

Heartland

Restaurant

Online Ordering & Catering Setup

Rev. 05/2019

Table of Contents

Overview	4
Where do I configure Online Ordering & Catering?	4
General Tab	4
URL Subdomain	4
Website Settings	5
Setting a Logo and Banner	5
Selecting Colors	6
Show Email Opt In	7
Assigned iPad	7
Disable Special Instructions	7
Confirmation Email	7
Send Tickets Unassigned	8
Online Ordering Tab	9
General Settings	9
Future Days Allowed for Online Orders	9
Ticket Prefix	9
Disable Future Ordering	10
Allow Gift Purchases	10
eGift Room	10
Send ASAP Orders Without Hold Time	10
Carryout/Delivery Settings	10
Supported & Active	11
Room	11
Payment Types	11
Minimum	11
Maximum	11
Lead Time	12
Tips Allowed	12

Delivery Area	12
Delivery Zones and Automatic Delivery Fees	13
Carryout/Delivery Schedules	14
Menu & Hours	14
Override Menu & Hours	15
Catering Tab	15
What is my Catering URL?	15
Catering General Settings	15
Future Days Allowed for Catering Orders	16
Catering Cut Off Time	16
Ticket Prefix	16
Disable Future Ordering	16
Catering Carryout/Delivery Settings	16
Allow	17
Room	17
Payment Types	17
Minimum	17
Maximum	17
Delivery Area	17
Catering Schedules	17

Overview

This document will detail Online Ordering & Catering configuration for Heartland Restaurant.

Where do I configure Online Ordering & Catering?

The bulk of settings for Online Ordering & Catering, are configured on the [Admin Portal](#) under **Location Setup** → **Online Ordering** as shown here.



General Tab

This tab contains general settings such as how the system will interact with merchants and configuring the website for both Catering & Online Ordering.

URL Subdomain

You can customize the URL for your Online Ordering & Catering web page here. You can **only** customize the text in the white box. All Online Ordering & Catering web addresses for Heartland Restaurant end in '.hrpos.heartland.us'.



Website Settings

Setting a Logo and Banner

Heartland Restaurant by default has a pixel-style banner that you can utilize.

You can add your own banner. Simply select **Set Banner** then select an already uploaded image or select the plus icon  in the bottom left to upload a new one.

Recommendations for Uploaded Banners: JPEG Format, 72 dpi resolution, 2000x2000 dimensions

You can also add your **Logo** to the website. Simply select **Set Logo** then select an already uploaded image or select the plus icon  to upload a new one.

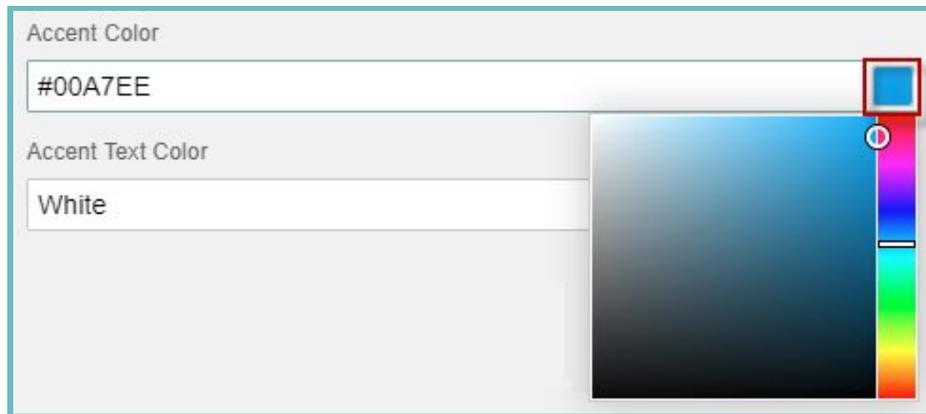
Recommendations for Uploaded Logos: JPEG Format, 72 dpi resolution, 300x300 dimensions

Selecting Colors

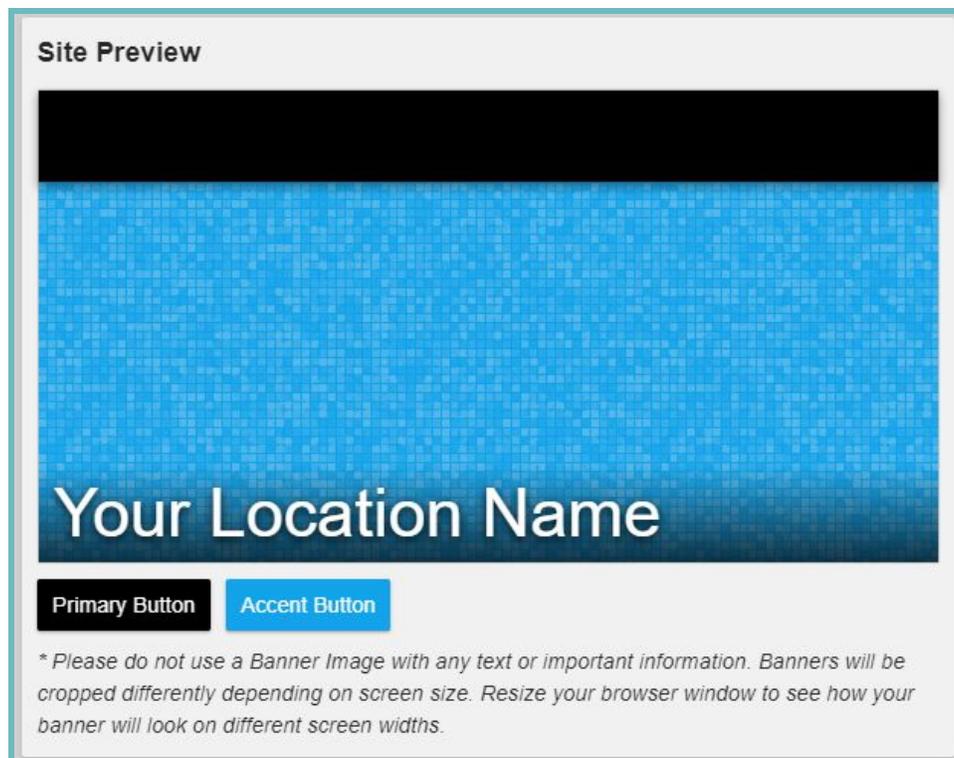
You can change the displayed colors for your website with the respective color settings.

Text colors only have the option of Black or White.

Background/Button colors have more options. You can enter a Color Hexadecimal number or select a color by clicking the color swatch to the right of the color.



You can see how changes you make reflect by scrolling down to the **Site Preview** section.



Show Email Opt In

If checked this will allow customers the option to have their email recorded to receive emails from your restaurant. Once enabled this is what it looks like to customers on your website. You can view if they opted in or not on the **Loyalty** report(under **Reports** → **Loyalty**):

The screenshot shows a form titled "Enter your info" with the following fields and options:

- Name ***: 42 char. left. Input: Customer
- Email ***: 27 char. left. Input: Customeremail@gmail.com
- Phone ***: Input: (123) 456-7890
- How will you be paying? ***: Radio buttons for "In person" and "New credit card".
- Send me promotional offers and updates from Lea Demo**: Radio buttons for "No" and "Yes" (selected).
- SUBMIT YOUR ORDER**: A large grey button at the bottom.

Assigned iPad

To use Online Ordering & Catering you **must** have an Assigned iPad selected. This iPad **must** be online for your restaurant to receive online orders. Select the desired iPad from the dropdown.

Disable Special Instructions

If checked, it will not allow customer's ordering on your website to enter special instructions for **any** items.

Confirmation Email

Any email listed here will receive copies of the confirmation emails sent to customers when they place an order. If multiple emails are being used, separate them with a semicolon(;) with **no spaces**.

The screenshot shows a field labeled "Confirmation Email" with a question mark icon. The input text is: firstemail@gmail.com;secondemail@gmail.com

Here is an example of a Confirmation Email

Customer information

Name: Testing Order
Email: [\[Redacted\]](#)
Phone: [\[Redacted\]](#)
Payment Type: Paid online

Pick Up Destination

[\[Redacted\]](#)
[\[Redacted\]](#)
Phone: [\[Redacted\]](#)

Pick Up Time

Please pick up your order at: 2:08 PM on 04/10

PLEASE DO NOT REPLY.

This is a system-generated message from an unmonitored mailbox.

For more information, please visit heartland.us.

Send Tickets Unassigned

If **checked** orders will be sent into the system unassigned. The ticket will then automatically be assigned to the Staff Member who **closes** the ticket.

If **unchecked** orders will be sent in and assigned to a generic **Online Order User** in Heartland Restaurant. If a ticket is assigned to the Online Order User it should be later transferred to another staff member before it is closed out so the sales/tip for the order can be received by the correct staff member.

Online Ordering Tab

This tab contains settings specific to how Online Ordering behaves with the system.

General Settings

General Setting contain specifics for configuring the ticket such as the Ticket Prefix, and Future Orders.

GENERAL **ONLINE ORDERING** CATERING

General Settings

Future Days Allowed for Online Orders

Ticket Prefix

? Disable Future Ordering

 Prevents users from choosing an order date/time. Will default to next available time.

Allow Gift Purchases

 Allows customers to place eGift orders online.

eGift Room

Send ASAP Orders Without Hold Time

 If customer places an order for ASAP and order has a lead time, kitchen will be prompted to begin order immediately.

Future Days Allowed for Online Orders

Here you can specify the number of days your location is allowing for an order to be placed ahead of time.

Ticket Prefix

The Ticket Prefix field lets you designate a prefix for all online order tickets in the app so they can be easily identified. The prefix can be between 1 and 4 characters. Examples of common prefixes are WEB and OLO.

Disable Future Ordering

This setting will ignore the “Future Days Allowed for Online Orders” and will only show the next available order time.

Allow Gift Purchases

Allow customers to place gift card purchases online.

eGift Room

This is a MobileBytes option only.

Send ASAP Orders Without Hold Time

If Customer places an order for ASAP and the order has a lead time, the kitchen will be prompted to bein the order immediately.

Carryout/Delivery Settings

Settings in each of these sections are identical but, just effect either Carryout or Delivery behavior. References to settings below will not contain ‘Delivery’ or ‘Carryout’ in front of them.

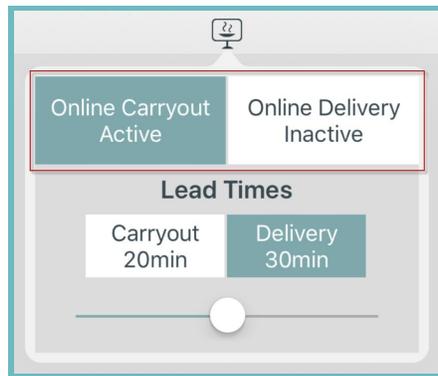
Carryout Settings	Delivery Settings
Carryout Supported <input checked="" type="checkbox"/> Shows carryout as an option for customers.	Delivery Supported <input checked="" type="checkbox"/> Shows delivery as an option for customers.
Carryout Active <input checked="" type="checkbox"/> Allows customers to place carryout orders.	Delivery Active <input checked="" type="checkbox"/> Allows customers to place delivery orders.
Carryout Room Kiosk Room	Delivery Room Kiosk Room
Carryout Payment Types Both	Delivery Payment Types Credit Card
Carryout Minimum 0.00	Delivery Minimum 0.00
Carryout Maximum 0.00	Delivery Maximum 0.00
Carryout Lead Time (in minutes) 0	Delivery Lead Time (in minutes) 0
<input type="checkbox"/> Carryout Tips Allowed Allows customers to add a tip to carryout orders before submitting.	<input type="checkbox"/> Delivery Tips Allowed Allows customers to add a tip to delivery orders before submitting.

Supported & Active

If **Supported** is checked it will set it as a potential service type. If your restaurant is no longer going to do Carryout **at all** you would uncheck this setting for carryout.

If **Active** is checked, the service type will be available for customers to order from at a particular time. For instance, if you need to disable Delivery Orders because your only delivery driver was unable to make it in for the day.

There is an option to toggle whether or not a Service Type is **active** via the Heartland Restaurant App as shown here.



Typically, only the **Active** option will be toggled.

Room

Select the Room that you want orders to go under for the service type.

Payment Types

You can set the form of payment you accept for online orders here:

In Person- only payment in person will be taken.

Credit- only payment by Credit card will be taken.

Both- In Person or Credit payments are acceptable.

Minimum

Set the Minimum order total for the service type. For instance if I set it to \$5 and a customer tries to place an order for \$3 it will not let them.

Maximum

Set the Maximum order total for the service type. For example, if I set it to \$50 and a customer tries to place an order for \$60 it will not let them.

Lead Time

Enter in the Lead time in minutes for the service type. This will be the estimated amount of time it will take to prepare the order. If a time is set for delivery, the time given to the customer will be the lead time + the drive time to get to their location.

This can be changed in the Heartland Restaurant App as well.

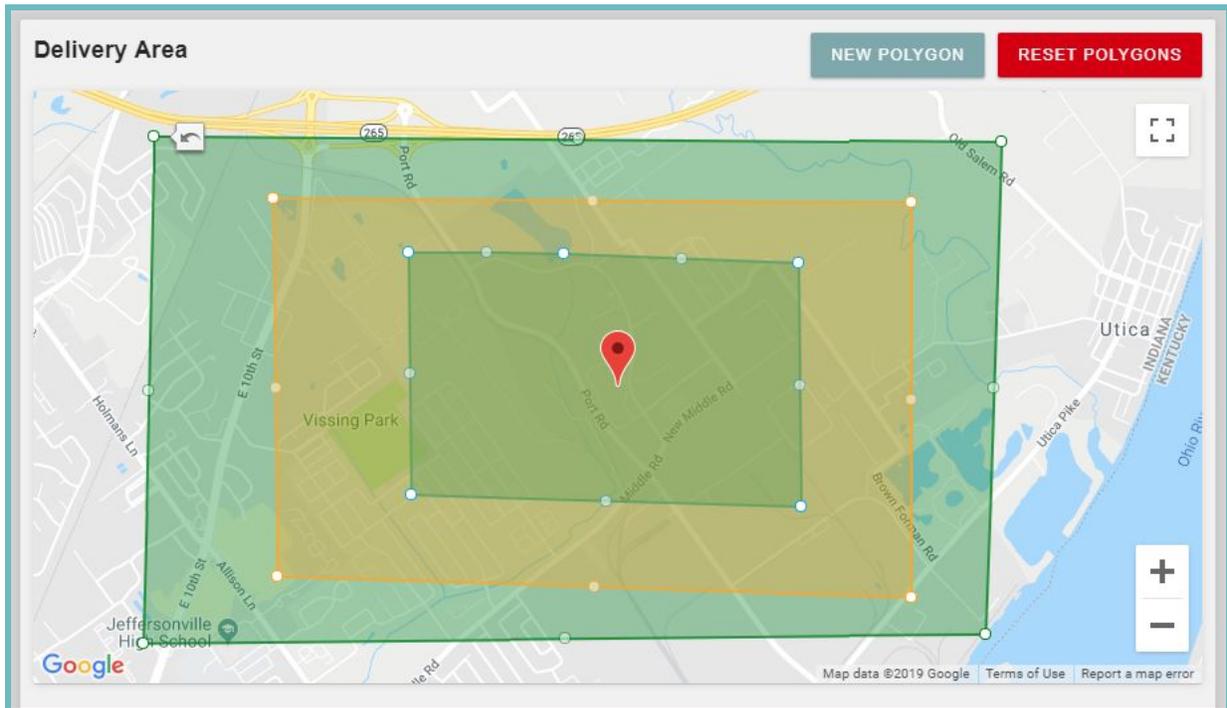


Tips Allowed

Checking this will allow customers to add a tip to their payment for the service type.

Note: The Room **must** have suggested tip amounts enabled or no tip amounts will show with this checked.

Delivery Area



This section shows a map of the area surrounding your location. You can configure your **delivery areas** using this map. If a customer is outside of the designated delivery area they will not be allowed to proceed with their order and advised to call the restaurant.

Delivery Zones and Automatic Delivery Fees

You can use the map to add additional polygons(delivery zones) by selecting **New Polygon**. You can have up to 5 zones configured.

As you move the polygon using the drag dots around it, new draggable dots will appear in the center to allow for very precise zone setup if desired.

If you wish to reset **all polygons** simply select the **Reset Polygons** button at the top right of the map.

Below the map you can select an **Adjustment** to associate as a delivery fee to that zone or **delete** the **polygon** associated with that zone.

Note: Adjustments are configured under **Account Menu** → **Adjustments**. Any adjustment configured will be displayed as an option for a delivery fee.



The screenshot shows a configuration panel with two sections. The first section is titled "Blue Zone Delivery Fee" and contains a dropdown menu with "None" selected, followed by a red button labeled "DELETE BLUE POLYGON". The second section is titled "Orange Zone Delivery Fee" and contains a dropdown menu with "Delivery fee" selected, followed by a red button labeled "DELETE ORANGE POLYGON".

Carryout/Delivery Schedules

This is an important piece of setting up Online Ordering. Under here you can configure your Carryout & Delivery availability hours.

Menu & Hours

CARRYOUT DELIVERY

Carryout Menu & Hours

M Tu W Th F Sa Su

Start Time	End Time	Menu Group	Visibility	Delete
12:00 AM	12:00 PM	Brunch	Visible	Yes
12:00 PM	5:00 PM	Lunch	Visible	Yes
5:00 PM	12:00 AM	-- NO GROUP --	Hidden	Yes

M Tu W Th F Sa Su

Start Time	End Time	Menu Group	Visibility	Delete
12:00 AM	11:00 AM	Brunch	Visible	Yes
11:00 AM	3:00 PM	Lunch	Visible	Yes
3:00 PM	12:00 AM	-- NO GROUP --	Hidden	Yes

M Tu W Th F Sa Su +

Under here you can configure the typical availability times for Carryout & Delivery for Online Ordering and which **Menu Groups** are available to order from at particular times.

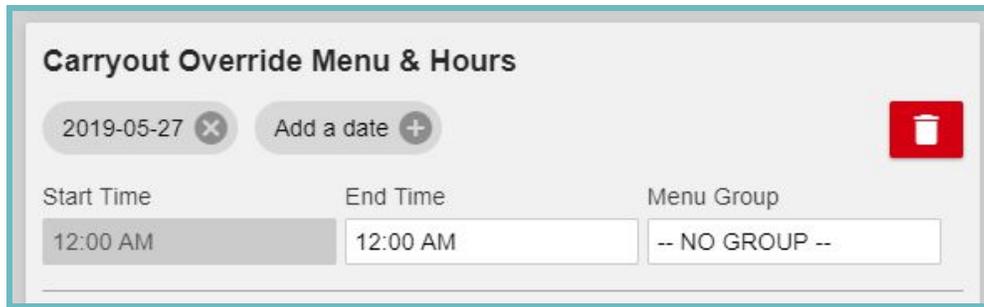
You can create multiple sets of Menu availability by selecting the **Add**  button. This would allow you to have different hours of availability on weekends for example.

Any times that will not have availability simply leave as **No Group**.

Override Menu & Hours

Under here you can configure dates with special availability or days that will not have *any* availability. On these dates it will go off of the times configured here rather than the standard schedule.

If you want to configure a day where Online ordering will not be available, select your desired dates with the **add a date** button and then have no menu group assigned to it for any timeframe showing.



Carryout Override Menu & Hours

2019-05-27

Start Time: 12:00 AM End Time: 12:00 AM Menu Group: -- NO GROUP --

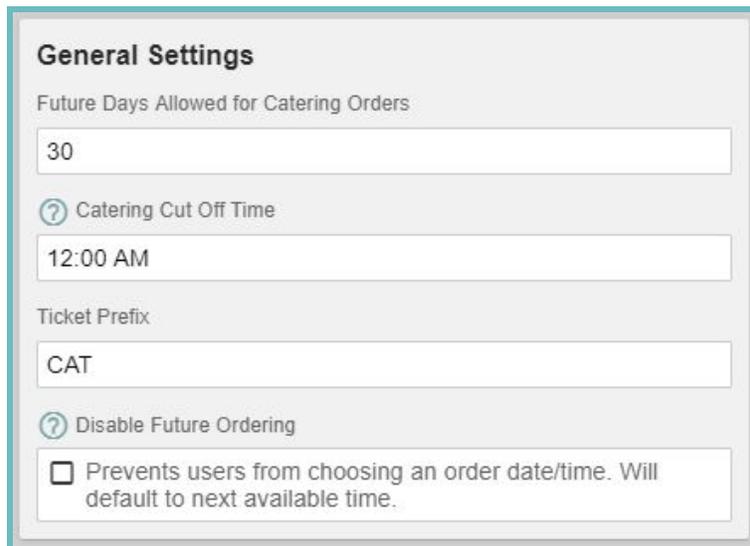
Catering Tab

This tab contains settings specific to catering. Some settings mirror the same as what is configured on the Online Ordering tab (but, configured separately for catering). If you need catering enabled for one of your Accounts please contact EarlyAccess@heartland.us.

What is my Catering URL?

Your Catering web address is your **URL Subdomain** (configured on the **General Tab**) with -catering. for example, if my **URL Subdomain** is 'yourlocationname.hrpos.heartland.us' then my catering web address would be 'yourlocationname-catering.hrpos.heartland.us'.

Catering General Settings



General Settings

Future Days Allowed for Catering Orders: 30

Catering Cut Off Time: 12:00 AM

Ticket Prefix: CAT

Disable Future Ordering

Prevents users from choosing an order date/time. Will default to next available time.

Future Days Allowed for Catering Orders

This is how many days in the future a customer can schedule a catering order. Currently you can set it up to 30 days.

Catering Cut Off Time

This is the latest time a customer can place a catering order on a particular day to receive it the next day. Orders will not be allowed past the time configured here.

Ticket Prefix

You can optionally configure a ticket prefix specific to catering orders.

Disable Future Ordering

This prevents customers from scheduling a Catering order for a future time. It will default to the next available time.

Catering Carryout/Delivery Settings

Settings in each of these sections are identical but, just effect either Carryout or Delivery behavior for catering. References to settings below will not contain 'Delivery' or 'Carryout' in front of them.

Carryout Settings	Delivery Settings
Allow Carryout <input checked="" type="checkbox"/> Allows customers to place catering orders for carryout.	Allow Delivery <input checked="" type="checkbox"/> Allows customers to place catering orders for delivery.
Carryout Room Catering Room	Delivery Room Catering Room
Carryout Payment Types Both	Delivery Payment Types Both
Carryout Minimum 20.00	Delivery Minimum 50.00
Carryout Maximum 500.00	Delivery Maximum 1000.00
<input checked="" type="checkbox"/> Carryout Tips Allowed Allows customers to add a tip to carryout orders before submitting.	<input checked="" type="checkbox"/> Delivery Tips Allowed Allows customers to add a tip to delivery orders before submitting.

Allow

Allows customers to place orders of this service type for Catering.

Room

Specific Room tickets for catering orders of this service type will be put under.

Payment Types

You can set the form of payment you accept for catering orders here:

In Person- only payment in person will be taken.

Credit- only payment by Credit card will be taken.

Both- In Person or Credit payments are acceptable.

Minimum

Set the Minimum order total for the service type. For instance if I set it to \$5 and a customer tries to place an order for \$3 it will not let them.

Maximum

Set the Maximum order total for the service type. For example, if I set it to \$50 and a customer tries to place an order for \$60 it will not let them.

Delivery Area

This is described in detail earlier in this document(find it [here](#)). All settings are the same, the only difference is that this area configured on this tab only applies to catering orders.

Catering Schedules

This is described in detail earlier in this document(find it [here](#)). All settings are the same. the only difference is that the schedules configured on this tab only apply to catering orders.