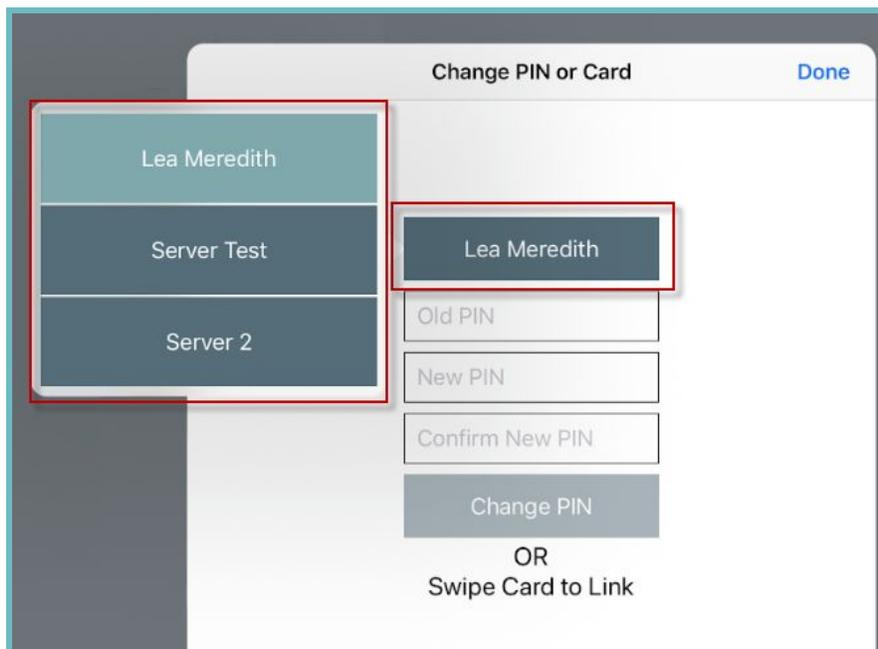
- The amount shown here is calculated as:
- **Suggested Share of tips: % of hours worked x Total Tips for Job type = Suggested Share of tips**
 - **% of hours worked:** Selected Staff's **duration worked in current shift** / Total **duration of all staff** who were **active with the given job type** today = % of hours worked

How are Manager Cards ordered and configured for Heartland Restaurant?

- **Ordering:** Manager/User Cards for Staff Members in Heartland Restaurant can be ordered at this [link](#).
- **Enabling:** Once ordered, you will need to enable the use of them for the merchant. You can do this by going to **Location Setup** → **Settings** → **App Settings** and checking the **User Cards** option.
- **Assigning to Staff Members:** You must log into the Heartland Restaurant App as a Staff Member with **Assign PINs and Cards** checked under **Location Setup** → **Permissions** in the Admin Portal.
 - Go to the **User Menu** and select **Change PIN/Card**.
 - You can swipe a card now to assign/reassign a card to the Staff Member you are currently logged in as.
 - You can tap on the Staff Member's name to select a different Staff Member from the list and then swipe to assign/reassign a card to a different Staff Member.

Can I use Manager Cards on encrypted and unencrypted MSR's?

- Yes, Manager cards will work on both encrypted and unencrypted MSR's.



Is there currently a way to share a Schedule with a Staff Member or export it?

- No, the software is not able to share the schedules between staff members or export them.
- If a version of the Scheduled Shifts was needed you could apply desired filters and take a screenshot.

Are the Scheduled Shifts printable?

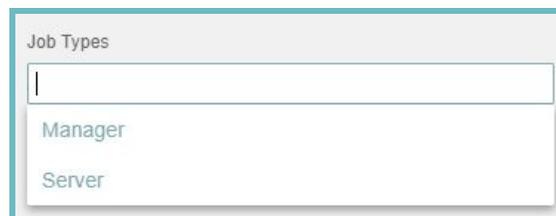
- No, they are not. You would have to take a screenshot of the screen and print or print the webpage it is being displayed on.

Are there any job templates available for common jobs that contain pay rates, permissions, etc?

- There are no built-in job templates when creating new locations.
- However, dealers can create their own templates in demo accounts\locations with settings and menus depending on the type of business they are deploying. These can later be copied over to live accounts or other demo accounts.

When assigning a Job Type to a staff member, do I always have to manually enter it?

- No. While you can always type in the Job Types field under the Staff member to create a new **Job Type** on the fly, you can select a previously created **Job Type** from the dropdown selection that appears.



- This is how many of the objects you create in Heartland Restaurant POS are structured, to cater to your style of creation and assignment.

Is there Staff facing access to scheduled shifts in the Heartland Restaurant App?

- No, there is not.

What is the difference between permissions under Job Type and the permissions under Permissions in the Admin Portal?

- Permissions found under **Job Type** are typically specific to a selected Job's functions.
 - Also, these actions that are restricted here in general cannot be bypassed with a manger PIN(there are exceptions). For example, if Access to other Users Tickets is set to None. You will not be able to open other tickets and cannot use a manager PIN to bypass this.
- Permissions found under **Permissions** relate to the specific user itself and will remain with the user regardless of their Job Type.
 - In general these permissions may be overridden with a manager PIN.

Where is the option to toggle the ability to clock in and out for a Staff Member?

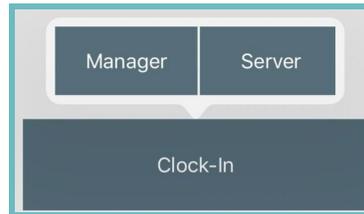
- This is found under **Location Setup** → **Staff** → **Salary** in the **Admin Portal**.
- If it is checked they do not have to clock in and out. If it is not checked clocking in and out is required.

Can an employee clock in and out on any Ipad?

- Yes they can.

How do I configure multiple Job Types for a single employee and how does this look?

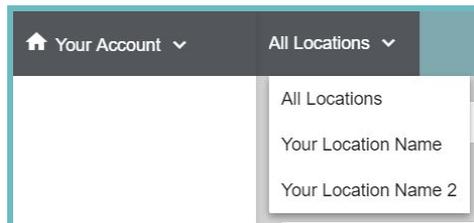
- When creating the **Staff member** in the **Admin Portal**, simply select more than one **Job Type**.
 - A different **pay rate** can be configured for each **Job Type**.
- Once configured, when the employee clocks in, they will be prompted to select the Job Type they are clocking in as.



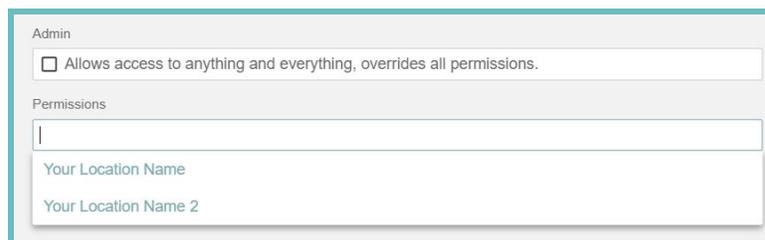
Admin Portal - General Questions

Does Heartland Restaurant support managing a multi-location restaurant from one Admin account?

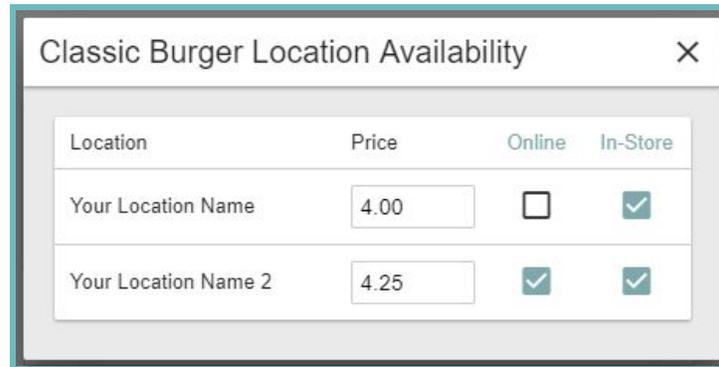
- Yes, it does support this. The Account would typically represent the chain as a whole in which multiple Locations are assigned to it. When multiple locations are added additional navigational features are displayed shown here.



- Users can be added at the account level and given access to all locations, or specific locations only.

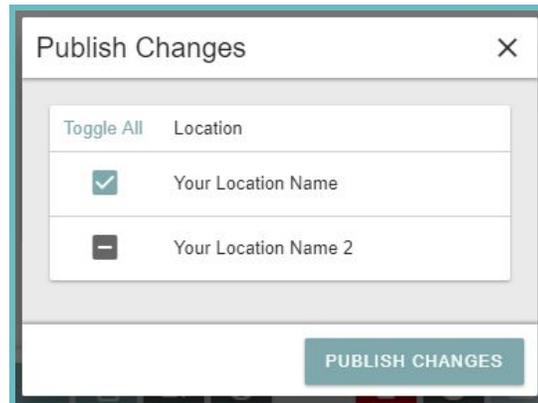


- Features Include:
 - **Central Menu Management:** Menus can be configured at the account level using the **Account Menu** option. When you go to change a menu item you will see a **Location Overrides icon** . This will contain settings that can be configured differently across multiple locations. For **Menu Items** you can configure a **Price** as well as the Online and In-Store Availability of the item.



Location	Price	Online	In-Store
Your Location Name	4.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Your Location Name 2	4.25	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- If there is one location that needs something removed or added, you can log into a single **location** under the Account. Under the **Menu** select the **item**. To **remove** the item select the **Remove From Location** button . To **add** an item, select the **Add To Location** button .
- **Note:** if the item is not currently added to the location, you may first need to select the **Show Account Items** button  found at the top of the list to see the item you wish to add.
- **Central Reporting:** Reporting can be done across all locations from the Account. Available Reports include:
 - Dashboard Reports
 - Daily Summary
 - Items
 - Ingredients
 - Discounts
 - Adjustments
 - Taxes
 - Surcharges
 - Void Reasons
 - Loyalty
- **Central Settings Management:** In a multi-location account, when you go to publish setting changes(at the location or account level) a second window will appear to have you select the locations you would like to send the changes to. You can select the **Toggle All** option at the top left to easily check all the locations.



- **Central Loyalty Program Management:** The Built-In Loyalty program for Heartland Restaurant is configured at the account level. While all loyalty settings will be the same across all locations, the availability of Rewards can be toggled using the **Location Overrides icon** .
- **Image Library:** Images uploaded to the Admin Portal reside in an Image Library accessible for any location or from the account itself.

I see a Save option and a Publish Changes option. What is the difference?

- The **Save icon**  is in the bottom right of any edit window.
 - It is used to save changes made in that window but does not send these changes down to the POS app. If you do not hit save before moving on to edit something else the changes will not stay applied.
- The **Publish Changes icon**  is in the top right of the **Admin Portal**.
 - When this option is selected any saved changes are published to the POS application (there is an 'Are you sure?' window that appears that you must click yes to).

How do you backup and restore databases in Heartland Restaurant?

- Backups/restores are not necessary since all data is stored and synced to the cloud. As long as it is online it syncs all of the data.
- If there is an offline scenario it will queue the data and will send it once it is back online.

Are any keyboard shortcuts available? For example, Ctrl + S to save or Ctrl + D to duplicate an item instead of clicking the respective buttons.

- There are no keyboard shortcuts available.

Are letters and numbers both supported for table names? What if two tables have the same name?

- Yes, you can enter symbols and special characters as well in any combination. Below is an image of some examples:



- While more than one table can have the same name\number, it is not recommended. It can be confusing for Staff when they are attempting actions with tickets or using the Waitlist function.
 - For example, I have three tables all set to be named 12 and I am trying to change the table of the ticket. As you can see it is impossible to distinguish.



Can we change the logo that displays to customers? Can we remove\change the default logo\banner?

- Yes, there are 4 customizable logos: one for the POS itself, one for Online Ordering, one for App Ordering, and one to print on Customer Receipts; and 2 customizable banners for Online Ordering and App Ordering
- To make changes to the logos or banners, simply navigate to the **Location Setup** Section in the **Admin Portal** and select the logo or banner square.
 - **POS logo- Settings**
 - **Online Ordering logo\banner- Online Ordering → General Tab**
 - **App Ordering logo\banner- App Ordering → General Tab**
 - **Customer Receipt logo- Customer Receipt**
 - **Note:** This image must be monochromatic.
- The **Online Ordering** and **App Ordering logos\banners** have **color options** that may be configured with them on the respective configuration screens.

What are the recommendations for images\logos\banners I upload to Heartland Restaurant?

- **JPEG** is the recommended format
- **72 dpi** is the recommended resolution
- Here is a list of recommended **dimensions** for these images:
 - Menu items **768x768**
 - Online ordering banner **2000x2000**
 - Online ordering logo **300x300**
 - App ordering banner **160x160**
 - App ordering logo **70x70**
 - POS logo **300x300**

In regards to the Menu Import\Export Option under Tools in the Admin Portal, would it be beneficial to create an item called template to just fill in the fields with a description of what the field is?

- Yes, creating an item to be used as a template would allow you to see all of the required fields if you decide to create menus in this way.
- Please note some fields do not allow text so, you must have a copy of the import without the template item\field descriptions or delete the template item records from the export before importing.
- Please see this [article](#) for details on Menu Import/Export Fields.
- **Important Note:** Imports cannot be done to **Live** locations. You can do them on Demo locations. Import into a Demo location and then you can copy over to a Live location.

When you are in the Admin Portal does every option you hover over explain what it does?

- Some settings do not need additional explanation and do not have this option.
- Any setting that has a **blue question mark** next to it  will display more information when you hover over it.

When settings are published from the Admin Portal, does the update happen to all the iPads at the site once you log off of one device or do you need to log off and back in on all devices?

- For changes to be updated on the iPads in store, each iPad will need to be logged out to the Login screen and have an internet connection.

Is there an option or translator that is available to help import menus into Heartland Restaurant from other Heartland POS products(ie Dinerware, Digital Dining, Liquor POS)?

- This is not currently available. There is not a direct 1 to 1 import/export for this.
- If you can export a menu to an excel sheet from Digital Dining for example, you would have to align the appropriate settings to the fields available in Heartland Restaurant manually.
- **Important Note:** Imports cannot be done to Live locations. You can do them on Demo locations. Import into a Demo location and then you can copy over to a Live location.

Discounts/Adjustments

What is the difference between a Discount and an Adjustment?

- Discounts are applied to individual items.
 - Simply select an item(s) within the **Ticket Preview** screen and select **Discount**.
 - Discounts can be set to Auto-Apply.
- Adjustments are applied to tickets as a whole
 - Select **Checkout** from the **Left Handed Menu** in the **Ticket Preview** screen. Select **Adjust** to choose from a list of adjustments.
 - Adjustments can be set to Auto-Apply and will do so when the configured conditions are met.

Pricing Rules

How do you configure variable pricing for day parts, happy hours, and daily specials?

- You would accomplish this with **Pricing Rules**. Please see this [article](#) for more information.

Does Heartland Restaurant have Happy Hour capability\timers?

- Yes, you can configure **Happy Hour** times through **Pricing Rules**. Please see this [article](#) for more information on setting this up.

Can you discount individual items within a Happy Hour Pricing Rule?

- **Pricing Rules** can be configured by **Tags, Groups, Item/Size**, and/or **Attributes**. From there you can **Force a New Price, Adjust by Dollars**, or **Adjust by Percent**. Multiple combinations of the above can all apply under one pricing rule. For more information on **Pricing Rules** see this [article](#).

Can you use Pricing Rules to configure limited time Promotions? For example, a Happy Hour for all beers on Saint Patrick's Day weekend only.

- Yes, under **Pricing Rules** you have the ability to set a **Start Date** and/or **End Date** for the promotion.
- From there you can schedule it for the **days** of the week and **times** you would like it to be available.
- You can also configure it to be **specific** to only certain **rooms**. For example, if you only want the discounted beers available at the bar you could utilize this.
- Below is an example of a Saint Patrick's Day weekend **Happy Hour** that has **\$1 beers** from **7pm-3am Saturday** and **Sunday**.

Saint Patrick's Day Weekend Happy Hour

Name (required)
Saint Patrick's Day Weekend Happy Hour

Short Identifier
St Pat HH

Apply Post-tax
 If selected, this pricing will be applied after taxes are calculated and therefore will NOT increase or reduce the original tax amount.

Room Specific
 This price override will only apply to the rooms it is attached to.

Start Date
Sat, 3/16/19

End Date
Tue, 3/19/19

Schedule

Day	Start Time	End Time
Sunday	12:00 AM	3:00 AM
Sunday	7:00 PM	11:59 PM
Monday	12:00 AM	3:00 AM
Saturday	7:00 PM	11:59 PM

Select a Day

Pricing

Section	Force Price	1.00
Beer	<input type="checkbox"/> Affect Modifiers	

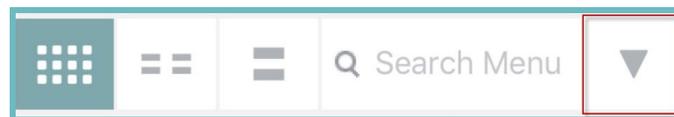
Select Menu Category

Available Online
 Allows this pricing rule to take affect online.

- Here are some **important considerations** with the example:
 - **Start Date**- is the **first day** the Happy Hour promotion is **in effect**.
 - **End Date**- is the **first day** that the Happy Hour promotion will **not** be **in effect**.
 - In the **Schedule** section if you have promos that run past **midnight** on a particular day, you must create two parts. This is why it is configured this way in the example and also why I have my **End Date** set to **Tuesday**(since we account for what is technically Monday morning from 12-3a).
 - I have the **Room Specific** setting checked. When this is checked under **Rooms** you will see a **Pricing** setting and can select this new rule. In this scenario, I only wanted beers at the bar to be discounted and therefore, only added the rule to the Bar **Room**.
- Please see this [article](#) for more information on **Pricing Rules**.

Are Attributes the best option to use to set up Happy Hour items?

- You can assign an **Attribute** called **Happy Hour** to items and assign a **Pricing Rule** based on **Attributes**. Once this is set up, there is a **sorting** option available in the Heartland Restaurant App via the dropdown arrow in the order screen that allows items to be filtered by the **Attribute**.



- **Pricing Rules** can be set to be based off of multiple different Menu options. See this [Question\Answer](#) for more information.

Are there Mass Attributes? For example, how can I change all beers to cost \$1 extra?

- This can be accomplished through Pricing Rules which can be set by Item/Size, Tags, Groups, Menu Categories, Attributes, or Sections. Please see this [article](#) for more information.

Taxes

How do you configure Multiple Taxes to apply to items?

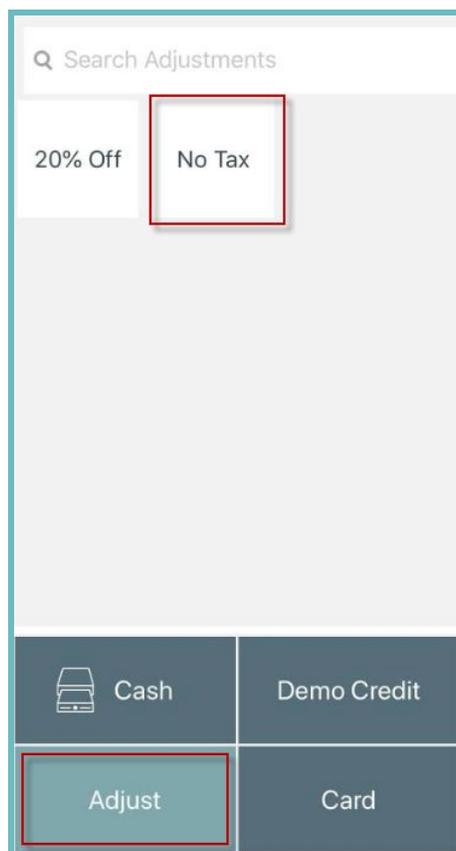
- This can be achieved by using **Tags**. To do so, you would take the following steps:
 - Ensure you have created the desired **taxes** under **Menu** → **Taxes**.
 - Create **Tags** under **Menu** → **Tags** and assign desired items to them.
 - For example, I can name the **Tag** 'Alcohol Items' and assign all alcoholic items.
 - Under **Location Setup** → **Settings** → **App Settings** check the **Room Level Taxes** option.
 - Assign **Taxes** to the **Rooms** under **Location Setup** → **Rooms**.
 - When you select the **Taxes** you can Add specific **Tags** for it to Apply to.
 - For example, I would want to assign my Alcohol Items **Tag** under **Sales Tax** and under **Alcohol Tax** in this window.
 - For more details on configuring **Room Level Taxes** please refer to this [article](#).

Is there a way to make items tax inclusive at the Bar but not the Dining Room?

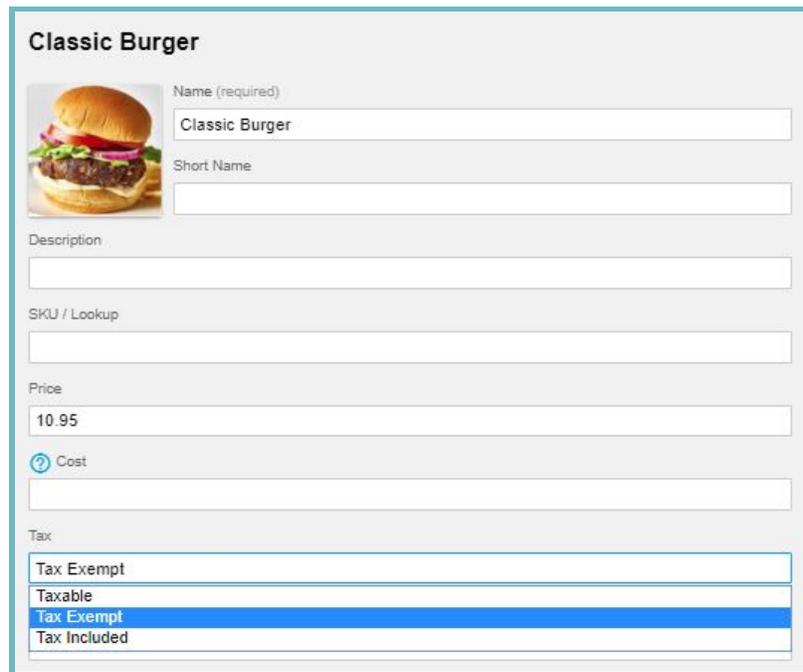
- Yes, tax rates can be set by room. Under **Location Setup** → **Settings** → **App Settings** check the **Room Level Taxes** option.
- Under each **Room** you will now see an option to add **Taxes**.
- For Tax Inclusive items you will also want to consider the **Override Taxability for Tax Inclusive Items** setting found under each **Room**.
- For details on **Room Taxes** and associated settings, refer to this [article](#).

Is it possible to mark items as Tax Exempt within the POS or just within the Menu in the Admin Portal?

- You cannot make specific items tax exempt while ordering in the POS app. However, you can use the **No Tax** option under **Adjust** when checking out a customer to make a whole ticket **Tax Exempt**.



- To make a single **item** innately **tax exempt**, you would need to edit the item in the **Admin Portal** and change the **Tax** setting to **Tax Exempt**.



The screenshot shows a form for configuring a menu item titled "Classic Burger". On the left is a small image of a burger. The form fields are as follows:

- Name (required):** A text input field containing "Classic Burger".
- Short Name:** An empty text input field.
- Description:** An empty text input field.
- SKU / Lookup:** An empty text input field.
- Price:** A text input field containing "10.95".
- Cost:** A text input field with a question mark icon and the label "Cost".
- Tax:** A dropdown menu with four options: "Tax Exempt", "Taxable", "Tax Exempt" (highlighted in blue), and "Tax Included".

Menu Building

Is there a way to duplicate room settings/configuration to a different room?

- No, this option is not available.
- There are a couple of **duplicate** options elsewhere in the **Admin Portal**.
- This is not available for Rooms due to the Room settings being very specific and affecting multiple portions in the app such as ticket behavior.

Can you configure multiple menus for one location? If so, can this be configured to a time frame, or room?

- Yes you can. This is largely controlled by **Groups**(often referred to as **Menu Groups**) & **Sections**.
- As you create items you can configure **Sections** to those items. **Sections** can then be configured to **Menu Groups**.
 - For example, I have a **'Bacon'** item assigned to the **'Breakfast Sides'** section. The **'Breakfast Sides'** section is assigned to a **'Brunch'** Menu Group.
- Under **Menu** → **Groups** you can create and configure these groups.
 - You can configure a **Start** and/or **End** date for this group if desired
 - You can opt to have it available for only **specific days** of the week and **hours** of the day.
 - For example, I can configure my **'Brunch'** Menu Group to only be available from 8am-2pm on Sundays and 8am-12pm on Saturdays and no other days of the week.
- You can assign sections to groups under **Menu** → **Sections** or **Menu** → **Groups**
- Under **Location Setup** → **Rooms** you can assign a **Default Menu Group**. This will be the **Menu Group** that appears by default to order from when a ticket is created in this room.

Is there a Programming Roadmap for Heartland Restaurant? Or in other words a guide on the order to program settings and the menu in?

- Heartland Restaurant is designed to be able to be approached from various levels as far as the order in which things are configured.
- For more specific details please see our recorded [Item Creation Session](#); it explores a 'bottom up' approach for item creation.

Is a Room the same as a Profit Center in Digital Dining?

- Not necessarily, in Heartland Restaurant this would be accomplished by using **Rooms** and **Revenue Centers**.
- **Revenue Centers** are used to define where information reports to. **Rooms** are used to define how tickets behave and are handled when ordered from a particular area. **Revenue Centers** are associated to **Rooms** so reporting can be done by these areas.
- For example, in Digital Dining if you had a Bar **Profit Center**, to mimic this you would create a Bar **Room** and assign a Bar **Revenue Center** to it in Heartland Restaurant.

Are Item Descriptions visible to Online Ordering customers?

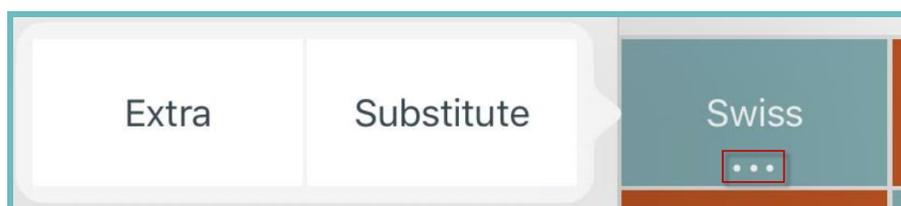
- Yes, descriptions can be seen online.

Is there a multiplier option for ingredients?

- Yes there is, this could be accomplished using **Context Items**.

What are the purpose of Context Items? How do I use them?

- Context Items are used in the app to further modify an ingredient outside of selecting or deselecting it under a Modifier. You can use a multiplier to adjust pricing of the ingredient if the context item is used.
- For example, a Context Item called 'Extra' with a multiplier of 2 would double the price of the ingredients if selected for 2 servings of it would be ordered.
- Or, you can make Context Items with an 'on the side' or 'easy/light' option.
- Each ingredient that you assign a context item can have its own unique multiplier. So you can have a multiplier of 2 for cheese and a multiplier of 1.5 for olives for the same context item.
- If an ingredient has a context item assigned it will show 3 dots below that ingredient in the app. If you long press the item at any time a small window will pop up with the available context items for it.



What price is the Multiplier on a Context Item of an Ingredient increasing?

- It is increasing the price configured on the **Ingredient** at the **Modifier** level. The **Ingredient** itself can have different **prices** across different **modifiers**; this allows the **context item** to multiply off of the appropriate price for the **ingredient** across different **modifiers**.
- For example, An **Item** Cheeseburger has an **Ingredient** American Cheese selectable within a Cheese **Modifier** and the **price** of American Cheese set in the Cheese Modifier is \$0. If A **Context Item** of Extra is used (with a **multiplier of 2**) the system will calculate **2 x \$0 = \$0**.
 - If American Cheese had a price under the Cheese **Modifier** such as \$1 it would calculate **2 X \$1 = \$2**

How do you create an Open Item? Specifically, one that prompts for the name and price when selected.

- When creating the Open item simply check the **Misc Item** option found under **Items** in the **Admin Portal**.
- When ordered, it will automatically take you to the **Modify** screen. This allows both the **price** and the **name** to be edited on selection of the item.

- Note: If you put a price in the **price** field of a **Misc Item**, it will be the **default price** that appears when the item is selected. It can still be changed from this default price.
- For **Staff Members** to select **Misc Items**, they must have the **Miscellaneous Items** permission checked under **Location Setup** → **Permissions**.

Is there a way to Memo a modifier? Or in other words, notate a modifier separate from the parent item on kitchen slips?

- This is not possible. Special instructions are appended to the item as a whole.

Can a wholesale cost be added to an ingredient that the restaurant charges extra for such as cheese?

- There is not an option for this currently.

Is there a way to setup a donation program in Heartland Restaurant?

- This is not currently a feature of Heartland Restaurant.

Can you create custom colors where color options are given in Heartland Restaurant?

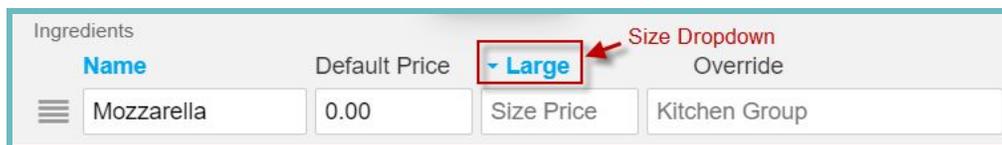
- No, this is not available currently.
- **Note:** You can add an image to an item that will show on the order screen.

Is there a way to prevent Sub Items from showing above the Main Item modifiers? For example, if I have a burger item with a modifier and a sub item of side salad with a dressing modifier. It will show in order as burger, side salad>side salad modifiers>burger modifiers.

- Currently, sub items will always show in this way.

If items are assigned Sizes, can you switch from size to size and have the ingredient price difference carry over across sizes? For example, a pizza with a topping of pepperoni. Pepperoni on a small pizza is \$1, medium is \$2 and large is \$3.

- Yes, on the **Modifier** for those **Ingredients** you can set a **price** for each **ingredient** for each **size**. Simply enter a **price** for one **size** and select a new **size** from the drop down and repeat for all ingredients.



- On the Heartland Restaurant App side this will appear seamless to the merchant in that, if they switch sizes the pricing for the ingredients will change to reflect the size change without having to re-select ingredients.
- **Note:** It is easier to assign **size** pricing **all** of the **ingredients** in the **modifier** first and then select a different **size** from the drop down so each **size** can be configured for all **ingredients** before moving on to configure a new **size**.

Are half and half pricing options available? If so does this reflect when sizing is changed if size pricing is configured for that ingredient?

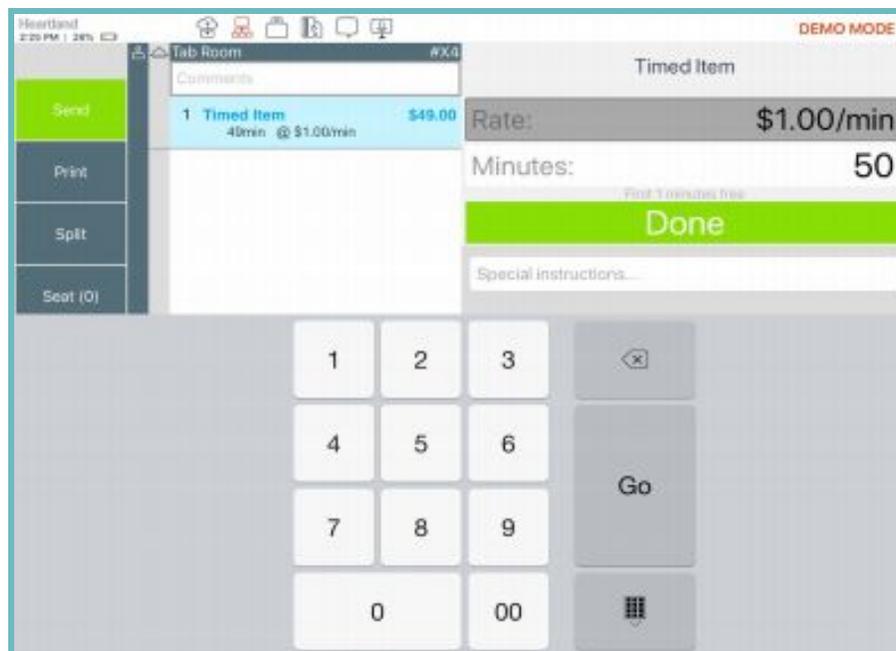
- Yes, there is a **half and half** option under **Menu** → **Items**. It has a few different options surrounding it explained in this [article](#).
- If **size** pricing was set up for **ingredients** on the **modifiers** for the **half and half** configured **item**, it will reflect as the **size** is changed for **half and half** pricing. Please see this [Question\Answer](#)(just above this one) on how to set up size pricing.

With Half and Half pricing enabled, can I still duplicate a single ingredient multiple times? For example, on a Pizza I want to allow Pepperoni to be selected an indefinite amount of times.

- This is not currently possible.

Can I set an item to be measured by time? For example, this could be used to charge by the minute for Pool Tables in a bar.

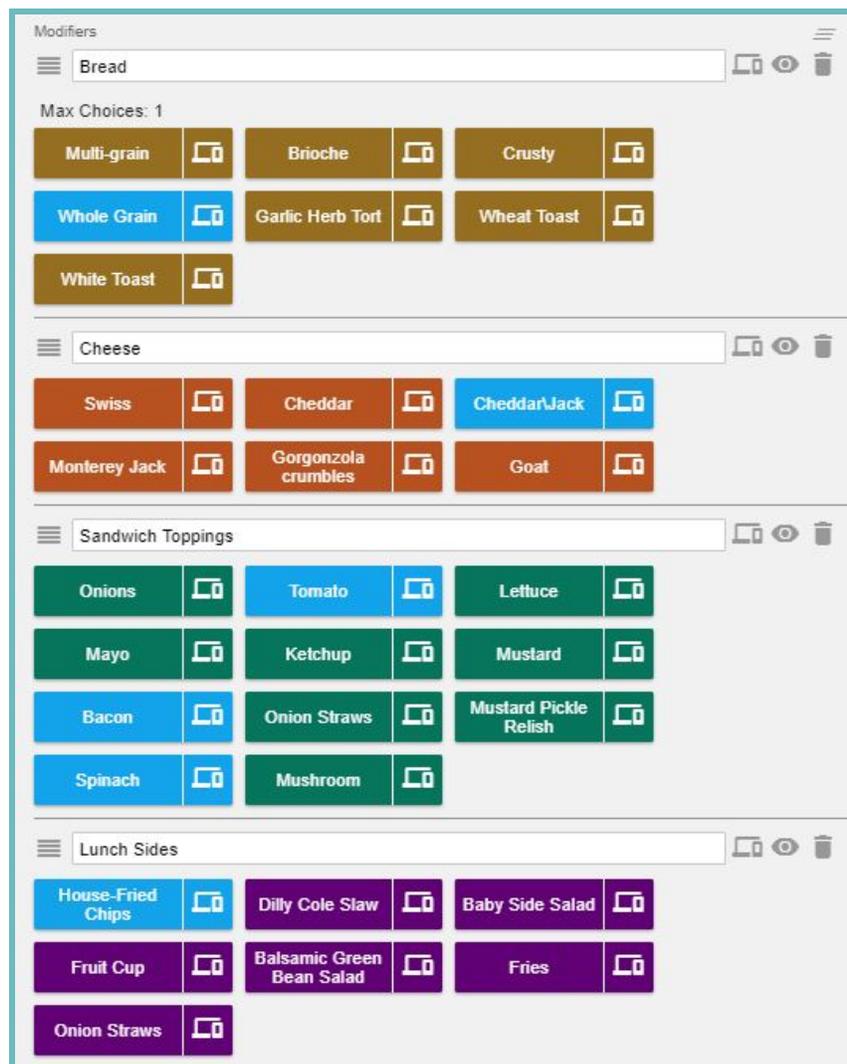
- This is referring to the setting in the **Admin Portal** under **Menu** → **Items** → **Measurement**.
- **Timed item measurements** were released in version **4.1**.
- To configure this you would go to **Menu** → **Items** in the Admin Portal and set **Measurement** to **Per Minute**.
- In the **Tare** box enter how much time is free prior to the charged period beginning.
- Once configured, In the Merchant App you would order the **item** and select **Send** in the **Left-Handed Menu**.
- Upon Returning to the ticket you will see 'Running...' under the item while the clock is ticking.
- Optionally, you can **manually** adjust time on the **item** in this screen.



When setting up items how does default item substitution work?

- This is referring to having **preselected ingredients** in **modifiers** selected; for instance, a Meatlovers pizza will have sausage, canadian bacon, and pepperoni in the meat **modifier** selected by **default**.
- Assuming **Ingredients** and a **Modifier** are created:
 - You would go to the **Modifier** and select **ingredients** you want to be contained in the **Modifier**.
 - If you want **substitutions** of **default ingredients** to be completed at **no additional cost** you will want to check the **Allow Substitutes** setting.
 - If you want **substitutions** to still cost the **full price** of the **ingredient** that is chosen instead of the **default**(defaults are explained further down) leave it unchecked.

- Another setting to consider is the **number of included ingredients**. This will set how many additional **ingredients** can be added at no additional cost.
 - Please note this does **not** include **ingredients** that are **defaulted** to a particular **item**(this will be explained further down).
 - For instance, if you want to allow someone to have up to **3** vegetable **toppings** at **no extra cost** on a 'Create Your Own Sandwich' you would set it to **3**. If you wanted to allow someone to have **2** additional toppings on a sandwich that already has tomatoes defaulted you would set it to **2**.
- Once configured, you can assign the **Modifier** to **items** from **Item** or the **Modifier**.
- To select the **preselected/default ingredients**, go to the **Item** and click the desired **ingredients** from each **Modifier**.
 - For example, I have an item **Spinach Melt**. By **default** it comes with Whole Grain bread, Cheddar\Jack cheese, Bacon, Spinach, Tomato, and a side of House Fried Chips. Below is what it looks like configured in the **Admin Portal**.



- When ordered through the Merchant App, if one of these defaults is removed and something is added in its place, it will either charge or have no additional cost depending on the settings you configured on the **Modifier**. Below is an example of what it will look like with **Allow Substitutes** checked (going off of the above Spinach Melt example)

Comments		Spinach Melt		
1	Spinach Melt	\$8.95	Bread	

	Bread		Multi-grain	Brioche
	NO Whole Grain		Whole Grain	Garlic Herb Tort
	White Toast	\$0.00	White Toast	Wheat Toast
		

- Please note, the workflow may be slightly different depending on your settings on **Modifiers** for **Minimum** and **Maximum** choices. In the example I have a **Minimum** and **Maximum** choice of **1** so I simply need to select a different **ingredient** and it will **automatically substitute** it.
 - If you have a **minimum choice** of **0** it and a **maximum choice** that is not configured (set to **0**) you will have to first **deselect** the **default ingredient** by tapping it and then add the desired **ingredient**.

Can Modifiers be linked together into a Modifier set to interact with one another?

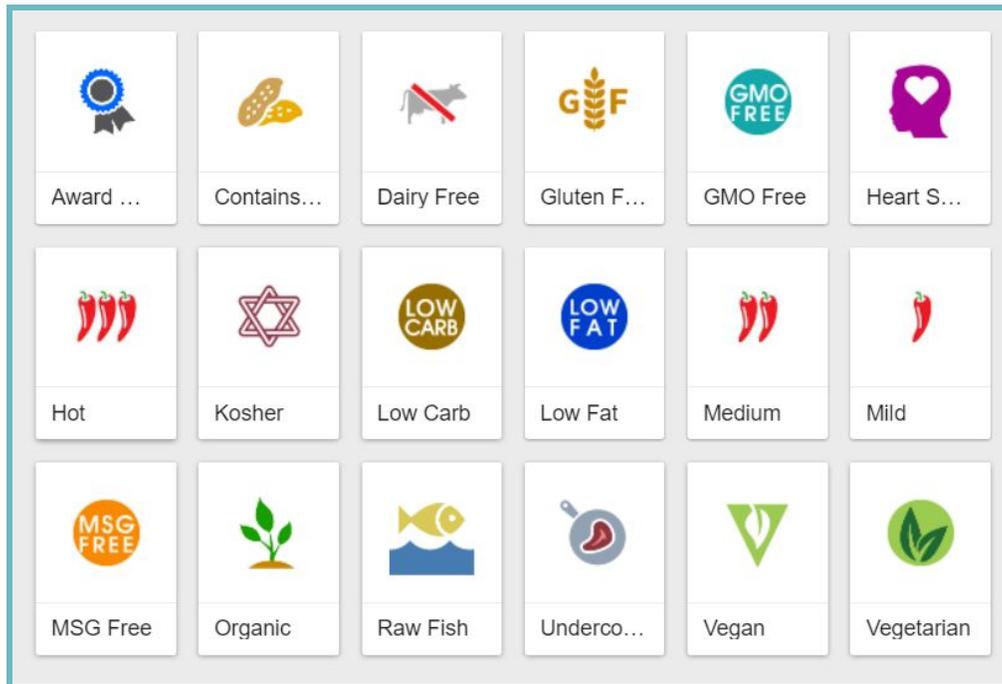
- For example, if I have a 5 topping pizza that has 3 **Modifiers** (Veggies, Meats, Cheeses). **Ingredients** can be selected from any of these 3 modifiers to contribute to this total of 5 allowed toppings.
- This is **not** currently **available**. You can only configure this for each single **Modifier**.

When configuring a Room with tables, is it possible to copy the same table so you do not have to drag and drop each time?

- You can drag and drop existing tables or create new tables. It is not possible to copy an existing table and move that copy.

How large can the Attribute icons be?

- Attribute** icons are configured in the **Menu** → **Attributes** section. To look the best the images should be small, preferably with a transparent background, and clearly represent the attribute name.
- Note: There are plenty of **sample Attribute** images preloaded for use.



How do I configure a Sub Item? For example, a baked potato can be ordered by itself or as a side choice for an entree and it has its own set of modifiers.

- **Sub items** can be configured by first creating the **item** with the desired settings. Then create an **ingredient** for that item and select the **item** under the 'Sub Item' settings. Select the **modifiers** that the **sub item** will show under to be selected.
- In the Baked potato example it would look like this:
 - Create an **item** called 'Baked Potato'. Select desired settings. Add **modifiers** you want to be available when this **item** is selected(aka, potato mod with choices like sour cream, cheese, etc.)
 - Create an **ingredient** to represent the baked potato. Enter the name.
 - **Important note:** You **cannot** name the ingredient the exact same as the item. This will cause an error. Name it slightly different or change the case(item: Baked Potato Ingredient: Baked potato would work fine).
 - Select the Baked Potato item in the 'Sub item' setting.
 - Select 'Side dish' as the assigned modifier(if I order a steak entree and it has this modifier assigned I could now select a baked potato and still customize it).

How do I switch between Modifiers for a Sub Item and modifiers for the Main Item without having to get out of the ticket?

- When **sub items** with their own **modifiers** are selected for an **item** an area will appear at the top where you can switch between the **main item** and its **sub items**. You do not have to exit and reenter the ticket to do this.



How do I get off of the Modifiers screen and back into the Order screen?

- Simply tap in the **white space** on the **Ticket Preview** screen.

Can I change the order that Modifiers and Ingredients show up on the receipt and in the ordering screen?

- Yes, this can be configured in the Admin Portal for both the **Modifiers** and the **Ingredients** themselves
- To change the ordering of the **Modifiers**:
 - Go to desired **Item**. Scroll down to **Modifiers**.
 - Drag and drop the listed **Modifiers** using the **4 line icon**  to the left of each **Modifier**.
 - Changing this will change how it shows up in the ordering screen for servers and on the receipt/kitchen slips.
- To change the ordering of the **Ingredients** within a **Modifier**:
 - Go to the **Modifier** containing the **Ingredients** you want to order. Scroll down to **Ingredients**
 - Drag and drop the listed **ingredients** using the **4 line icon**  to the left of each ingredient.
 - Changing this will **only** change how it shows on the ordering screen. The receipts/slips will not be affected.

Are Sizes the best option to use to configure Doubles, Triple Shots, Rocks, etc?

- Yes, **Sizes** or **Context Items** can be used to accomplish this.
- It really depends on how you want to configure **pricing** and how your menu is set up.
 - With **Sizes** you will configure the **\$ price** of the **item** if that **size** is selected and it is configured on the **Item level only**.
 - **Context items** are assigned to **ingredients**. So, if your menu has the alcohol **items** set up in this way you could apply a **context item** for these options. You would configure a **multiplier** of the **ingredient** price for this setup.

Where are pictures\images for Items stored and how are they changed or removed?

- **Images** are stored on the cloud and are found in the **Image Library** in the **Admin Portal**. If you go directly to the **Image Gallery** you can **delete** images by selecting the **trash can** button  next to an **image** or **add** additional **images** by selecting the **add** button  at the bottom of the screen.
- While editing an **item** you can click on the picture to **add/change/remove** it. From this screen you may select the **minus** button  to **remove** the existing image or the **plus** button  to **upload** a new **image** to select from.

KDS

What viewing options does the KDS application have?

- Please see this [article](#) for detailed information on viewing options for the Kitchen Display System.

Can Heartland Restaurant integrate with a Kitchen Video Monitor?

- Yes, but, the KDS integration only works with iOS iPads.
- Which means you will need an iPad in order to see and bump orders.

Is there an option for a larger monitor for the KDS integration?

- Technically yes. You can use a larger monitor using a lightning to HDMI cable and your iPad would act as a bump bar controller and keyboard to the larger monitor.

Skip the Line

Can Skip the Line only be used through the Heartland Restaurant Consumer app?

- Yes, it can only be used through the **Consumer App**. There is not a separate **Skip the Line** app.

Is there any services Skip the Line ordering is reliant on from the perspective of the consumer's phone or the iPads at the restaurant?

- Yes, it relies on Bluetooth being turned on on the consumer's phone as well as the tablet in store.

Online Ordering

How do I set up Online Ordering? What do each of the settings do under Online Ordering?

- Please see this [document](#) here for details on setting up Online Ordering and its surrounding settings.

Is there a backup iPad that can be configured for Online Ordering if the iPad goes down and cannot come back up?

- There is not a configurable backup tablet for Online Ordering. You would have to **Reassign** to a separate working **tablet** in the **Admin Portal** manually.

How is multi-store Online Ordering set up to select the location? Is this done within Heartland Restaurant or is this directed from the customer's website to the specific location?

- Currently. It is specific to location, so they would need a button to "Order Online" for each individual location.

Is there a companion app for delivery drivers? Or a way to have live tracking of the driver?

- Currently not.

Can you use the Online Ordering Application to take orders, offload them to all other devices(kitchen printer/kds) via usb/file?

- While you can use the Online Ordering website to take orders, you cannot use a USB or File to offload those. The Assigned iPad for Online Ordering must have an internet connection for this scenario.

Could Online Ordering be configured to work with LTE\Cellular Networks in case of a network outage(as opposed to an ISP)?

- The Online Ordering website can work from a cellular network. However, the Assigned iPad must have an internet connection to receive orders and local devices(printers, KDS, etc) must be on the same local network as the Assigned iPad.
 - Please note that Internet connection can be spotty and inconsistent at times when depending on a cellular network.

Does Online Ordering capture emails of the ordering customers? If so is this reportable?

- Yes, if the **Show Email Opt In** setting is checked under **Location Setup** → **Online Ordering** → **General Tab** then it will allow customers to opt in.
- This requires that **built-in loyalty** is enabled.
- Please note if an online order is done and a customer wants to opt in they must also enter a phone number and name(required).
- This is then reportable via the **Loyalty** report. If they opted in the email is visible.

In the Heartland Restaurant App a long press must be done to bring up Context Items(aka, extra, light, etc). How does a customer making an online order access these?

- To the left of the specific **ingredient** that has a **Context Item** associated with it, they will see this button  . Clicking it will open up a list of available **context items**.

- Please note that on each **Context Item** the **Available Online** option must be selected for it to be visible on the **Online Ordering** website.

Can Online Orders be set up to make a sound when they come through?

- You can set up the **KDS** to make a sound when the ticket goes to the **KDS** or is **bumped** from the **KDS**; however, it will do this to **all orders** that go to that particular **KDS** and cannot be separated by order source.
- To set this up on the **KDS** screen select the **settings** menu in the top right and scroll down to **Alert Sounds**.
- From here select **New Ticket** and customize the sound.
- You can configure a **Buzzer** sound on **Printers** to trigger when orders are sent to them as well.
- To configure this go to **Location Setup** → **Printers** and check **Use Buzzer** in the **Admin Portal**.

Can I set up Online Orders to be verified by a Server before they are sent to the kitchen?

- There is not a way to have a server verify an order before it goes to the Kitchen. Online Ordering tickets can be set up to go to an unassigned server but, it will still go to the kitchen without needing a server assigned.

Loyalty

What Loyalty providers are currently available for Heartland Restaurant?

- There is a built-in loyalty option. For more information on this option please see this [article](#).
- There are also a few 3rd Party Loyalty providers such as Paytronix and Como.

Is there a way to import frequent diner information from Digital Dining into Heartland Restaurant Loyalty?

- We don't have any way to import loyalty information.

What is included in reports regarding Loyalty?

- The Loyalty report contains:
 - Customer's phone number(always)
 - Customer Name(if provided)
 - Current Loyalty Level(Bronze, Silver, or Gold)
 - Total Visits
 - Average Spend
 - Lifetime Spend
 - Lifetime Points
 - Lifetime Rewards
 - Unused Rewards
 - Email(if provided)
 - Opted In for Emails(via the Online Ordering website for a location)
- Below is an example of this report

Loyalty Customers											
Phone	Name	Level	Last Visit	Total Visits	Average Spend	Lifetime Spend	Lifetime Points	Lifetime Rewards	Unused Rewards	Email	Opted In for Emails
1231231234	ralph	Bronze	03/01/19, 11:48am	2	\$3.22	\$6.44	0.59	0	0	ralph.test@gmail.com	
1231231234	Lea Meredith	Bronze	03/05/19, 10:02am	10	\$6.82	\$68.17	5.99	0	0	leameredith@heartland.com	Yes

Showing 1 to 2 of 2 Total

Is there a separate app from the Loyalty App for Online Ordering?

- Mobile ordering can be done from the website configured under **Online Ordering** or from the **Loyalty App**, depending on what the site makes accessible from the **Admin Portal** settings.

Is Beanstalk loyalty available on Heartland Restaurant when PAX is being used?

- No it is not available.

Is a Payment Gateway required for Guests to use Rewards\Loyalty on Heartland Restaurant?

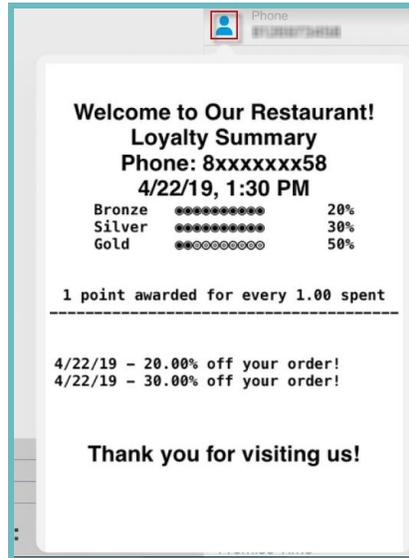
- A gateway is not required to use Heartland Restaurant's built-in loyalty program.
- **Please note** if the merchant using the **Loyalty App**, credit card transactions through that app require a gateway to be configured.

Does Loyalty need to be enabled to allow customers to use Skip the Line through the Loyalty App?

- No it does not. Skip the Line can be utilized without setting up the Built-In Loyalty option.
- It will be able to utilize iBeacon messaging as well without Loyalty enabled.

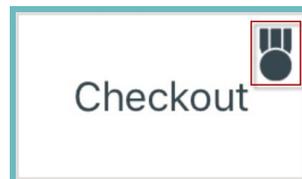
What ways can customers redeem their rewards with the built-in Loyalty program? What does the flow look like?

- Customers can redeem rewards they have obtained themselves using the **Loyalty App** when paying their bill.
- Otherwise, the customer would need to provide the server their phone number to see available rewards from the POS.
- **Checking Points and Rewards at the POS:** To see available rewards/points at the POS a Staff Member would need to tap the **Person** icon that appears to the left of the Phone number in the **Ticket Info** screen. A preview will display where you can view and/or print a summary of points and available rewards for the customer.

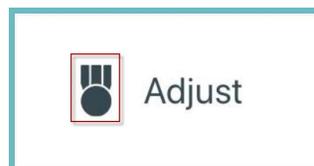


- **Redeeming Ticket Based Rewards**

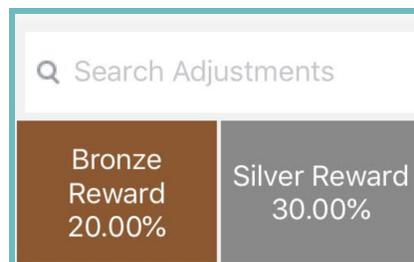
- Select the **ticket** for that customer. Ensure the **phone number** has been entered into the **Ticket Info** screen.
- Select **Checkout**, you will notice a **medal icon** on this button indicating rewards are available.



- On the **Checkout** screen select **Adjust**, you will see a **medal icon** on this button as well.



- In the **Adjust** screen you will see available rewards listed. Select one to apply it to the **Ticket**. In this example this customer has 2 rewards saved up.



- **Redeeming Item Based Rewards**

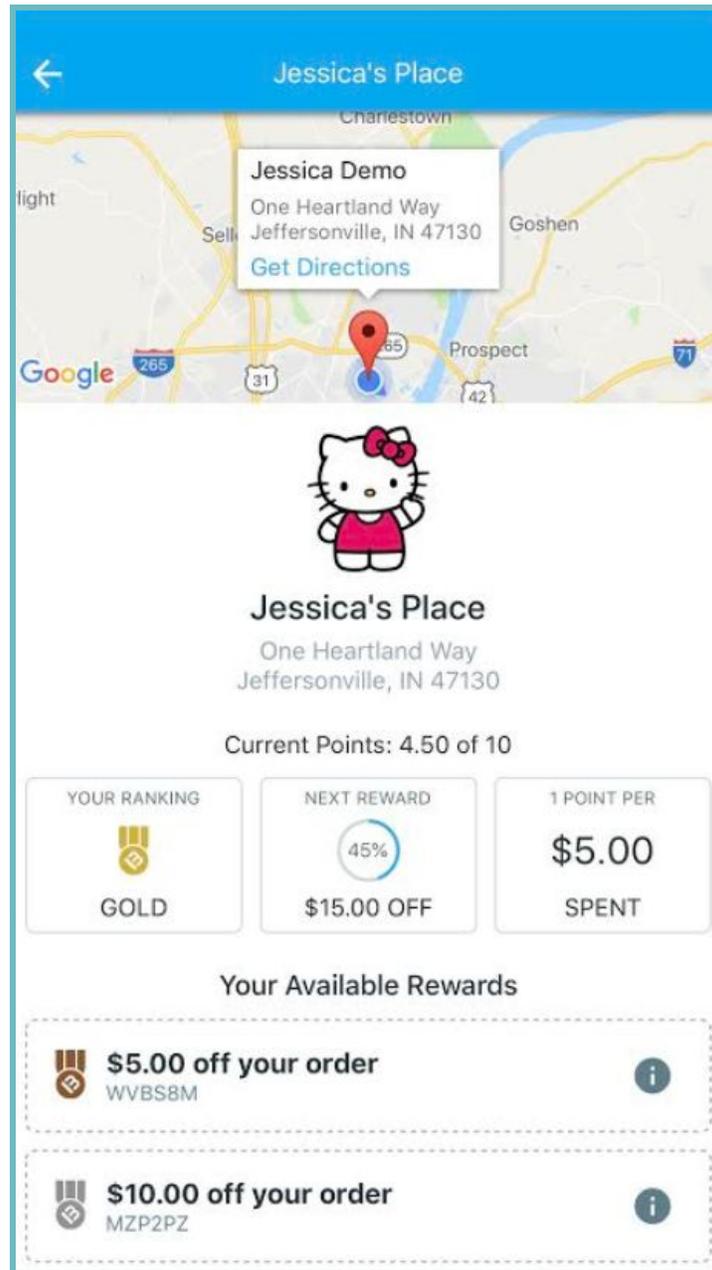
- Select the **ticket** for that customer. Ensure the **phone number** has been entered into the **Ticket Info** screen.
- Select the **item** to apply the reward too.
- Select **Discount** if rewards are available you will see a **Medal** icon on the button



- Select the desired Reward to apply it to the **item**.

How can customer's access their current loyalty points and rewards in the Loyalty App?

- First they would open the app then tap **Explore**.
- They would need to navigate to the desired **location** and tap it.
- A window will appear showing their **points/rewards**(if any) for that **location**.

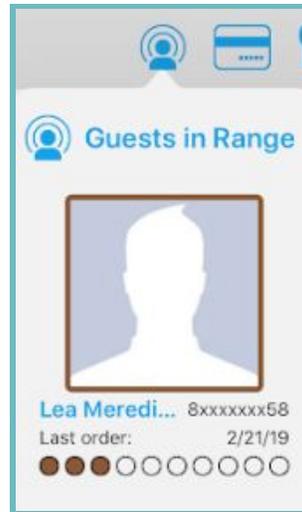


Merchant App

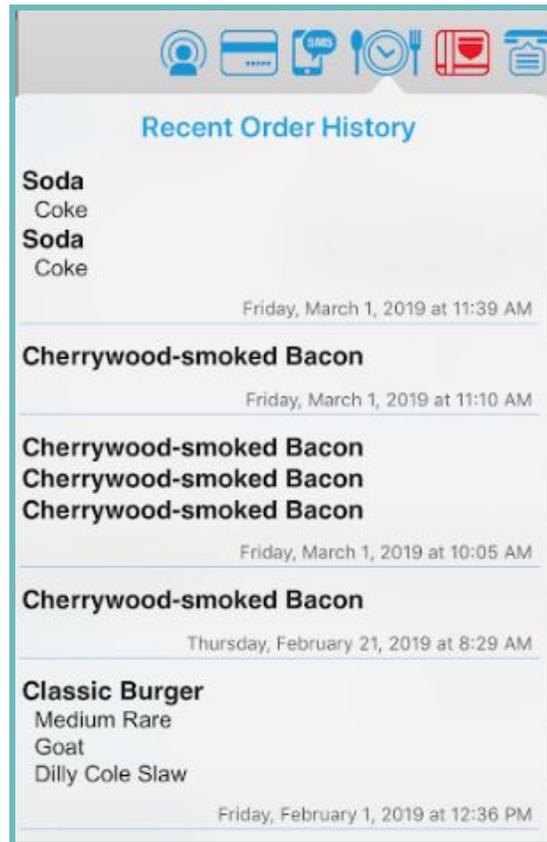
What all can be done within the Ticket Info screen in the Merchant App?

- Please note that these various actions have dependent permissions at the Staff(**Location Setup** → **Permissions**) and Job level(**Location Setup** → **Job Types**) that would need to be considered and are not noted here. There are links to more in depth Question\Answers where it is cited.
- Here is a list of available functions from the Info screen:
- Icons: At the top of the Ticket Info screen there are 5-6 icons that serve different functions if clicked on:

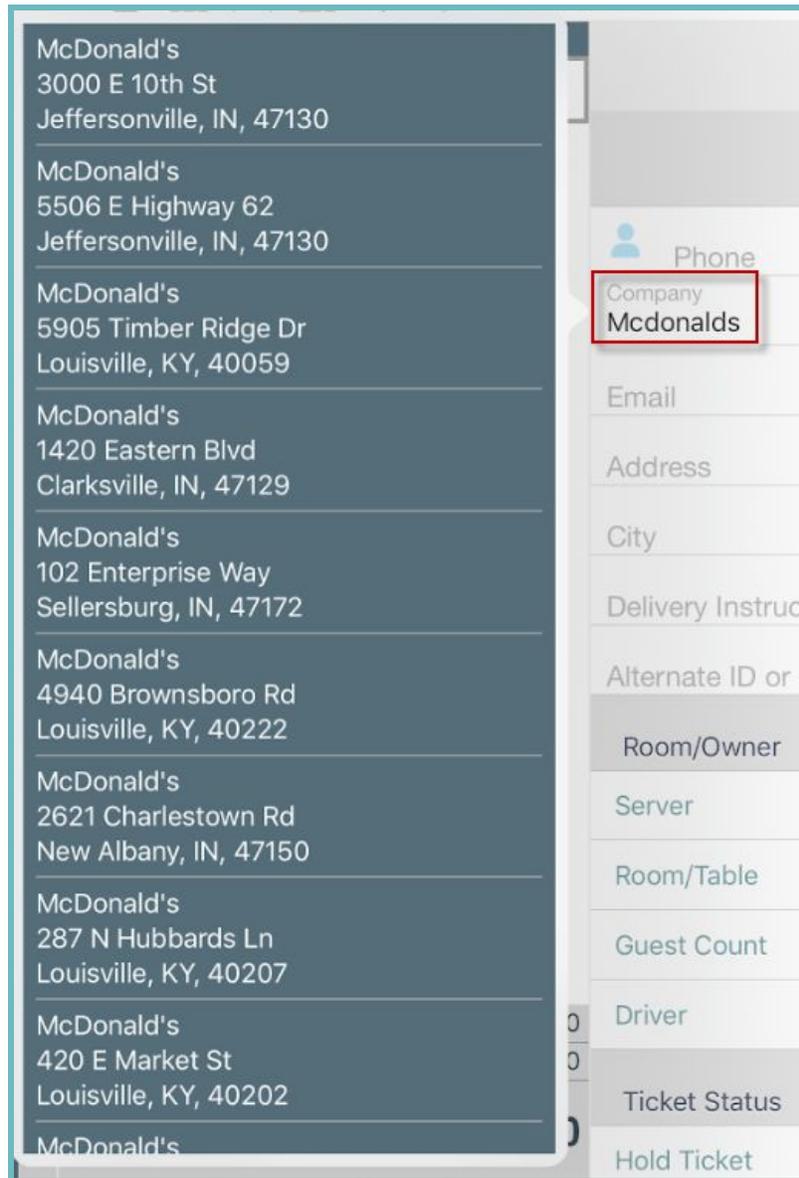
- **Guests in Range** : This icon lets you see guests that are in range(via iBeacon) of the restaurant that use the Consumer App.



- Please note that this depends on the location permissions the customer gave to this application in there mobile device.
 - If you select a Guest in the List it will populate available information automatically on the Ticket Info screen for the customer.
- **Credit Card Tab** : When clicked this will show the Credit card information captured when opening a tab. This does **not** equate to a pre-auth. It just stores the information for use later.
 - **SMS Notification** : This appears only in the **Tab Room Type**. It will allow you to send a text notification that the customer's order is ready. This will require a **phone number** to be entered and **SMS Notifications** to be enabled.
 - **Recent Order History** : If the customer's **phone number** was added to the **loyalty** program, **recent orders** are listed here. You can tap on one from the menu to add it to the ticket.



- **Geocode** : If you enter valid address information in the customer information window in the **Ticket Info** screen you can select this icon to show travel details from the restaurant location to the particular address. There is an option to Print this screen.
 - If a valid address is not entered this icon will show in red.
- **Caller ID** : This must be enabled under Location Setup>Settings in the Admin Portal. Once enabled it requires the use of the CallerID.com WhozzCalling POS Caller ID box.
- **Customer Information**
 - **Guest #** - optional identifier to use(such as when calling out the order)
 - **Guest Name** - Name of Customer
 - **Phone** - If a phone number is added for a customer it effectively adds them to the loyalty program if it is enabled. This can allow other fields to auto populate based on past information if they were already a member in the Loyalty program.
 - **Company** - If you enter a company name here it will automatically search for and give you a selection window to select the desired company(example shown below).



- **Email** - The Email Address of the customer. If they have entered it previously and are a member of the loyalty program there will be an option to auto-populate this field.
- **Credit Card Name** - This is the name on the Credit Card if it is swiped into the system to save the card information.
- **Address Information** - Various fields for the customer's address. This will provide a selection window of addresses if valid information is entered to auto populate the remaining fields.
 - If entered, this will allow the **geocode** option to work.
- **Delivery Instructions** - Special Instructions for the delivery driver. If SMS notifications are enabled and a phone number is entered under the Staff Member these instructions can be sent in a text to the Assigned Driver.
 - An example of this is 'doorbell broken' or, 'house with green door'
- **Alternate ID or Card Number** - Used by some 3rd party and loyalty integrations.
 - For example, this is used with the Paytronix integration for Comp Cards.

- Room/Owner
 - **Server**- Used to transfer the ticket to yourself or another server. For details on this function refer to this [Question\Answer](#).
 - **Room/Table**- Used to transfer the ticket to a different Table and/or Room. For details on this function refer to this [Question\Answer](#).
 - **Guest Count**- This is something optional a restaurant can utilize for reporting purposes. Please note the Guest Count reports separately from Seats.
 - **Driver**- This field is only selectable in Delivery Rooms. It allows you to designate the driver to the order.
- Ticket Status
 - **Hold Ticket**- A time can be entered here to hold the ticket to. This is used to input future orders. This may populate automatically with online orders.
 - **Promise Time**- This time is displayed on receipts as 'Order Due' and indicates the time the customer was given to expect their food.
 - For details on how the Promise Time works, please see this [Question/Answer](#).
 - **Ticket Status**- Indicates the step the ticket is at in the order process(from open to closed)
 - **Paid Status**- Indicates what step in the payment process the ticket is in(from unpaid to Paid in Full)
 - **Created By**- Indicates the Staff member that first created the ticket.
 - **Ordered**- Indicates the date and time when the order was placed.
 - **Closed**- Indicates the date and time the ticket was closed.
- Ticket Actions
 - **Retrieve Card Info**- Used to transfer a credit card to another check. Here is the process for this:
 - Select the ticket that the card needs to be moved to.
 - Select the **Retrieve Card Info** option in the **Ticket Info** screen.
 - Select the ticket or table where the credit card was charged originally.
 - The card will be pulled into the new ticket and set as the card on file.
 - To charge the card with a new total, go to the checkout screen and tap the **Card** button.
 - **Combine Ticket**- Used to combine this ticket with another available ticket.
 - Please see this [Question\Answer](#) for details on how to do this.

What options are available to Split and Unsplit tickets?

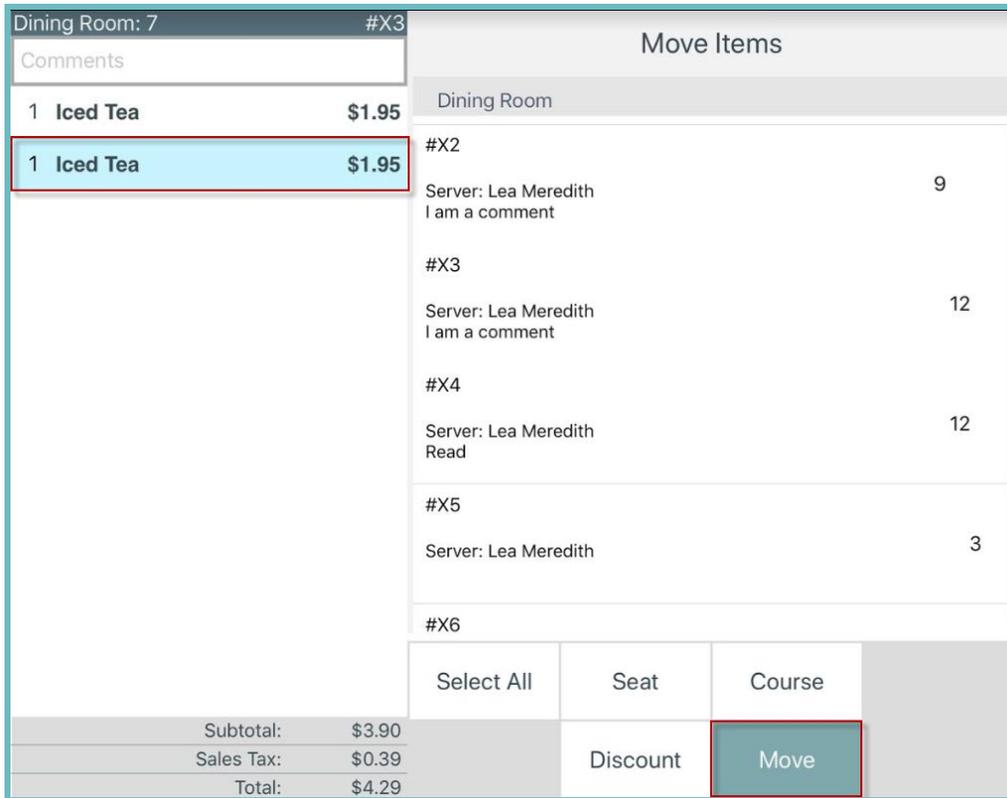
- Everything surrounding Splitting tickets is detailed in the Heartland Restaurant Manager Guide found [here](#). See the 'Split Checks & Tickets' section.

How do you remove a single Check from a Split Ticket?

- To remove a single check from a split ticket you must first reparent all the items to other checks on the tickets using the options detailed in this [Question\Answer](#).
- Once the check is empty of any items select **Send** in the Left Handed menu to save this change.
- If you go back into that ticket you will no longer see that check on the ticket.

How do you move items from one ticket to another?

- The Staff Member must be assigned to a **Permission** group that has the setting under **Permissions** → **Move Items** enabled.
- To move a single item, select the item on the **Ticket Preview**. To move multiple items long press on an item and then select all desired items.
- Select **Move** in the bottom right. This will bring up a scrollable list of tickets and their associated rooms. Select the **destination** ticket.



- It will present a **confirmation message** that you must hit ok to to complete the move.
- **Note:** Even if a Job Types **Access to Other Users Tickets** setting is set to **None** it will still allow them to choose tickets that are not their own to move the item(s) to(if also the setting under **Permissions** → **Move Items** is checked).
- You can move items between checks on a single ticket as well(When the ticket is split). See the below [Question\Answer](#) for details.

How can a Future Order be entered in the Merchant App by a Server?

- Future Orders will need to be enabled first. To do this check the option under **Location Setup** → **Settings** → **App Settings** → **Future Orders** in the **Admin Portal**.
- Once this is selected, begin a ticket and select **Info** from the **Left Handed menu**.
- On the screen scroll down to **Ticket Status**. Tap on **Hold Ticket**. This will allow you to select a date and time to hold the ticket to.

How does the Promise Time work in Heartland Restaurant?

- In version 3.38 and above this option is available.
- Here are some important notes on Printing the Promise Time:
 - **Display Formats** set to **Kitchen Label** for **Print Type** in the Admin Portal will **automatically** print this time without additional configuration.
 - **Display Formats** set to **Kitchen Slips** will have a setting that needs to be checked under **Location Setup** → **Display Formats** → **Show Promised Time** in the Admin Portal to display.
- **Dine In\Carryout:**
 - The option to enter the promised time on the POS is located on the **Info** screen under the **Hold Ticket** option. Because both the hold time and promise time are the same for dine in and carryout orders, both fields will display 'Order Due' with the promised or held time listed underneath on kitchen tickets.
- **Phone In Delivery Orders:**
 - When taking delivery orders over the phone, it is important to enter the estimated delivery time given to the customer in the promise time field on the POS. The system will take the promised time and automatically back out the drive time to print an Order Due time on the kitchen slip. In addition to the Order Due time, the promised time can also be displayed.
- **Online Delivery Orders:**
 - When a customer submits a delivery order online, they are promised a time that the food will be delivered. The promised time is derived by adding the delivery lead time and drive time. The system will take the promised time and automatically back out the drive time to print an Order Due time on the ticket. In addition to the Order Due time, the promised time can also be displayed on Kitchen tickets.

How do you manually enter a Credit Card number on the POS when there is a card not present transaction?

- **Using EMV:** In the **Checkout** screen for the ticket do a long hold on the **Card** button and you will be given manual entry options.
- **Using MSR:** In the **Checkout** screen for the ticket tap the **Card** button and a manual entry screen will be presented.

Can you start a payment tab through an EMV device?

- You cannot start a tab with EMV.

Is it possible to have 0 seats on a ticket?

- Yes, there is an option to have no seats referred to as '**None**' in the Merchant App.
 - You can manually change the seat count to **None** by selecting **Seat** on the **Left Handed menu** and changing it to **None** for selected Items.
- If the location uses the **Seat++** feature, they can configure it to start at **0\None** as the first Seat. Please see this [article](#) for more information on Seat++.

Is there a limit to how many Groups & Sections the Menu can Display in the Merchant App? Does it scroll?

- It does scroll, and there is not a defined limit.

Are managers able to override a schedule with a swipe or passcode for another employee and/or themselves?

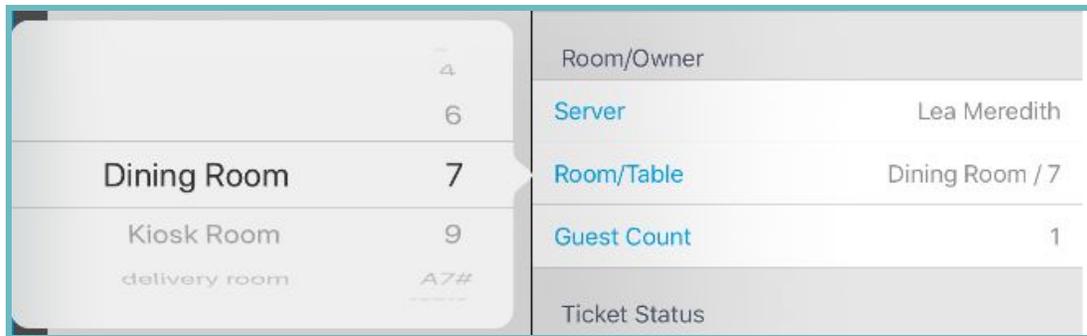
- Yes, the Staff Member must have the **Unscheduled Clock In** setting under **Location Setup** → **Permissions**.
- This will allow the Staff Member to override clock-ins outside of the schedule and also allows them to override employees wanting to clock in early from a break(that has a minimum required length defined) by entering their manager PIN or swiping their manager card.

Can Staff Members have it setup to Auto Clock-In after a break?

- Heartland Restaurant does not have this functionality available for breaks.
- Currently you can configure **Breaks** in the Admin Portal under **Location Setup** → **Break Types** and you have the option to **name** it, select if it is a **paid/unpaid** break, and set a **minimum required length**.
 - By setting a **minimum required length**, employees that do not have the **Unscheduled Clock-In** permission configured will be required to have a manager enter their PIN to clock in early from that **Break Type**.
- See this [article](#) for details on **Break Types**.

Can you move a ticket to a different table?

- Yes, you would view the ticket in question and select Info in the **Left Handed menu**.
- Under **Room/Owner** tap on **Room/Table**. This will bring up a selection window to choose a new table.



- Please note, if this option is **greyed out** then the **staff member** you are clocked in as does not have **adequate permissions** to do this action on their own tickets(In the Admin Portal the setting under **Permissions** → **Modify Table** must be checked to allow for this) or other individual's tickets(In the Admin Portal under **Job Type** → **Access to Other Users Tickets** must be set to **Edit** also to allow this. This allows that job to edit other info as well).

What is the maximum number of split checks allowed per ticket?

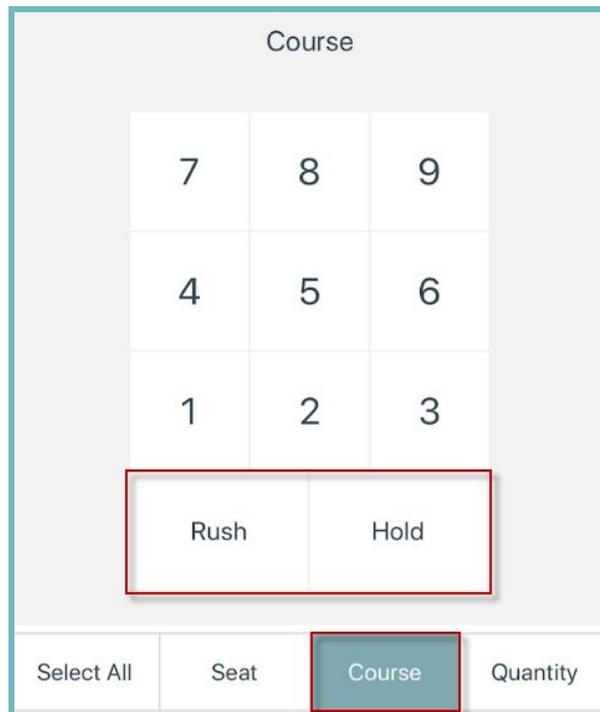
- There is no defined limit.
- In our own testing we have attempted up to 21 with no issues splitting by seat.
- There is a default option to split from 2-9 if not selected by seat.

Can you allow/prevent staff from opening other checks?

- Yes, this can be configured under **Location Setup** → **Job Type** → **Access to Other Tickets**.
 - **None** - Prevents staff member from viewing any tickets that they do not own.
 - **View Only** - The staff member can view , but not make changes to other staff members' tickets
 - **Edit** - The staff member can view and make changes to other staff members tickets.
- **Note:** There may be other dependent permissions under **Location Setup** → **Permissions** in the Admin Portal regarding behaviors they may do on tickets.

Can you Hold and Fire/Rush tickets\items?

- Yes you can.
- After items are entered on to the ticket you can select an item(s) from the **Ticket Preview** screen. Select **Course** and chose **Rush** or **Hold**. It will denote held/rushed items with a letter to the left of the item in the app(**Held** **H** **Rushed** **R**).



- You can also select one item and tap the **Select All** button to select every item on the ticket and adjust at once(to hold or rush an entire ticket).

Does holding an item affect the stock count?

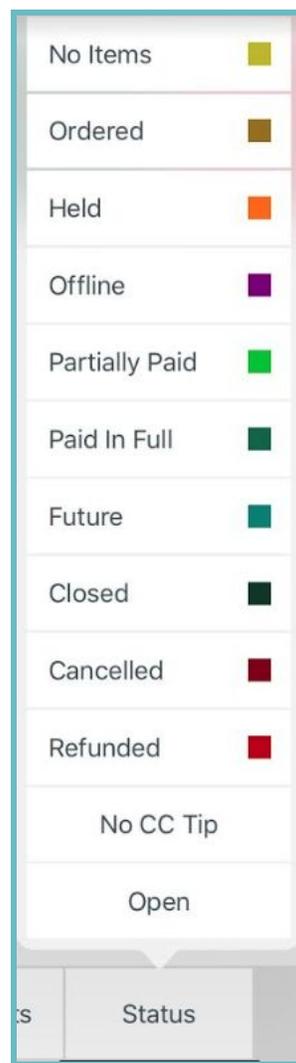
- No it does not. Holding an item is intended to be used to prevent it from going to the kitchen not preventing it from being ordered.

Can multiple addresses for delivery on the same customer be entered?

- Multiple addresses can be stored for one customer. When a customer's info is entered that is already saved in the system, when you tap in the address field you will see a box with the previously entered addresses for this customer. Simply tap on one to choose it for the particular order.

Is there a way to filter\hide certain tickets? For example, I want a server to be able to hide open tickets until tips are paid out at the end of their shift so the screen is not cluttered.

- Specific kinds of tickets can be filtered and searched for in Heartland Restaurant.
 - In the bottom left of the **Rooms** screen select the **Search** option.
 - From here, you can select **My tickets** to only show tickets under your currentStaff member.
 - If you select **Status** a list of filters will pop up. Any combination of filters can be selected. Most of these are color coded and correspond to the color of tickets. Below are filtering options found under status.



Is there a Training Mode option? If so, how can you tell training mode is on?

- Yes, there is a **training mode** available. It can be turned on in the POS app on the desired iPad under **Manager** → **General** → **Device options**. Once it is turned on, it will say **TRAINING User** in front of the person's name who is logged in at the top right.



TRAINING User : Lea ☰

- The **Enable Training Mode** permission must be checked under **Location Setup** → **Permissions** for the **Staff member** to do this.
- In general while enabled, Payments are not processed and orders are not uploaded or synced to other devices. There are some other affected functions. For more information on what is different when in Training mode please see this [article](#).

After you add an item to a ticket, how do you get back to the menu to add additional items?

- Simply tap anywhere in a **blank space** to get back to the menu screen and enter more items.

How do you combine tickets?

- Please note the ability to combine tickets is reliant on **3 permissions** configured under **Location Setup** → **Permissions** in the Admin Portal. **Move Items**, **Modify Server**, and **Split Checks** must all be checked.
 - If those permissions are checked, the staff member can combine tickets as desired even if under **Job Types** → **Access to Other Users Tickets** is set to **None**. If the permissions cited above are **not checked**, even if they have **Access to Other Users Tickets** set to **Edit**, they cannot **Combine Tickets**.
- The ticket you are wishing to combine must have **no pending charges** and must be saved. This can be confirmed by selecting the **Send** button in the **Left Handed menu** (if it is greyed out, it is already saved).
- To combine a ticket select **Info** in the **Left Handed menu**.
- Scroll to the bottom of the **Info** page and under **Ticket Actions** select **Combine Ticket**. A screen will appear so you can select a **room** and **ticket number\name** to **combine into** the **ticket you** are currently **viewing**.
- Tap outside of the ticket selection window. A **confirmation prompt** will appear verifying you want to combine the two tickets.
- The **ticket** you are **previewing** will be the **destination ticket**. The **ticket** you **select** on the **Combine Ticket option** will be **merged under** the **ticket you are previewing**.
 - For example, if I am previewing **Ticket #1** and select **Combine Ticket** and select **Ticket #2**. **Ticket #2** will become part of **Ticket #1**.
- Once combined, each ticket will show under their own respective **checks** and can be viewed separately under the single ticket.
 - For details on naming, viewing, and managing tickets that are split into checks see this [Question\Answer](#).
- You can move and manage how these checks are split using the **Split** option at the bottom right when an item or multiple items are selected. The options available in this screen are detailed in this [Question\Answer](#).

How are local changes(at the tablet) such as changing a printers IP address synced to other tablets? Is there a specific action needed or does it take place automatically within a set period of time.

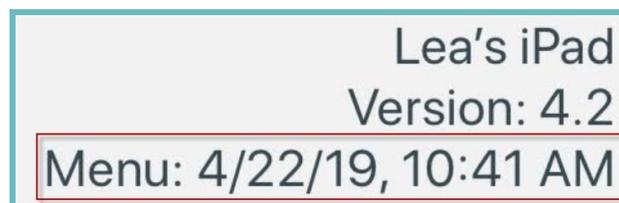
- A local network connection to other tablets is required to receive changes from other devices.
- However, the printer's IP address is actually configured in the Admin Portal and then published down to the tablets. So that particular change would require an internet connection to be received.

If I make a Custom Tender Type will this option show on the Checkout screen?

- Yes, If you create a Tender under the Custom Tenders option in the Admin Portal it will show under Checkout as an option.

If I publish changes when can I expect the configuration to be applied to the merchant's tablets?

- Once you have published changes and see this message  flash across the screen the information will be sent down to the tablets.
- If the tablet is sitting on the login screen it will accept the updates as soon as they are received by the tablet. Depending on the network connection, this could be nearly instant or have a delay. An internet connection is required for changes to be received.
- Each tablet must be logged out and brought to the login screen to receive the published changes successfully.
- **Note:** In the bottom right of the merchant's tablet there is a date and time. This indicates when the last round of changes were received successfully by the tablet.



How often do tablets sync to each other and to the cloud?

- All the ticket data is shared between the devices over the LAN. Local sync between tablets happens instantly, and cloud syncs lazily over the web every 60 seconds. We do this to not slow down the operations of the system.

How do you do a Special Request?

- After an item is selected, a **special request** open text box is available at the bottom of the modifiers. From here you can enter a custom special request.

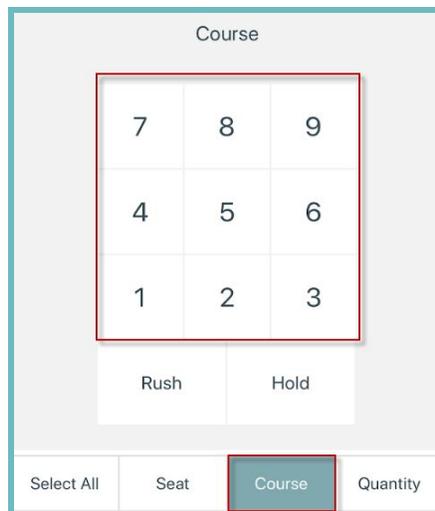
Is it possible to do multiple Special Requests per item?

- Technically no, however the **Special Request** text box does accept the use of the **Enter\Return key**.
- So, you could have it display each request on its own line in the ticket screen despite being entered in the single Special Request text box.
- For example, I order a milk. I can have a special request of 'Extra Ice' and the customer also wants to add a lid. I would enter 'Extra Ice' into the special request field. Hit the Return/Enter key and then type 'Add lid'. Here is how this would show on the ticket.



How does Coursing work? What configuration is available for Coursing? Is there a training session that covers this?

- Yes, this is covered in the [Merchant App](#) session.
- In general Heartland Restaurant’s coursing features offer a few different functions. Below is a summary of what is currently available. Please see the Knowledge Portal links for more detailed information where links are present :
 - [In the App](#): If you tap on an item or select multiple items on a ticket you will see a **Course** option in the bottom right. Once selected you will see a **keypad**. From here you can select the appropriate **course number** for the selected items as well as **Rush\Hold** those items.



- **Rush\Hold**: This is explained in a separate [Question\Answer](#).
 - **Available Settings**:
 - [Items>Default Course](#): This setting allows an item to have a predefined course. For example if I want Fried Pickles to always be Course 1 when rang in I can configure that there.

- **Display Formats>Item Sorting:** You can opt to sort by Course\Seat on desired Display Formats when it is sent to the kitchen. This sorts by Course and then any assigned Seats under the Course.
- **KDS Course Bump Timers:** This setting is configured on a configured KDS iPad. It allows timers to show when the last Course was bumped to help time the courses to follow.
- **Settings>Kitchen Slip Hold Header:** Any text entered here will show in place of the word hold when items are held through the course menu.
- **Settings>Ticket Item Sorting:** You can select for items on the Customer Receipt to be sorted by Seat/Course. This sorts first by Seat and then by Course. If set to None it will just show by order of entry on Customer Receipts.

Is it possible to customize the name of courses?

- Not currently, you can however edit the name for **hold** headers or **seats**.

How do Seat numbers work? Is there a training session that covers this?

- Yes, this is covered in the [Merchant App](#) session.
- The available Seat functions are generally covered [here](#).

Is there a workflow that automatically selects the position\seat number? For example first item ordered, next item. Or a way to select the seat before you enter the item?

- Yes, you can accomplish this by enabling **Seat++** under **Location Setup** → **Settings** in the Admin Portal. For more details on this feature see this [article](#) and refer to the 'Seat++' and 'Seat Behavior' sections.
- Once enabled the **Seat** option will behave according to the settings you selected. It can be manually accessed in the merchant app on the **Ticket Preview** screen in the **Left Handed menu**. You can also long press it for a list of seat numbers and a **none** option.
- There is an option under **Location Setup** → **Rooms** to change the **Seat caption** to something different for example 'bag, plate, box, etc.'.

How do I refund a specific ticket?

- Select the desired ticket. Select **Info** from the **Left Handed menu**. Under **Ticket Actions** select **Refund Ticket**.
- A confirmation will appear to ensure you want to refund the ticket. Once confirmed it will prompt you to enter a reason for the refund.
- A new red version of the ticket will populate with the original ticket number with -REF at the end.
- From here you can enter additional items to refund if necessary and pay out the negative amount to the desired card or tender. It will show up in reports and balance out.

Guest Display

Is there a suggested tip screen on the customer display?

- Yes, if **Suggested tip amounts** are enabled (under **Location Setup** → **Rooms**) for that room it will show on the **Guest Display**.

Kiosk

Can the Self Order Kiosk be configured to suggest a similar item if a certain item runs out?

- For Example, if there are 2 bottles left of Mercer Chardonnay, once it runs out will it suggest St. Michelle Chardonnay.
- This is not currently available in Heartland Restaurant.

Are there any upselling configurations available for the Self Order Kiosk via profiling?

- For example, would you like to add chips, drinks, or super size your order? messages coming through.
- This is not currently available in Heartland Restaurant.

Can we prevent items in the Kiosk from being searched, similar to OLO?

- Yes, the same setting currently influences the Kiosk and the Online Ordering search.
- The setting can be found under each item under **Menu** → **Items** → **Available Online**.

Start/End day/Daily Operations

How long is ticket information retained in Heartland Restaurant?

- **Closed tickets** are removed from the POS App at the configured **End of Day**(under **Location Setup** → **Settings** → **App Settings** → **End of Day**).
- However, these tickets can still be reported on/viewed/reprinted via the Admin Portal under **Reports** or in the POS App under **User Menu** → **Reports**.

How does a Staff member transfer a ticket to themselves or another Staff Member?

- To **transfer** a ticket to **another Staff member**:
 - **Select** the desired **ticket** so it is displayed on the screen.
 - Select **Info** from the **Left Handed menu**.
 - The ticket information will be displayed. Under the **Room/Owner** section tap on **Server**.
 - The current owner of the ticket will be highlighted.
 - Select the desired **Staff member** to transfer the ticket to.
 - Select **Send** from the **Left Handed menu** to complete the transfer.
 - If you select **Exit** instead it will discard this change and **will not transfer the ticket**.
- To **transfer** a ticket to **yourself**:
 - **Select** the desired **ticket** so it is displayed on the screen.
 - Select **Info** from the **Left Handed menu**.
 - The ticket information will be displayed. Under the **Room/Owner** section tap on **Server**.
 - The current owner of the ticket will be highlighted.
 - Select **your name** from the list.
 - Select **Send** from the **Left Handed menu** to complete the transfer.
 - If you select **Exit** instead it will discard this change and **will not transfer the ticket**.

- The ability to transfer tickets to yourself and others is dependent on two settings: one under **Location Setup** → **Job Types** → **Access to Other Users Tickets** and under **Location Setup** → **Permissions** → **Modify Server**. Below is a table that explains how the settings interact:

	Modify Server	
Access to Other Users Tickets	Checked	Unchecked
None	Transfer to Others ONLY	No Transfers
View Only	Transfer to Yourself ONLY	No Transfers
Edit	Transfer to Others & Yourself	No Transfers

- Important Note: If you are set up with View Only and Modify Server is Checked. You **cannot** transfer a ticket back that you transferred to yourself and you **cannot** transfer tickets you create yourself.

Is there any reporting ticket transfers? If so, how do these transfers report?

- Currently no, there is not reporting specifically for Ticket transfers.

Is there a purchase order function available?

- This is not an available option.

How does Server Banking work with Heartland Restaurant?

- This is configured as a setting in the Admin Portal under **Job Types** → **Cash Transactions** → **Set to Server Banking**.
- Any user with this permission will have the permission and ability to tender cash out of their pocket. They will have the cash button available and can subsequently close out checks to cash. However, this will not pop the cash drawer. Also, any user with this job type will only be able to tender cash to a server bank. They will not have the ability to run a physical drawer.
- Please refer to this [document](#) for more details on using Server Banking.

How are Server Checkouts performed? Can one be done in the middle of the day to make a 'Drop' when too much cash is in the drawer?

- For details on Server/Cash Drawer Checkouts refer to this [document](#).
- Server checkouts can be done more than once in one day, before the checkout can be completed, all tickets must be closed or transferred to another Staff Member.

Is a sale always recorded under the original ticket owner or the person who closed the ticket?

- It is always recorded under the person who closes the ticket.

When is a sale and a transaction recorded in reporting?

- A **sale** is recorded once the **ticket is closed** and transaction is recorded when it is **finalized\paid**.

Is a Transaction always recorded under the person who initiated it or the one who finalized it? How does affect who gets the tip?

- For example, if a server swiped the card to pre-auth a transaction and a manager inputs the tip and finalized for the server where would it report?
- The **Transaction** will always be recorded under the person who **finalizes\closes** the transaction.
- In the example above the transaction would report under the manager with the tip.

Can you set up Heartland Restaurant so some Staff Members do not know how much cash SHOULD be in the drawer?

- Yes, you can set this up in the admin portal and it would be assigned directly to the **Staff Member**.
- Go to **Location Setup** → **Permissions** and uncheck **Show Expected Cash** for the desired Permission set.
- Then assign that permission set to the Staff member in question under **Location Setup** → **Staff** → **Permission** and select the appropriate Permission set.
- Once selected this is what the Server Report will look like:

TICKET SALES		Cash Summary for Server Test	
Gross Sales	x.xx	Starting Amount	x.xx
Net Sales	x.xx	Cash Transactions	x.xx
CASH TICKETS		Total Tips	\$1.00
#Z16	x.xx	Paid In/Out	
#Z17	x.xx	Expected Cash in Drawer	x.xx
Total	2 x.xx	Expected Cash in Drawer after Checkout	x.xx
CREDIT CARD TICKETS		Pay In/Out	
Total	0 .00	No Cash Pay Types	
DEMO CREDIT TICKETS		Transfer Tickets	
#Z15 tip: 1.00	4.29	Select Staff	0 Open Ticket
Total	1 4.29		
REPORT CATEGORY ITEM SALES			
Uncategorized	6 x.xx		
Total	6 x.xx		
EXCEPTIONS			
Voided Tickets	0		
Voided Payments	0		
Deleted Items	0		
Refunds	0		
TIP BREAKDOWN			
Credit Card	.00		
House Account	.00		
Demo Credit	1.00		
Surcharge Payout	.00		
Service Charge Payout	.00		
Total	1.00		
Tips Due	1.00		
----- CASH -----			
***** Lea's iPad *****			
YOUR CASH TRANSACTIONS			
#Z16	x.xx		
#Z17	x.xx		
Total Tips	1.00		
YOUR TIPS TO PULL IN CASH	1.00		

How do you manage Stock of an item or 86 an item?

- Please refer to this [document](#) in the 'Adjusting Item Stock\Counts' section for details on this.

Does the Stock Item count also include Modifiers and Ingredients?

- No, it only will apply to main items.

If an employee is assigned a drawer at one tablet does it carry over to the other tablet or will it request that they reassign themselves a drawer?

- A single employee can only attach a single drawer under them at a single iPad. This assignment will not carry over between other tablets.
- There is a permission(**Location Setup** → **Job Types** → **Tender Cash Permission**) that affects the staff members ability to tender cash on other drawers attached to other staff members:
 - **Assigned Cash Drawer:** The staff member will only be able to take cash transactions from the drawer that they assigned/attached themselves to.
 - **Any Cash Drawer:** The staff member will be able to take cash transactions from the drawer assigned to themselves **and** drawers assigned to other employees.

If an employee signs into another tablet can they see their live tickets they created on a different tablet?

- Yes they can, as long as the new tablet is online and synced with the other tablets locally.

How do I do a manual card entry with an Ingenico terminal?

- Once you are ready to pay the ticket select **Checkout** from the **Left Handed Menu**. Long press the **Card** option to have the option to manually enter the card.

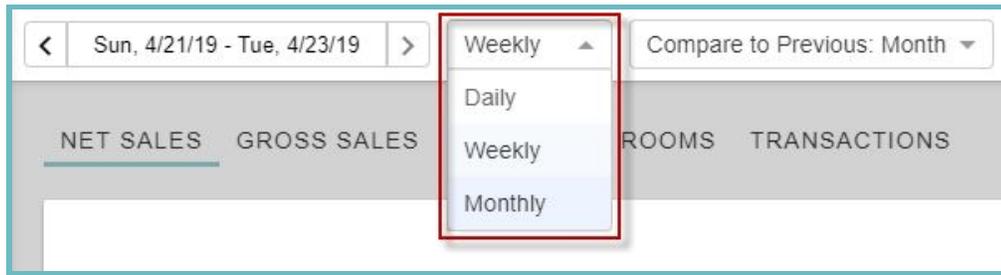
Reporting

Does Heartland Restaurant have a dashboard option to summarize a days activity in real time?

- Yes, this is currently available. In the Admin Portal there is a **Dashboard** option that has 3 viewing options: **Snapshot**, **Sales**, and **Staff**. For more information on the **Dashboard** please see this [article](#).

In the Dashboard can a Date Range be selected instead of a specific Date?

- Yes, in some of the **Dashboard** reporting options:
 - **Snapshot:** while the Snapshot shows weekly, monthly, and yearly comparisons, you can only select a single date at a time when viewing stats.
 - **Sales or Staff:** You can select Daily, Weekly, or Monthly in the dropdown at the top middle to select a range.



- Please note limitations and extra information below for each:
 - **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 I select *Tuesday 2/5/19* from the date selection screen it will show data from *Sunday 2/3/19 - Saturday 2/9/19*
 - **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 instance if I select *Wednesday 1/9/19* from the calendar selection screen it will show data from *Tuesday 1/1/19 - Thursday 1/31/19*
- In the **Compare to Previous** dropdown box you can opt to Compare to the previous **Month, Week, or Year**(If you select Daily in the middle dropdown box all 3 are available, if you select Weekly only Month and Year are available, etc).

Can you customize the options that show in the Dashboard? For example, the ability to enter weather or special events.

- This is not currently possible. You can only customize the times the reporting is shown for and what to compare it to as described in this [Question\Answer](#). You cannot customize the windows that display and do not display.

Is there Real-time Labor Cost\Percentage reporting available in Heartland Restaurant?

- Yes, in the Admin Portal under **Dashboard** → **Snapshot** you can find a labor percentage for the current time to date, week, or month. It has comparisons to the last week, last month, and last year to help see trends.

Sun, 04/21/19	vs. Last Week	Last Month	Week of 04/21/19	vs. Last Week	Last Month	Month of 04/19	vs. Last Month	Last Year			
Sales	\$0.00	▼ 100%	▼ 100%	Sales	\$2,468.94	▼ 62%	▼ 59%	Sales	\$49,645.15	▼ 2%	▼ 0%
Labor	0.000%	▼ 100%	▼ 100%	Labor	28.630%	▲ 5%	▲ 14%	Labor	23.281%	▼ 0%	▲ 11%
0 Closed Tickets Avg. \$0.00			277 Closed Tickets Avg. \$9.68			4845 Closed Tickets Avg. \$11.13					

- Under **Reports** in the Admin Portal and Merchant App the **Labor Summary** report shows detailed information surrounding **Labor Cost** and **Percentage**.
 - If run for a single day it will show the day totals along with an hour by hour breakdown.
 - If run for 2 days or more(weeks, months, years, etc) it will show an overall total for the selected timeframe, daily breakdowns, and totals for each Job.

Are seat numbers when used in the Merchant App, considered a headcount in reports? If so, can it be used to help calculate the guest check average?

- Yes this can be found in the following reports:
 - **Hourly Tickets**
 - Under **Dashboard** → **Sales** a seat count can be found with comparisons to past data under **Net Sales** or **Gross Sales**.
 - **Daily Summary** in these sub sections:
 - **Dayparts**
 - **Revenue Centers** sections
 - **Closed Tickets**(Check averages are displayed in this subsection based on seats)
 - **Note:** For the check averages by seats to be accurate, seats will need to be added to every check to reflect the actual headcount of the table.

How are Gift Cards reported on in Heartland Restaurant?

- Gift Cards are broken out in reporting and are able to be separated from sales if desired.
 - To ensure they are not included in sales, you would check the **Non-Revenue** option in the **Gift Card** item within the Admin Portal.
- A **Gift** report will be available with account numbers and their outstanding liability.
- You can assign the **Gift Card** item its own **Report Category** as well so it can be viewed separately.
- **Gift Card redeems** would show in **Transaction** reports.

Can reports be created in Heartland Restaurant be scheduled to run and emailed out automatically?

- No, this is not a current function available in Heartland Restaurant. Reports need to be ran manually from the Admin Portal or Merchant App.

What current export options does Heartland Restaurant have for Reporting?

- Currently you can export to a **CSV** file or, through the **Print** option you can download it as a **PDF** or print it off..

Can reporting be done remotely from the restaurant\location?

- Yes, it can. Reporting is available in the Heartland Restaurant [Admin Portal](#). All reporting available at the restaurant is available via the Admin Portal.
- The Admin Portal is accessible from any Web Browser and can therefore be accessed by any device capable of using one. An internet connection is necessary for reports to be run. The website is optimized to accommodate mobile devices.

Can you export reports to Excel for custom reports?

- Every report under the **Reports** option has an option to export to a CSV file which can be read in excel.
- If the custom start and end day is chosen that will reflect when exported to Excel.

Is an internet connection or local network connection required to run reports? For example can an offsite iPad still run reports if it has an internet connection?

- You do not need to be connected to the local network to run reports. An offsite tablet with an internet connection could run reports.
- You **do** need an internet connection for this since the information is stored on the cloud.
- Please note reports can also be run from the Admin Portal from **any** device with an internet connection, including mobile devices.

Is a report available that would be the equivalent of a Product Mix Report?

- Yes, you would want to run the Items report. See this [article](#) for information on what it includes.

What does reporting look like for future orders scheduled for upcoming days?

- Generally accepted accounting principles state that no sales should be reported until exchange for a product has taken place. Therefore, Sales and Daily summary reports will not include sales figures until the food has been picked up or delivered.
- If payment is taken ahead of time for a future order it will report on the day the payment occurred.
- On the day the product is picked up or delivered, the daily summary will reflect the sales, and the transactions report will show a balancing payment taken on a previous day.
- During closing procedures on days prior to the future order the ticket will be listed but it will still allow for a green check mark for Tickets in the Daily Review screen.
- Please see this [article](#) for more information on future orders.

Troubleshooting\Error Messages

I set up Online Ordering and I am unable to get it to work properly. What did I miss?

- Please refer to this [document](#) for details on options and setup for Online Ordering.

How long can Heartland Restaurant run offline?

- It can run offline indefinitely. Certain things will not work such as OLO, Kiosk, Guest App, CC Transactions(if offline transactions are not enabled), and Reports. Printing, KDS, and local synchronization will be okay while offline.
- Please see our document on Offline Capabilities [here](#).

Do you need one iPad with more memory for offline operation?

- Orders are cached until the internet connection is restored. Memory utilization is minimum, larger storage is not needed for offline functionality

When using the Request Screenshot option under Authorized Tablets in the Admin Portal, does it take a screenshot of the iPad screen or just the Heartland Restaurant App?

- The screenshot will only display what is on the POS app.
- If you have the POS app running in the background but, not showing, the screenshot will still show what is on the app only.

As dealers are we able to remote into a merchant's iPad? If so, are there any known applications that support remoting into tablets?

- You can troubleshoot through Heartland Restaurant itself is via the Authorized Tablets page in the Admin Portal. From here you can take screenshots of the application within the tablet. You can also view any applicable logs coming from the device.
- You could also log into the merchants location on your own iPad via 'Support Mode' to try and find any issues with setup.
- Other applications may be available to accommodate this, but the above is the solution we offer within our software.

How do I switch the database I am currently logged into on the Merchant App?

- To switch between databases in Heartland Restaurant, navigate to **Settings** (iPad settings) → **Heartland Restaurant** and enable **Logout on Relaunch**.
- Once toggled you can close the app completely by double tapping the home button and swiping it away. Upon relaunch, the application will prompt for your credentials again and allow you to select the database you wish to load.

If the iPad designated as the Dedicated Socket Server goes down, will all printing go down? Do any other functions go down with it?

- Yes, all printing will go down.
- If the Dedicated socket server goes down it will also bring down communication to the portal for the other devices tickets to sync up to the cloud.
- If you have multiple iPads you can simply set a different iPad as the Dedicated Socket Server and it will take over where the previous Dedicated Socket Server left off.

How is Wifi configured for the iPads? Don't you typically need a PC?

- This method of configuring Wi-Fi on a router is dependent on the equipment manufacturer of the router.
- Once the router is set up for Wi-Fi you would simply go to **Settings** → **Wi-Fi** and configure desired settings in each iPad.
- In the Admin Portal under **Location Setup** → **Settings** → **App Settings** → **Preferred Wi-Fi Network** you can configure the name of the only network you want the iPads to connect to.
- Under **Settings** in the iPad you can select the Heartland Restaurant App and select **ignore Wi-Fi restrictions**.
 - If enabled, this allows the iPad to connect to a Wi-Fi network that is not set as preferred.
 - If enabled, if the iPad is offline for sockets or network connection the watermarks associated with those will not display.

I set up a live merchant and it is showing DEMO at the top right. What does this mean?

- This means that the account is a Demo Account.
- Live accounts should not show this at any time. Ensure it was ordered correctly or contact support if there is an issue.



DEMO User : Lea ☰

A manager at the restaurant cannot see any options in the Reports menu in the Heartland Restaurant App. Some can see some reports but not all necessary reports. However, all reports are visible on the Admin Portal. Help!

- This is most commonly due to permissions in Report Access. Check if the staff member is assigned to a Report Access option in the Admin Portal. If so, make sure they are checked to be able to see the reports they are needing.
- Please note that there are 3 reports that **only** show on the Admin Portal. These include the Dashboard, Ingredients, and Loyalty reports.
- On rarer occasions, it could be due to certain traffic being blocked on the merchant's network by the firewall.
-

I am getting a window that says Sync In Progress and cannot view or edit any existing tickets. How do I fix this?

- This message is showing because the iPad is in the middle of syncing up to the cloud. If it continues to pop up over a long period of time, there could be an internet connection issue preventing it from completing a sync.



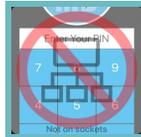
- Once the connection is restored, and syncing is completed the issue should be resolved.
- Note: Syncing to the cloud typically occurs every 60 seconds.

How do you remove the Not on Wifi/Ethernet watermark? What about the No Sockets watermark?

- The **no Wifi watermark** show here is intended to be blatant so the merchant is aware they are offline and work towards getting back online.



- If the merchant's connection is restored it will no longer show indicating they are back online.
- The **No Sockets Watermark** is intended to be apparent as well indicating that printing is currently down so, remediation steps can be taken.



- If there is a special circumstance and it needs to be removed for the time being you can do so by going to the iPad **Settings** → **Heartland Restaurant App** and turning on **Ignore Wifi Restrictions**.
 - Upon restarting the app the watermark(s) will not be present.

If a tablet goes down and a new one is used as a replacement, will transactions for that device be lost?

- As long as the device synced its data to the cloud and locally to other tablets it will be there.
- If the tablet goes down to the point of requiring replacement and it does not have an opportunity to sync up transactions and tickets those transactions and/or tickets may be overwritten or lost.

Will tickets and transactions done in Support Mode impact a merchant's reporting?

- No, these tickets are never uploaded to the cloud. So they never exist outside of the POS.

I cannot get Scan to Pay to work, what should I do?

- First, ensure that **Scan to Pay** is enabled under **Location Setup** → **Rooms** → **QR Code**.
- If you are getting an 'Unable to Fetch Ticket' message, ensure that the socket server tablet is connected to the internet.
 - Also, verify that the Socket Server tablet is set to Permanent and not in **Support Mode**(for dealers trying to demo).
 - Finally, if you have other tablets with higher socket priorities listed, adjust the socket priority to an online tablet and delete any erroneous tablets that are no longer used on the demo account.
- If you run into an issue when trying to make the payment, ensure the preview of the ticket in question is not open in the system(Typically customers will scan from a receipt anyways, this is a consideration for demos).
- If you are a dealer and cannot see your demo locations in the Consumer App to use Scan to Pay from, ensure that you have whitelisted your number under your reseller account.
 - This is detailed in this [guide](#).

Are there any logs that could be looked at which are dealer facing in the event of issues?

- Currently the only logging options available to dealers are found under the Tickets report. If you select a ticket and select troubleshoot you will see the logs available for that ticket.

- If changes are made the audit trail on various windows can be used to see who changed what and when(it also shows what exactly was changed) from and to.
- If you have an issue and cannot find the cause you can contact Heartland Restaurant Technical Support.

If the network is down can orders be loaded via USB?

- No they cannot. The orders are cached and are uploaded once the network connection is restored.

If the internet goes down, exactly how will the POS react and operate?

- Please see this [document](#) for details on what is possible when the internet is down but, the local connection is still up.
- All LAN Printers and KDS will function but any Payment Terminals(EMV) will be down.
- Please note that offline EMV transactions are not supported but, MSR processing through a supported gateway can be configured along with an EMV processor for a location. The MSR supports offline transactions and can be used offline as a backup.

What if I am receiving a message stating, “You’re already attached to a drawer on another device”

- Basically, if you already have a drawer attached somewhere else you will get this message.
- If you sign into the Merchant App and go to the **User Menu** → **Manager** → **Daily Review** → **Cash** you should see a list of open drawers. Hitting the person icon that is attached to the drawer and then scrolling to the bottom of the checkout, you should get an option to **force a Checkout** for the drawer. You will need to make sure any tickets opened under this staff member are closed out before doing so.
- If the system is setup to have multiple people on a single drawer, all staff involved will need to be checked out.

My merchant had an issue with some transactions and was advised to retrieve full card numbers and manually key in the transactions however, the CVV field is required.

- **Monetary:** The form used for manual entry in Heartland Restaurant is governed by Datacap/Monetary. Therefore the CVV requirement cannot be removed.
 - If you are processing through Heartland, a setting can be adjusted on the processors end to allow for mismatches in the CVV field. This would allow the merchant to key in the transactions with any 3 digit cvv number so they can process through the POS.
 - Other processors may have a similar option. We advise dealers to contact the processor to see what is possible to accommodate the scenario.
- **PAX(Heartland):** A setting can be toggled to allow manual entry without requiring the CVV under Card Type in Broadpos.

System\Network Specifications

Can you take an iPad or Kiosk off site for events?

- Yes, you can. It is highly recommended that the Ticket prefix for tablets to be taken off site are different from prefixes of other tablets. This reduces the chance for tickets to be overwritten or lost by another tablet.
- If the offsite iPad or kiosk will not have any internet connection, orders can still be taken but will not sync to other tablets until it is brought online.

- If there is only a single tablet, it would not run into these issues since it would be the only tablet involved.
- Printers and other devices that rely on a wired connection will not work while the tablet is offsite.

Are Static or DHCP assigned IP Addresses recommended?

- It is recommended that you use Static IP Addresses or 'DHCP Reserved' IP addresses when setting up the network for Heartland Restaurant.
- The socket server designation is based off of the IP Address, if some or all devices are set to Dynamically Assigned DHCP addresses it could cause conflicts and issues with uploads when addresses change because it can effectively change the socket server.
- For the sake of standardization you may want to make all statically assigned or all DHCP Reserved.

Is the socket linked to the Mac Address or the IP Address of the iPad?

- The Dedicated Socket Server is linked to the IP Address.
- The Dynamic Socket Server priority is also linked to the IP Address.

Is there a list of recommendations for how to pre-configure iPads for the Heartland Restaurant environment?

- Yes, please refer to our [Tablet Optimization Guide](#).

What's the recommended wireless strength for those carrying tablets to a table?

- There is no direct number, but a high quality connection will produce better results for mobile tablets.

Would an iPad with 32GB of storage be sufficient to run Heartland Restaurant?

- Yes, it is sufficient.

Where can we find the supported\certified hardware list?

- The certified hardware list can be found in the Heartland Knowledge Portal [here](#).

Does a Guest Display or KDS iPad need to be the same or similar device as the iPads used to run the Heartland Restaurant app?

- No, they do not. Please see this [Question/Answer](#). There are some considerations if you choose older models described in this [article](#) under the 'iPads' section.

What is the minimum recommended specs for iPads being used with Heartland Restaurant?

- Heartland Restaurant will technically run on any full size iPad 2 or newer and any iPad Mini 1 or newer. However, there are significant benefits to running the most current versions of the hardware, including processing speed/power, screen size, beacon capability, and longer life with Apple updates.
- Please see this [article](#) for more details on what is supported.

Is there any difference between stationary and mobile tablets in regards to Heartland Restaurant?

- The app itself will run identically on both setups. There are additional considerations with the surrounding equipment though:
 - If wireless then payment terminals may also need to be wireless.
 - Wireless strength will be greatly important throughout the restaurant.
 - This could affect cash handling if cash drawers are not used (instead opt for Server Banking).

Can the Heartland Restaurant App be run on PC/MAC? What about iPhones or upcoming iPod Touch devices?

- While the Admin Portal can be ran from any device with a web browser, the POS application is **only** usable from an iPad.

Can iPads that have a cellular network be used with Heartland Restaurant?

- They can be used but there are considerations:
 - the PAX devices and Printers will not work if they are not on the same local network.
 - If the iPad has an internet connection, it will still communicate with the cloud and see saved tickets.
 - Other iPads would not be able to locally sync with that iPad if it is not on the same local network which could cause unsaved ticket syncing issues
- An application for this is to use an iPad for a remote catering event or, allow delivery drivers to carry a tablet with them for credit payments.

Can multiple iPads be used with a 'Shared' cellular connection?

- It is possible to run multiple devices on a shared cellular connection, for example the Verizon 4G router or mifi devices.

Can delivery drivers take credit payments from an iPad if they have one they take with them?

- Yes, if the iPad has a cellular connection. It would need to be brought back onto the restaurant's network to sync up with other devices locally.

Would Heartland Restaurant be ideal for a merchant who has a 'brick and mortar' store location as well as a food truck using tethering from a phone and still run at the same time?

- It is possible to configure a site with this situation. The food truck and the 'brick and mortar' store may each need to be its own location in the Admin Portal.
- Tethering from a phone, depending on speed, may be an issue since cellular can be spotty and limited at times.
- If the food truck is using hardware that requires a hardware that is not possible (i.e. printers, pax, etc). They would need to be on the same subnet to communicate to necessary devices.

Is it possible to have a Multi-Network Setup for a large location without having to split it into two locations?

- For example a large hospital that has 2 cafeterias on either end. The two cafes are on different wifi networks but wish to use a single location.
- In testing, it was found that as long as you are **not using** the Dedicated Socket Server Printing Method (described in this [Question/Answer](#) with other available printing methods) then 2 different 'ecosystems' could run.
- Each Cafe would need to have their printers and any EMV devices set to their specific DHCP server (DHCP reserved addresses are recommended).
- The tablets would **not** be able to communicate directly with any devices on the other network but, there will be a tablet acting as the local socket server on each network that will report data to the portal.

Printing

When a Future Order is placed does it print immediately? Can this be configured to include the Order Due Date and Time?

- Yes, the order will Print immediately.
- Yes, a Promise time is available in Version 3.38 and above which is essentially the 'Order Due' time.
- Any **Display Format** with a **Print Type** of **Kitchen Label** will automatically show the Promised Time (aka the Due Date and Time)
- Any **Display Format** with a **Print Type** of **Kitchen Slip** will have a setting called **Show Promised Time** listed that can be toggled on or off for this purpose.
- For more information on how the Promise Time functions see this [Question/Answer](#).

Is there a way to request or change the label size? For instance, if I want a 1 X 2 inch label size.

- Currently no, if the Print Type for a Display format is selected as Kitchen Label, it is only intended to print on 3 X 2 inch labels

What is the currently supported label printer?

- The currently supported label printer is the Epson TM-L90 Thermal printer.

What type of labels are recommended?

- The Epson L90 printer labels are *Part No. 111198400*.
- However, Dealer's have reported better performance with Zebra 3" X 2" labels *Part No. 10001962*.

Is there any setup required for the Epson L90 printer for it to work as a label printer?

- Yes, you will need to format the printer for the correct label type. Follow these **exact** steps below to accomplish this:
 1. Turn **Off** the printer.
 2. Open roll paper **cover** (leave open).
 3. Turn the printer **On**.

4. Turn printer **Off** with the **cover open**.
5. Next Turn the printer **On** while pressing and **holding Feed** while the **cover** is still **open**.
6. **Hold** the **Feed** button until the **error** and **power light** are **on**.
7. Once the **error light** is **on**, press the **feed** button **six times**.
8. Next **close** the roll paper **cover**.
9. The printer should now automatically feed labels to remember the label paper size.
 - a. If the printer will not feed paper automatically when closing the cover, the process was done incorrectly and you will need to start over.

Can the printed guest check sort items by food/bev and subtotal prior to discounts being applied?

- Categorical subtotals are not available.

How do you disable QR Codes on the Receipt?

- Under **Location Setup** → **Rooms** → **QR Code** and choose **Disabled** from the dropdown.
- Repeat this for all desired **Rooms**.

How does the Print button work in the Reports screen on the Heartland Restaurant App? Is it different when printing in the Admin Portal?

- The **Print** option in the **POS app** will route to the configured **default register printer** in the **Manager** → **Printers** screen for the iPad it is printed from.
- In the **Admin Portal** if you choose the **Print** option while running reports it brings up print settings based on your browser and type of computer you are running it on.

Does the Print option in the Reports screen on the POS App auto adjust the print area based on the printer type?

- Yes it does.

Is there a way to print modifiers in a different color/font/font size than the items?

- Yes, this is possible using **Display Formats** with thermal printers, impact printers, and the KDS.
- You can chose **Primary Font** settings which will be the font used for **items**. And **Secondary Font** settings which will be used for **Modifiers**.
- Please note **Display Formats** are set to **Kitchen Groups**. So different groups of items and their modifiers could have different formats on each group as well.
- See this [article](#) for more information on **Display Formats**.

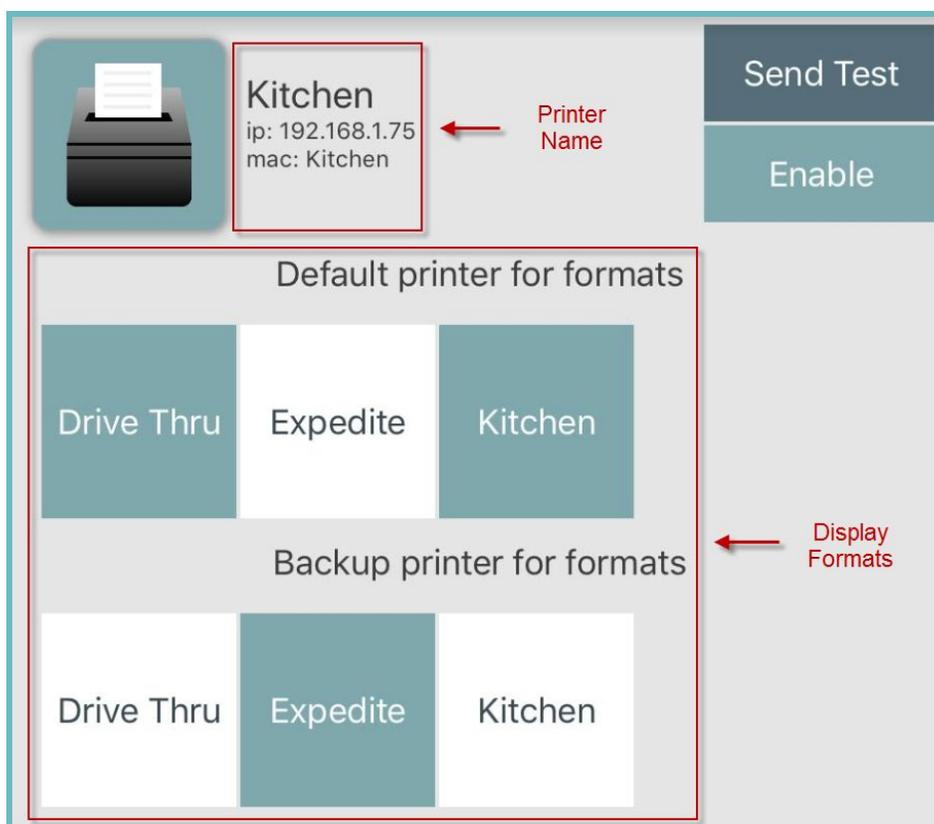
What sorting options are currently available for the ordering of items on kitchen tickets?

- Sorting options are available under **Display Formats**. Options include:
 - **None**- No sorting. All items are displayed in order of entry on the ticket
 - **Course/Seat**- Will sort by Course first and then by seat(if any)
 - **Kitchen Group**- Will sort the items by the order of groups listed in the display format.

- The Order of Kitchen groups can be changed by dragging and dropping them in the desired order on the associated Display Format.

What option needs to be configured to separate how tickets are displayed in the kitchen for different areas or items? For example, if I want Carryout Orders display differently than Dine-in orders.

- **Display Formats** determine what kitchen tickets look like for a particular set of items(assigned in Kitchen Groups).
- **Printer Templates** housed within the Heartland Restaurant app, under **User Menu** → **Manager** → **Printers** → **Templates** allow you to assign **Display Formats** to **Printers**. Under the **Template** you can see the **printers** along with their assigned **Display Formats**.



- In the example, there are a couple of different ways you could go about setting up the Display Format. Settings for Display Formats can be found in the Admin Portal and are described in this [article](#).
- If Carryout Orders are going to the same printer as Dine-In orders you could assign both as default formats for that printer and the printer would print each differently based on the selected Display Format.
- Templates also allow you to have certain printer setups for certain rooms. You can create multiple Printer Templates and use them at the same time.
- Please see this [article](#) for more information on overall setup of printing settings.

What is the reasoning behind using a Dedicated Socket Server vs. using a Dynamic(Priority-based) Socket Server? What are the main differences between the two? Are there any other Printing Methods I should be aware of?

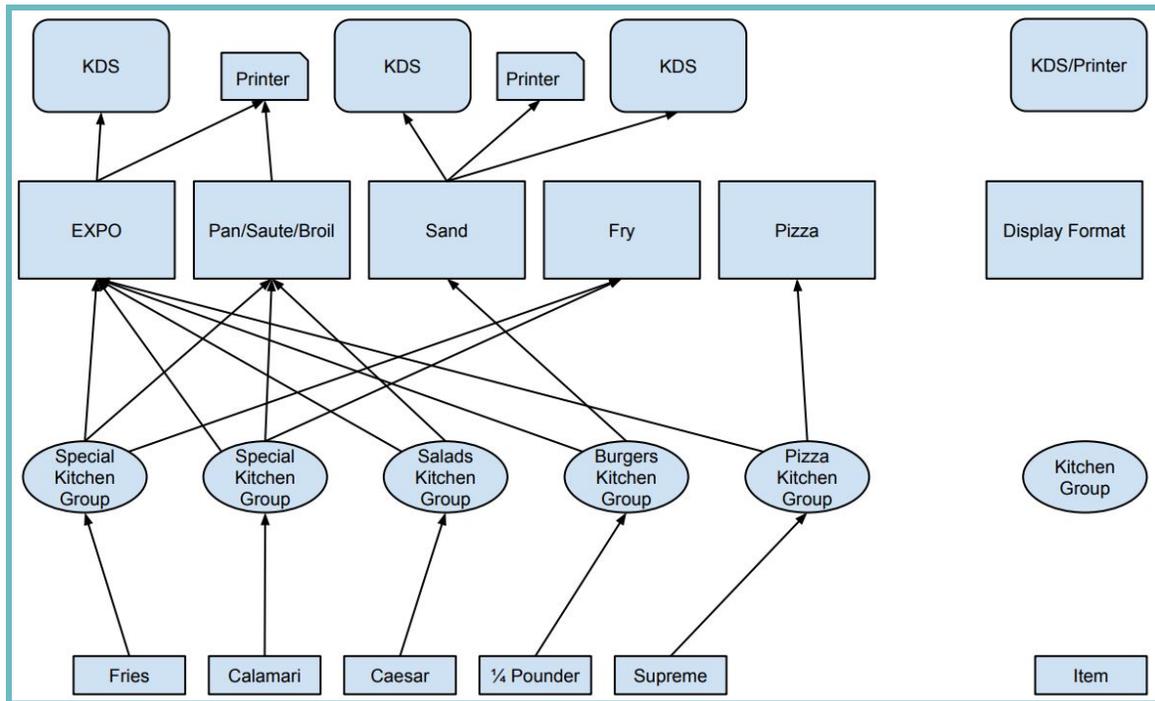
- Please refer to this [article](#) for details on Printing methods. Below is a summary of each.
- **Dedicated Socket Server:** This is the most recommended method. This allows an iPad to skip over the LAN discovery step to select a server for each job. This makes it more reliable(much less likely for duplicates). However, this setup lacks redundancy in that the iPad assigned as the Dedicated Socket Server must be running and connected or all socket traffic will fail.
- **Dynamic Socket Server:** This is the next most recommended method. It has redundancy of automatically failing over to another print server if one is offline. However, you lose the guarantee that only one iPad will ever try to send a print job meaning the introduction of duplicate prints.
- **Unshared Kitchen Prints:** This is **not** recommended for most setups. This method is only intended for very specific setups. For instance, a sandwich shop with one iPad and one printer that serves as both the receipt printer and the kitchen printer. Outside of this scenario, it can introduce Printing collisions.
- **Shared Printing without Sockets:** This is **not** recommended for regular use in **any** live setup. It opens the possibility of Print Collisions and printer lockups. If a printer locks up the only way to troubleshoot it is to restart the printer. If a Print Collision occurs the two print jobs that collide will **never** be sent or queued to be sent to the respective printer. Only use this setting temporarily if your configured socket server is down and may be for an extended period of time(despite troubleshooting attempts).
- For information on how to configure each of these options please refer to this [Question\Answer](#).

How do I set up a printer from beginning to end? How does all of the configuration options line up to the printer?

- Note: below there will be links to articles that correlate to the words they are embedded on for extra detail.
- **Setting up where and how Items print**
 - Starting from the bottom up you will want to create the [Items](#) → assign them to [Kitchen Groups](#) → assign the Kitchen Groups to [Display Formats](#).
 - **Items:** At this level you can configure an **alternate kitchen name** in the **Short Name** section. Please note **Short names\alternate kitchen names** can also be configured on **Sizes, Context Items, Modifiers, and Ingredients**.
 - **Kitchen Groups:** These are used simply to group the items for other printing settings. Make sure all items have a kitchen group assigned to them. Please note only **one** Kitchen group can be assigned to an item.
 - **Display Formats:** This is where the bulk of how things look when they print are configured(font, margins, color, sorting, what is shown/hidden, general format). Multiple **Kitchen groups** can be assigned to one **Display Format**. One **Kitchen Group** can be listed under more than one **Display Format**. These will later be configured to **Printer Templates** configured in the **POS App**.
 - Please note that under **Job Types** you can configure **Ignored Display Formats** for that particular **Job**.
 - This will stop the defaulted display formats defined in this setting from printing when sent from a particular user with this Job

- A good example of this is blocking the bar drink format for a bartender. When a bartender inputs a drink and sends the order, it is not likely they will need/want to print. However, when a server sends drinks you want them to go to the bar still and therefore do not configure an ignored format on that Job Type.
- **Setting up Printing Method, Physical Printers, and Printer Templates**
 - From the bottom up you will first select a [Printing Method](#) → Set Up [Printers](#) → Configure [Printer Templates](#) and the **Default Register Printer**
 - **Determining Printing Method:** There are a few different ways to structure how printing works at a location and also some best practices to follow. If you have not yet reviewed these methods please refer to this [Question/Answer](#) before proceeding. Below only describes how to setup these options **not** the pros and cons of each or if it is the best method for your site.
 - **Dedicated Socket Server:**
 - Ensure under **Location Setup** → Settings that **Allow Unshared Kitchen Prints** and **Allow Shared Printing Without Sockets** are both **unchecked**.
 - Under **Location Setup** → **Authorized Tablets** you will need to assign one of the iPads as the **Dedicated Socket Server**. Make sure the **iPad** chosen has a consistent **reliable connection** and a **Static or DHCP reserved IP address**.
 - **Dynamic(Priority-Based) Socket Server:**
 - Ensure under **Location Setup** → Settings that **Allow Unshared Kitchen Prints** and **Allow Shared Printing Without Sockets** are both **unchecked**.
 - With this configuration there will be an option on each iPad in the **POS App** under **User Menu** → **Manager** → **General** for a **Socket Server Priority** to be configured from **0-9**. Any device set to **0** will **always** be a **client** and never be a Socket Server.
 - **9** is the **highest priority**. This would need to be configured to the **main socket server**.
 - You can configure a **backup server** (or two) by assigning another **device** to the **next lowest priority** (one assigned to 8, one assigned to 7, etc).
 - If you are using a single iPad at a location with this method in use you must make sure it is set to a priority of 9 so it can be identified as the main socket server(although a different method may be more suitable).
 - **Unshared Kitchen Prints:**
 - To allow this make sure that **Allow Unshared Kitchen Prints** under **Location Setup** → **Settings** is **checked** in the **Admin Portal**.
 - You will **not** want to **set any printers to be shared** for this configuration.
 - **Shared Printing without Sockets:**
 - To enable this make sure that **Allow Shared Printing Without Sockets** is **checked** under **Location Setup** → **Settings** in the **Admin Portal**.
 - Only use this setting temporarily if your configured socket server is down and may be for a long time.
 - **Setting up Printers:** Heartland Restaurant supports the use of IP printers for receipt or kitchen printers. Please see this [document](#) for what printer brands and models are supported. Once printers are set up on the network, you will need to configure them in the Admin Portal. You will be able to test printers later when you are configuring templates.
 - **In the Admin portal under Location Setup** → **Printers:**
 - **Name** the **printer** what you want it to be called and referred to.
 - Enter the **Static or DHCP reserved IP Address** of the **printer**.
 - Select if the **printer** is **shared** or not.

- As a rule of thumb any printer that will receive print jobs from multiple tablets will need to be selected as shared. If the printer has a 1:1 ratio with the tablet (such as a receipt at the main station printer assigned to a single tablet) then you can leave it unchecked.
- Any printer selected as shared will be managed by the configured Socket Server.
 - Select whether the **printer** will support **two cash drawers** or use a **buzzer**.
 - Select the **Brand** and **Series** of the **Printer**.
- **Configuring [Printer Templates](#)**: **Printer templates** are used to link **printers** to what exactly will print on them through **Display Formats**. Most setups will only need a single printer template but, multiple templates may be configured and used. For instance, if you need to restrict certain printers to receive orders from certain rooms you may need multiple templates.
 - In the Heartland Restaurant App go to **User Menu** → **Manager** → **Printers**.
 - To create a template select **New Template**. It will take you to the Template configuration screen.
 - From here you can **name** the **Template**. If you do not select a name on saving it will name it Template 0, Template 1, etc.
 - You can **enable** and **disable** certain **rooms** for the **template**.
 - Any **printers** that you want **to be used** when the template is active you will want to select **enable** next to them. Any printer **not enabled** will **not be printed to** for the Template.
 - After enabling the printers you can select **Display Formats**.
 - **Default Formats**: By default these selected formats will print to this printer.
 - **Backup formats**: If a printer that has these selected formats set as their default formats, they will failover to this printer as the backup for the formats selected.
 - You can select **Send Test** next to any **printer** to **test functionality**.
 - Once done select **Save** at the top right. Your new template will show in a list at the top. Tap **Use** to enable to make that a template actively being used.
- **Configure the [Default Register Printer](#)**: This is the **printer** that will print off **guest checks, transaction receipts, reports**, etc for this **tablet**. Other names for this could be the 'Receipt at Main Station', 'Main printer', etc. Once you have enabled **Printer Templates** any **non-impact**, enabled printer will show as an option to be assigned as this printer.
 - Simply select the desired printer. You can **only have one Default Register Printer** selected **per tablet**. However **multiple iPads** can **share** the **same register printer** if needed (make sure the printer is configured as Shared in the Admin portal if multiple iPads will be assigned to it).
- For an overall reference of how the parts of printing meld together see this [diagram](#). It is also pasted below.



Is it recommended to have a hard-wired network connection to the tablet that will serve as the Dedicated Socket server instead of Wi-Fi?

- In general, a Hard-Wired connection typically provides a more reliable connection than Wi-Fi and is therefore recommended where possible.
- The Dedicated Socket Server will be handling the most traffic for the restaurant so it is pertinent it has the most reliable internet and LAN connection.

Are alternate names for the kitchen supported? If so, are other languages with special characters supported for this?

- Yes, menu objects with a **Short Name** field support this. When entered it will reflect on **Kitchen printouts** and on **KDS systems**.
- **Items, Ingredients, Context Items, and Sizes** can have alternate kitchen print names.
- **Alternate languages with special characters** can be entered and do display on **Kitchen Displays** and in the **POS App**. You would need to copy and paste from **Google Translate** or the like into the **'Short Name'** field. Here is an example after doing this:



A screenshot of a form with two input fields. The first field is labeled 'Name (required)' and contains the text 'Biscuit'. The second field is labeled 'Short Name' and contains the Chinese characters '饼干'. The form has a light blue border.

- **Important Note:** Some printers may not support or display special characters. It is best to test and verify that it will work where this is needed.

If the item rollup setting is on and you order two of the same items with different modifiers how does it print or display on the KDS?

- If the **Rollup Duplicate Items** option is **checked** in the **Display Format** only items that are **exactly** identical would roll up. If there were different modifiers on each item those items would show on a different line.

When setting up a printing logo in Heartland Restaurant, is there any additional configuration that needs to be done on the printer itself for the logo to print?

- You will want to ensure it is **monochromatic**(black and white) and follows suggested dimensions and format for logos(300x300, 72 dpi resolution, JPEG format) for the best result.
- You can configure it by navigating to **Location Setup** → **Customer Receipt**. Then Select the **logo box** and upload or select the desired image.

What printers are the preferred printers to use with Heartland Restaurant?

- Epson printers are currently the most commonly used brand of printers. Please see this [document](#) for currently supported printer options.

Peripherals

Is there a scale integration available? Which printer supports the scale?

- Yes, The supported scale is a **CAS PD-II**.
- It connects to the **receipt printer**. The Epson **TM 88-V-i** and **88-VI-i**are supported for this.
- For more information on how to set this up see this [article](#).

Is there a Barcode\SKU Scanner integration available?

- Yes, the supported scanner is a **Bluetooth CR 5000**.
- Please note that you can scan retail items in Heartland Restaurant but it is intended for limited retail functionality only.
- For more information on how to set this up see this [article](#).

What are the limitations on barcode scanning in Heartland Restaurant? For example, is there a cap on the number of items that can be scanned? Is it possible to import a file with retail items with barcode scanning available?

- Heartland Restaurant is intended for restaurant use and not a full retail setting.
- Limitations include:
 - It cannot handle variable weighted items where the barcode changes every time based on weight.
 - For example, deli's/supermarkets that use variable weighted items, the barcode that prints up has the item information as well as the price. So the POS system reads the 1st portion of the barcode and it sees that it is 'Boars Head Oven Gold Turkey', then the 2nd part of the barcode reads that it is \$8.49.
 - This scenario will not work in Heartland Restaurant because the next time the barcode might read \$5.28 and the barcode changes.
 - The barcode scanner must be connected via **Bluetooth**.
 - You will need to enter SKUs on items **one at a time**.

Offered Integrations(3rd Party or Heartland POS)

What 3rd party integrations are currently available with Heartland Restaurant?

- For information on currently offered 3rd party providers, please see our POS Integration Matrix [here](#).

Can a customer have API access to develop their own reporting tool?

- API is only being released for **existing** 3rd Party Integrations.

Are there currently any 3rd party inventory tracking integrations with Heartland Restaurant?

- For information on currently offered 3rd party providers, please see our POS Integration Matrix [here](#).
- In Heartland Restaurant there is functionality to set the stock limit for items. Please see the [Question/Answer](#) for details on how to use this feature.

How do I retrieve an API key for locations wanting to use a current 3rd Party Integration?

- Please contact the 3rd party integrator for setup steps. If they advise they need an API key for Heartland Restaurant, send an email to Hrpossupport@heartland.us with the integration you are needing it for.

Are there any Property Management Systems integrations available with Heartland Restaurant?

- Yes; for information on currently offered 3rd party providers, please see our POS Integration Matrix [here](#).

Is a Quickbooks integration offered for Heartland Restaurant? If so, is it for the full or web version?

- Yes, the integration encompasses both of those options.

Does Heartland Restaurant work with any 3rd Party Kitchen Display Systems(KDS)?

- Currently there are no 3rd party providers for this. However, Heartland Restaurant has its own integrated KDS system.
- For more information on how to set up a KDS see this [article](#).

Hardware

What Hardware is supported and certified for Heartland Restaurant?

- Please refer to our Certified Hardware List [here](#).

Is there an option for an enclosure for the Customer Display?

- There are a few different options out there. We recommend the Heckler Design Meeting Room Console.
- These are available in two sizes as denoted below.

H487	Heckler Design Meeting Room Console for iPad 9.7
H488	Heckler Design Meeting Room Console for iPad Mini

For demoing purposes should I use an iPad Mini or a bigger iPad?

- A 9.7 inch iPad is recommended for this purpose.

Can we buy equipment through distribution if we want to buy one time vs PaaS so customers can buy it either way?

- Yes, PaaS is not required for equipment.
- If you wish to purchase equipment for Demos specifically, we recommend going through BlueStar.

Is Control Scan required for Heartland Restaurant implementations?

- No, it is not required.
- However, it is supported for Heartland Restaurant. It has a new lower price and hardware options available.

Is there currently an ETA on when hardware will be available in the PaaS catalog?

- The PaaS catalog is built and has been released for Heartland Restaurant. See it [here](#).

Will 12 inch ipad pros be available for Heartland Restaurant?

- Yes, they are slated to be available at a later date and are not currently available.

Documentation\Resources

Will documentation be provided to us for available options and general functionality in Heartland Restaurant?

- There has been updated documentation added to the Heartland Knowledge Portal for Heartland Restaurant found [here](#).
 - There are ongoing efforts to expand and improve the documentation in the Heartland Knowledge Portal.
- There is currently a knowledge base openly available on the product [here](#). Some material may be outdated.

What is the email address to connect with sales/feature questions?

- HRPOSSupport@heartland.us

Is there a support team available for Heartland Restaurant?

- Yes, see below:
 - **24/7 Support Phone:** 1-833-844-HPOS(4767)
 - **Email:** HRPOSSupport@heartland.us

Business\Sales Questions

When will Heartland Restaurant be released for dealers to sell?

- It will be released to dealers as they complete all required training on the product.

What languages & currency does Heartland Restaurant currently support?

- The only language currently supported is English and the only currency currently supported is USD.

Is there a timeline for when Spanish support and other languages will be available?

- Not at this time.

Is Salesforce already set up with SaaS and PaaS options for Heartland Restaurant?

- Yes, once a dealer completes our training, the options in salesforce will be made available.

Who do dealers contact to request sample/seed databases?

- There are Gold Standard databases currently available for multiple restaurant concepts (see this [Question\Answer](#) for details). If you have a suggestion or request for a specific database, please contact HRPOSSupport@heartland.us.
- Dealers also have permission to create their own databases on their reseller account.

Are there marketing materials available for customers or End Users?

- Yes, please see available marketing materials for Heartland Restaurant [here](#).

How is the product being demoed in the training sessions? What application is used?

- On the training sessions the Zoom meeting app is used on the iPad and is also connected to the PC. Then the screen is shared for either device to display desired content.

Does the KDS count as a terminal license?

- No, a KDS will not count as an additional terminal license.

Where can I find up-to-date pricing information for Heartland Restaurant?

- This is found in **Salesforce** under **Content**.

Can dealers charge merchants at cost for equipment and software?

- No, dealers can charge the minimum MSRP value.

Are things like Skip The Line, Scan to Pay, and Loyalty included in the monthly charge for Heartland Restaurant as well?

- Yes, they are included in the monthly cost for Heartland Restaurant currently. Please see Pricing information in **Salesforce** under **Content** for the most up to date pricing information.

Will the Pass-Through option in Salesforce remain available to dealers selling Heartland Restaurant for additional monthly revenue?

- Yes, this will remain available to dealers.

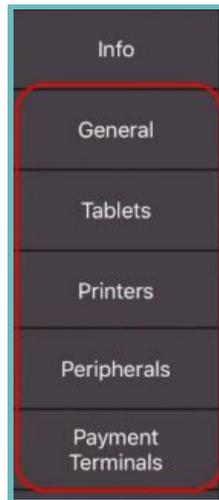
As an existing MobileBytes dealer, will I have 2 logins for my existing customer and my new Heartland Restaurant customers?

- It will be the same login but, their will be a different website you will log into going forward.
 - Instead of <https://admin.mobilebytes.com> you would go to <https://hrpos.heartland.us>.
- Once you have moved the merchant over to Heartland Restaurant(billing through Salesforce), they will be marked as a Heartland Restaurant customer in the Admin Portal.
- Once this happens, you will be able to follow these steps to move them over to the new application on each iPad.
 1. Install **Heartland Restaurant** from the **App Store**.
 2. Launch **MobileBytes POS**.
 3. Make sure the iPad is **synced with no pending updates remaining**.

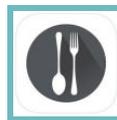


4. Document iPad specific settings under **User Menu** → **Manager**
5. Notate/Screenshot the settings listed here so you can mimic the setup in Heartland Restaurant.

- a. All settings under **General**
- b. **Ticket Prefix** under **Tablets**
- c. All settings under **Printers**
- d. All settings under **Peripherals**
- e. All settings under **Payment Terminals**



6. Launch **Heartland Restaurant**.



7. **Match** the previous **iPad settings** that were documented earlier.
8. Verify **Heartland Restaurant** behavior
 - Test printing each kitchen receipt
 - Test all Peripherals
 - Test printing Guest Receipt
 - Test PAX communication if applicable
9. Uninstall **MobileBytes POS**.

When does the hand off take place for the shared support?

- A few things need to happen before an existing MB merchant can be moved to shared support.
 - The merchant would need to be moved over to Heartland Restaurant by installing the Heartland Restaurant App.
 - The dealer would need to move billing for this site over to our system(salesforce).
 - Once the merchant is converted over and the above items are handled. they can become a shared support merchant.

Is Shared Support Mandatory for Heartland Restaurant?

- No, it is not mandatory.

What does a shared support plan with Heartland Restaurant cover? What times is it available?

- The team that handles Shared Support is available 365 days a year 24/7. It is English only.
- It is Non-discountable, no onsite support, and non-refundable.

If we have deals closing using the current MobileBytes model will these accounts qualify towards our first quarter quota for Heartland Restaurant?

- The only accounts that count towards this quota will be through the Heartland Restaurant system not the Mobilebytes system.