

Heartland

Restaurant

Mini Manager Guide

Rev. 5/2019

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Overview

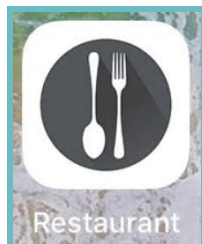
This guide is a smaller more to the point version of the manager guide found [here](#). It is intended to be easier to reference to more quickly with less details. A slightly higher level of understanding of the system may be needed for this guide.

Getting Started with Heartland Restaurant

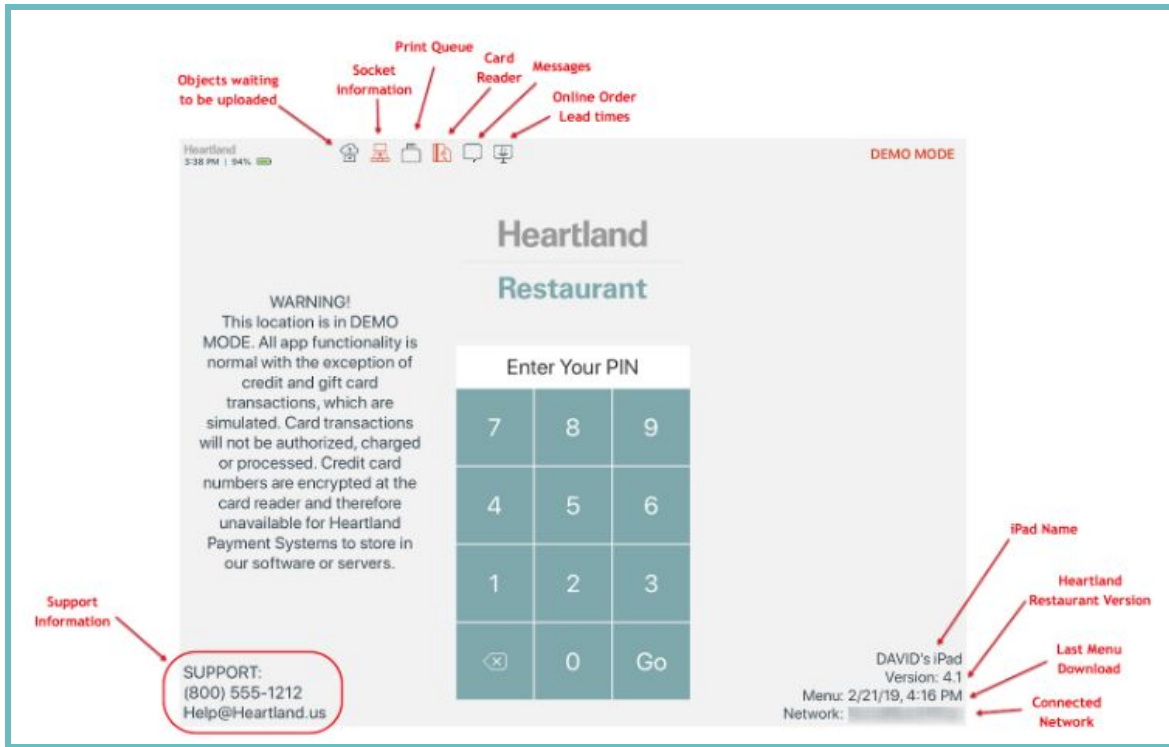
This section details what you would typically do when using Heartland Restaurant for the first time.

Opening Heartland Restaurant

Once you are logged into your iPad locate the **Heartland Restaurant** application and tap to open it.



Login Screen



Clock In

While on the **Login** Screen, type in a Staff Member's **PIN** and then tap **Go**.

You will then reach the **Clock In** screen. On the right hand side, you will see a square with the front camera activated (if the camera is enabled). Once you click on **Clock-In** you will be prompted for a job type if applicable. Then the system will capture an image at the time of the button press.

Default Register Printer Assignment

*In order to have a cash drawer attached and print off guest checks, each iPad will need a **Default Register Printer** configured.*

- Tap the **User menu** at the top right of the application.
- Tap **Manager**.
- Tap **Printers**.
- Select your Printer template by clicking **Use** (if it is selected it will show in a light blue color).
 - If no templates are showing, tap **New Template**.
 - Select the **Rooms** that this receipt printer will print for.
 - Select the Printer for this iPad and **Enable** it.
 - Enter a **Name** for the **Template** and **Save**.
- Select desired printer under **Default Register Printer**.

Select Payment Devices

Depending on your setup, you will have an EMV Terminals and/or MSRs attached to each of your iPads. You will want to select the appropriate devices to connect to each iPad.

EMV Terminals

Assuming that your dealer already configured your devices on the back end and connected them to the network, you may need to do these additional steps:

- Tap the **User menu** in the top right of the application and select **Manager > Payment Terminals**.
- You will be brought to a screen of available **Payment Terminals**. Tap on one to select it.
- Once selected it will attempt to connect to the PAX device. If it is successful it will show it is connected when you tap on the **Card Reader** icon.

Start of Day

Clocking In

Each Staff member needs to:

- Enter their **PIN** number or swipe their card on the **Login Screen** and select **Go**.
- The Staff member would need to face the Camera and then select **Clock In**.
 - If they have multiple jobs assigned they will need to select one to continue.

Preparing to Take Cash Transactions

Cash Drawer

To Attach a Drawer:

- Select the **User menu** on the top right.
- Select **Attach Drawer**.
- You will then see the **Confirm Starting Cash** keypad.
- You may have a preconfigured amount set in your system or you may need to enter the starting amount each time. Use the keypad to change the **Starting Cash**.
- Select **Confirm** when done.

Server Bank

Staff members using a Server Bank do not need to take additional steps in Heartland Restaurant at the Start of Day.

No Sale

To do a **No Sale** simply select the **User Menu** on the top right and select **No Sale**.

Adjusting Item Stock\Counts

The Stock of an item can be managed in two ways:

- **Long Press**
 - When in the order screen you can long press any item to manually modify the stock number.

- **Item Stock Management Screen**

- Select the **User Menu** in the top right and then select **Manager** → **Item Stock Management**.

To **86** an item or show that an item is **out**, you would set the item **stock value** to **0**. This shows in red on the order interface.

Daily Operations

Going on Breaks

Starting a break

- Select the User Menu in the top right and select **Clock Out**.
- Select **Start Break**.
- If multiple break types are available select the appropriate type to start the break.

Coming back from a break

- Log into the system from the PIN in screen.
- The **Clock Out** screen will display again. Select **End Break**.

Editing/Changing Time Punches

Select the **User Menu** in the top right and select **Manager** → **Time Punch Management**.

Filtering

- **Date Range:** In the bottom middle you can select a span of dates to view time punches from (Start Date on left | Stop Date on Right). Tap on a Date to change it.
- **Staff Filter:** You can tap the Staff button and select a Staff Member to filter by.
- **Job Filter:** You can tap the Job Type button to select a Job to filter by.

Editing a Time Punch

- Select Edit next to the desired Time Punch.
- You can change the Staff member who was assigned to the shift, the clock in, and clock out times by tapping on the desired field.
- When done select the **Save** button to the right.

Deleting a Time Punch

- Place your finger on the desired Time punch and **swipe left**.
- You will see a **Delete** button display to the right. Select it.
- A confirmation message will appear. Press **Delete** to confirm the deletion.

Creating Tickets

There are multiple ways to create a ticket in Heartland Restaurant. What is available is dependent on your configuration. Some additional steps may be required after initial ticket creation depending on your specific setup.

Table Layout Room

This room will have a layout with multiple tables showing to represent the tables in the restaurant.

You can create a ticket by **tapping on** the desired **table**.

Tab Room & Delivery Room

These rooms are typically used for Kiosks, Skip the Line, Online Ordering, or Delivery Orders. Orders are sent automatically to these rooms if these options are configured for it.

The only difference is the Delivery room will show a map view and driver option.

You can manually create a new ticket by selecting the **New Ticket** button in these Rooms.

Ordering Items

Adding Items

- Tap on an **item** to add it to the ticket.
- Depending on the configuration of the **item**, you may have an additional window open to customize the item with modifiers, a weight, etc. Once done customizing the item tap in a blank area on the screen to go back to the order screen.

Managing Items

Once items have been added to a check you can do various actions with them.

You can tap on a single item in the **Ticket Preview** to select it.

If you long press on an item in the **Ticket Preview** you can select multiple items at once by tapping on additional items.

You will see a small menu in the bottom right appear with various options to manage the selected items

- **Select All**
- **Seat**
- **Course**
- **Move**
- **Duplicate**
- **Quantity**
- **Void Item/Remove Item**
- **Modify**

Split Checks & Tickets

To do a split:

- Select the desired ticket. Once in the **Order** screen select **Split** from the **Left-Handed** menu.
- Select the desired option from the list
 - **New:** This option creates a new empty check within the ticket. Below is the result.
 - **By Seat:** This option will split the check based on seats
 - **2x-9x:** This option will split the items evenly across the amount of checks you choose from 2-9. The items will be fractionally split across all checks.
 - **Remove All:** Selecting this will remove any Splits and all items will be parented to the ticket as it was originally.






Viewing and Navigating Split Tickets

Splits in Heartland Restaurant will keep everything under the same ticket but will show multiple checks that you can view separately.

- You can select to view **all** checks or just a particular check at the top of the Ticket Preview once split.
- Each Check has its own unique number within the ticket(Ex. Ticket **#X5** split into checks **#X5-1** and **#X5-2**.
- After splitting you can name the checks differently by tapping where you see 'Check #' at the top of the ticket preview.

Ticket Info

The Ticket Info screen shows pertinent information for the ticket you are viewing and houses some of the actions you can perform on a ticket. Some Rooms may bring this screen up automatically when creating a ticket. An overview of these options are shown below.

Ticket #X9		
    		
Phone	Guest #	
Company	Guest Name	
Email	Credit Card Name	
Address		Suite
City	State	Zip
Delivery Instructions		
Alternate ID or Card Number		
Room/Owner		
Server	Lea Meredith	
Room/Table	Dining Room / 4	
Guest Count	1	
Ticket Status		
Hold Ticket		
Promise Time		
Ticket Status	Open	
Paid Status	Unpaid	
Created By	Lea Meredith	
Ordered	Apr 2, 2019 at 12:47 PM	
Closed		
Ticket Actions		
Retrieve Card Info		
Combine Ticket		

Ticket Name

Guests in Range | Credit Card Tab | Order History | Geocode | Caller ID

Guest Information

Change Ticket Owner | Current Ticket Owner

Change Room/Table | Current Room/Table

Change Guest Count | Current Guest Count

Change Hold Time | Current Hold Time

Change Promise Time | Current Promise Time

Ticket Information

Transfer Payment to Ticket

Combine a Ticket into the Ticket you are Viewing

Handling Payments/Transactions

Paying for a Ticket

To pay for tickets in Heartland Restaurant simply select the desired ticket. In the **Left-Handed** menu select **Checkout**. This will take you to a menu of options to pay out a ticket.

Cash

If the customer gives you the **exact amount**, simply press the **Cash** button; also, you can enter a specific amount using the **keypad** and selecting **Cash**.

From here you can **Print** a receipt, **Void** the payment you just made, or tap in a blank space on the screen to return to the ticket preview screen.

Credit

To take a **Credit** payment for the **full amount** simply swipe the card while in the **Checkout** screen. (You may have to press the **Card** button if you are using an **EMV device**).

- To take a **partial payment** you would first use the **keypad** to enter the **desired amount** and then swipe the card (You may have to press the **Card** button if you are using an **EMV device**).

To manually enter a card number select **Card** and enter the information into the appropriate fields that appear (You may need to **Long Press** the **Card** button if you are using an **EMV Device**).

If the transaction was successful, it will show an **approval** message.

You will be brought to a screen with additional options

Closing a Ticket

To close a ticket manually, navigate to the desired ticket then select **Close** in the **Left-Handed Menu**.

Making Adjustments to a Transaction

Same Day

To make adjustments to any transaction on the **same day** it was ran, simply navigate to the **desired ticket**. At the bottom of the **Ticket Preview** you will see the **payment(s)** taken for the ticket. **Tap on** the desired **payment** to **change**, **print**, or **void** it.

Different Day

You **cannot** make adjustments to transactions from **previous days**; but you can **view**, **print**, and/or potentially **refund** them.

To do so:

- Select the **User Menu** in the top right. Select **Manager** → **Reports**.
- Select the **Transactions** report.
- Tap the **date** in the top left and select the desired date or range of dates then select **Run**.
- You can also narrow it down further using the **Filter** options.
- Tap the **Ticket #** of the desired transaction.
- This will open up a detailed view of the ticket. Select **View Original** in the top right.
- This will bring you to the **Ticket Preview** screen for that ticket. Select the desired **transaction** on the **Ticket Preview**.
- From here you can see the details of the transaction and **Print out/Preview** the transaction receipt.
- To refund a ticket you can go to the **Ticket Info** screen and select **Refund Ticket**.

Applying Adjustments/Discounts

Heartland Restaurant defines a **Discount** as being applied to **Items** and an **Adjustment** as being applied to entire **Tickets**.

You can apply **Discounts** by selecting an item(s) in the Order Screen and then selecting **Discount** in the bottom right. Tap on the desired discount to apply it.

You can apply **Adjustments** at **Checkout**. Select **Checkout** from the **Left Handed Menu** then select **Adjust**. A list of adjustments will appear. Tap on the desired adjustment to apply it.

Reprinting Tickets

Select **Reprint** from the **Left Handed Menu**. From here you can reprint/preview a **Customer Receipt** or reprint/preview a slip to the kitchen/display format.

Searching/Filtering Tickets

- 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 current **Staff 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.

End of Day

Tip Out

A tip out set as **Automatic** will automatically be allocated to a **tip pool** and will be available for redistribution on the POS. A tip out set as **Suggested** will need to be manually sent to a **pool** for redistribution or tipped out directly to an individual on the POS.

Tipping out to an Individual Staff Member or Pool

- Select the **User Menu** at the top right.
- Select the **Tip Out** option from the drop down menu.
- In the **Tip Out to** section select **Staff** and choose the staff member you are tipping out or select **Pool** and choose the pool you are tipping out to.
 - (Optional) Select the **Filter Job Type** option and choose the appropriate job type.
- Select the **Amount** option and type in the dollar amount.
- Optionally you can add a **Comment**.
- Select the **Tip Out** button to complete the tip out.

Tipping from a pool to individual staff

This is the only step you need to do when Automatic Tip Outs are configured.

- Select the **User Menu** at the top right.
- Select the **Tip Out** option from the drop down menu.
- In the **Tip Out from** section select **My Tips** and change to the desired tip pool.
- Select the **Filter Job Type** option and choose a job type.
- Select the **Staff** option and choose an individual staff member.
- The **Amount** will **auto generate** based on hours worked.

- You can edit this amount by clicking on the **Amount** option and changing the dollar amount.
- Select the **Tip Out** button to complete the tip out.

Checkouts

Server Bank Checkout

All tickets must be **closed** under the particular server in order to perform a Checkout.

To complete a Server Bank Checkout the Server will need to select the **User Menu** in the top right of the screen and select **Server Bank**. A screen will display with the option to **Checkout** and pertinent information to the current Server Bank.

Once all tickets are closed the server can select **Checkout** at the bottom. It will bring up a second message verifying they want to checkout. If they press **OK** then it completes the **Checkout**. Once the checkout is completed the system assumes that amount listed as **Server Owes Merchant** is returned to the restaurant or vice versa if the server is owed money.

Once a checkout is done each individual checkout can be viewed under **User Menu** → **Manager** → **Daily Review** → **Cash**.

- From this screen if you select a **Server Bank** that is not checked out as a manager with appropriate permissions you will have the option to **Force Server Checkout**. Please note this still **does not** override if they still have open tickets or pending transactions.
- If you select a **Server Bank** that is checked out you can **Print** a summary report for that checkout.
- If you want to see information on a Server Bank from a previous date you can select **User Menu** → **Reports** → **Cash Drawers** in the Merchant App or Admin Portal. If you select one of the Server Banks it will bring you to a detail page.

Server Balancing

If your system is set up to require balancing, when a Staff member goes to checkout, they will see a list of Servers with currently opened Server Banks is visible under the **Balance Server** section.

From here you can select **Checkout & Balance**.

A prompt will appear to **Collect** or **Give** money to the Server to balance them.

Once you press **OK** the **Server Balance** will reflect in the checkout screen and reflect in the **Expected Cash** totals.

The Server that was balanced will not need to complete their own checkout as it completes it at the same time they balance with the other staff members.

If a server checks out without balancing, their record on the **Daily Review** screen shows in yellow.

On the **Daily Review** screen, you can see the balance on the drawer reports, the Server Bank Checkout report, and Cash Drawer Checkout report.

On the **Cash Drawers** report, you can see a Server Balances section as well as a summary total of Server Balances in the Cash Drawer Summary section.

Cash Drawer Checkout

The Cash Drawer Checkout is very similar to a Server Bank checkout. Differences are detailed below.

It will show **Expected Cash in Drawer** and also indicate where the drawer was attached that was used.

The same rules in a Server Checkout apply to a Cash Drawer Checkout:

- All tickets must be closed and transactions paid under that Staff Member before checkout is allowed.
- It also shows in the same place in reporting within the App. One entry is the specific person's checkout for a drawer and another entry is the drawer in its entirety. This is to accommodate multiple people working off of the same drawer.

Another difference is when you checkout with a Cash Drawer, that drawer will be detached. A new drawer will need to be attached before taking additional cash transactions on that iPad.

Actual Cash Counting

If this is enabled, it will prompt Staff Members checking out a Cash drawer to count the cash value of **any** drawer that is used in the location. The system will report any difference between the **System Expected Cash**(System-Counted) amount and the **User Committed Cash**(User-Counted) value.

If this option is checked all cash drawers **must** be counted in order to close the day properly.

When they select Checkout, they may count the drawer now by entering the amount and selecting **Save** or they can select **Count Later**. If they select **Count Later** only someone with access to the **Daily Review** screen can enter the user-counted drawer amount.

Any variances are shown on the **Daily Review** screen or the **Cash Drawers** report.

Multiple Staff on a Cash Drawer

The first Staff member will attach the drawer and enter the **Starting Cash**.

When another Staff member goes to **Attach Drawer** on the same cash drawer it prompts if they want to attach to the same drawer as another Staff member. From here they can select **Attach** to assign themselves to that drawer as well.

When Staff members checkout, they will see an **Other Cash Transactions** line which denotes other staff members transaction totals. The **Checkout Cash Transactions** are the transactions completed by the Staff Member checking out.

When anyone but the last Staff member left on a drawer checks out it asks that they detach from the drawer as it normally would.

If previous Staff members using the drawer checked out and had tips, it will indicate this on the following checkout reports in a **Tips Already Paid Out** line.

When the last Staff Member checks out it will present a **Last Staff on Drawer** prompt letting the member know that checking out will close the drawer.

Note: If **Actual Cash Counting** is enabled, the last Staff member will be the **only** member that will be prompted to count the drawer. For more information on **Actual Cash Counting** see this [section](#)(Page 13).

Once all Staff members assigned to a drawer are checked out it will show an entry for each Staff Member for that drawer as well as entry for the drawer in its entirety on the **Daily Review Screen**.

The **Cash Drawers** report will show the multiple users in the **Attach Log** section if you select the specific Drawer.

Daily Review

The depth in which this screen will be used depends on your restaurant's operational procedure. It can be accessed by selecting the **User Menu** at the top right and selecting **Manager** → **Daily Review**.

Typically at closing time, you will want to see a Green ✓ or no indicator for **Tips**, **Tickets**, and **Cash**(no indicator will show for some sections depending on setup described below).

A Red X will show if there are still things left to be done or that need attention.

Tips Screen

This screen will show any transactions that did not have a tip entered and allow you to enter a tip.

You can enter tips directly into this screen or you can tap on the **Ticket** name to navigate directly to the ticket.

To enter tips in this screen:

- Tap the **Tip** box and enter the desired tip amount using the keypad. Select **Next** on the keypad to go down to the next transaction in the list.
- You can mark all empty tips as \$0 by selecting the **Empty Tips** button and selecting **Mark empty tips as 0**.
- When done adjusting tips, tap **Submit Tips** at the bottom middle to save them.

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

Tickets Screen

This screen will display any tickets that have not been closed, the Staff Member they are under, and their status(aka Unpaid, open, etc).

Tap the desired **Ticket** to be brought directly to the **Ticket Preview** screen for it. From here a manager could take necessary steps to close the ticket or, advise the appropriate Staff Member to take needed actions to close it.



A green ✓ will display if all tickets are **Closed**. Otherwise a red X will display.


Cash Screen

This screen will show all the incomplete(Red) and complete(Green) checkouts/balances of Server Banks and Cash Drawers for the day.

If all checkouts are complete, a green ✓ will display. Otherwise a red X will display.

Basic Icons on this screen:

-  **Staff Member's Cash Drawer Report:** Shows the drawer report of an individual staff member. If Actual Cash Counting is used enabled, then the user counted amount can be adjusted here.
-  **Full Cash Drawer Report:** Shows the report of an entire drawer. If multiple staff use the same drawer, this will not show green until all Staff Members checkout.

-  **Server Bank**- Shows the Server Bank report for an individual staff member. If balancing is enabled and they checkout , but do not balance, this will show in yellow.

If you tap on one of the checkouts it will display a report. If they have already checked out it will have an option to **Print** at the very bottom. If they have not checked out, it will give the option to **Force Server Checkout** instead.

- If all tickets are closed, it will allow you to force the checkout. If any tickets are open you **cannot** force the checkout.

For information on the normal checkout processes for Server Banks and Balancing, see [here](#)(page 12).

For information on the normal checkout processes for Cash Drawers, see [here](#)(page 13).

Manager Menu

To access this menu select the **User Menu** in the top right and choose **Manager**.

Info

The **Info** screen allows you to view useful information on your systems current configuration. If you select the + icons where denoted, it will expand to information about each.