

Heartland

Restaurant

Order Balancing Setup Guide

Table of Contents

Overview	1
Configuring Order Balancing	1
Schedules Area	2
Exclude or Include Items on Order Balancing	3
Order Balancing in Action.....	3

Date	Product Version	Author	Summary
04/20/2021	6.30	JD	Original document introduced.
06/01/2021	6.40	JD	Section added on Exclude or Include Items .

Overview

This article describes how to configure a Heartland Restaurant site to use the Order Balancing feature set. The Order Balancing features enable you to set the program to automatically adjust the carryout or delivery times of eCommerce orders (Online Ordering and Guest App Orders), based on the projected capacity of the kitchen to prepare a certain number of items during ten-minute intervals. By doing so, Order Balancing can provide customers more accurate and realistic pickup and delivery times.

For instance, if the kitchen can prepare four items during an average ten-minute interval, you can set the program to automatically move the eCommerce order's carryout or delivery time to a later time slot if the order includes more than four items. If the site already has items from other orders in the requested time slot, the program will search for the earliest available time slots (within the order balancing schedule) after the requested time. It will apply the items in the order to those available time slots, calculate when the full order will be ready, and display the adjusted carryout or delivery times to the customer.

The number of items that the kitchen can prepare during an interval might vary during different times of the day or days of the week. Therefore, the program enables you to define order balancing schedules that apply different capacities during different periods on each day of the week.

To use Order Balancing, the site must run Heartland Restaurant version 6.30 or later.

Configuring Order Balancing

You can configure a site to use the Order Balancing feature in the Online Ordering screen.

- 1 In the Admin Console's Main Menu, click **Location Setup**, then click **Online Ordering**.
- 2 In the Online Ordering screen, click the **Order Balancing** tab.

GENERAL ONLINE ORDERING CATERING ORDER BALANCING

General Settings

Order Balancing Enabled

Limit the volume of online orders based on kitchen capacity for items

Schedules

Kitchen Capacity Leading Up to Order Balancing Schedule

M Tu W Th F Sa Su

Start Time	End Time	Total Kitchen Capacity
10:00 AM	1:59 PM	4
2:00 PM	5:59 PM	2
6:00 PM	10:00 PM	4


- 3 Select the **Order Balancing Enabled** check box.

When you select this check box, the program will apply the Order Balancing schedules to limit the pace of incoming eCommerce orders.

- 4 In the **Kitchen Capacity Leading Up to Order Balancing Schedule** box, enter the maximum number of items that the kitchen can manage in the ten-minute period that precedes the start time of each schedule.


In scenarios where a new schedule starts immediately after another one ends, this does not apply to the new schedule.

This number should include in-store and eCommerce orders. The program will use this number as a factor in balancing the incoming eCommerce orders in the earliest order balancing schedule.

- 5 In the **Schedules** area, add one or more order balancing schedules to the list. (For specific descriptions of these controls, see below.)
- 6 After entering the appropriate settings, click  to save your settings.

Schedules Area


You can use the controls in the **Schedules** area to designate the days of the week and times during each day when the program applies the order balancing schedules to incoming eCommerce orders. By selecting one or more of the day buttons, you can set which days of the week the order balancing schedules are applied.




Start Time	End Time	Total Kitchen Capacity [?]
10:00 AM	1:59 PM	4
2:00 PM	5:59 PM	2
6:00 PM	10:00 PM	4

Each schedule in the list features a **Start Time** and **End Time** box. By entering a time of day in each of these boxes, you can set a time range within each selected day when the program applies the schedule to incoming eCommerce orders.

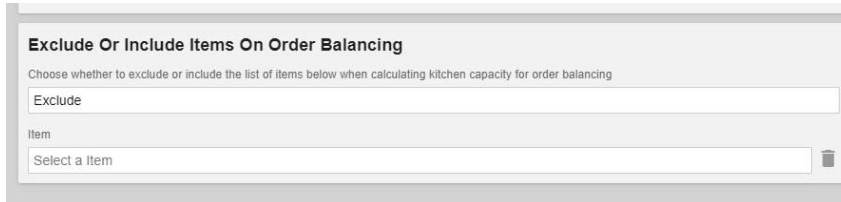
Each schedule in the list also features a **Total Kitchen Capacity** box. In this box, enter the maximum number of menu items that the kitchen can prepare during a ten-minute interval within the range of the schedule's start and end times. This number should include in-store and eCommerce orders.

If you click , the program will add a set of schedule controls, enabling you to set an additional order balancing schedule to the list.


If you click , the program will delete all of the order balancing schedules in the list.

Exclude or Include Items on Order Balancing

The controls in this area enable you to set the POS to only apply order balancing to specific items or to exclude certain items from order balancing.



In the **Include/Exclude** list, you can set the program to either include or exclude the items listed below from order balancing. If you select **Exclude**, the program will apply order balancing to all items except the items you add to the **Item** list. If you select **Include**, the program will only apply order balancing to the items you add to the **Item** list.

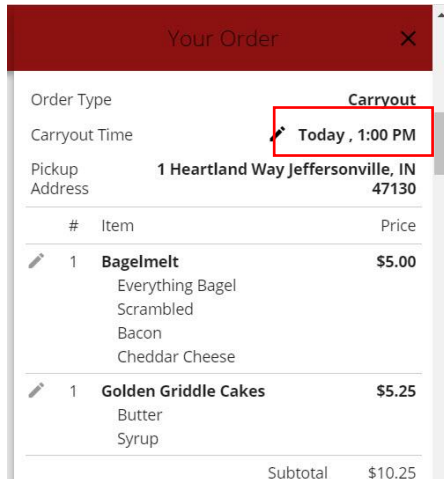
After selecting an option in the **Include/Exclude** list, you can select one or more items to include or exclude in the **Item** list. To remove an item from the list, click  next to the item.

Order Balancing in Action

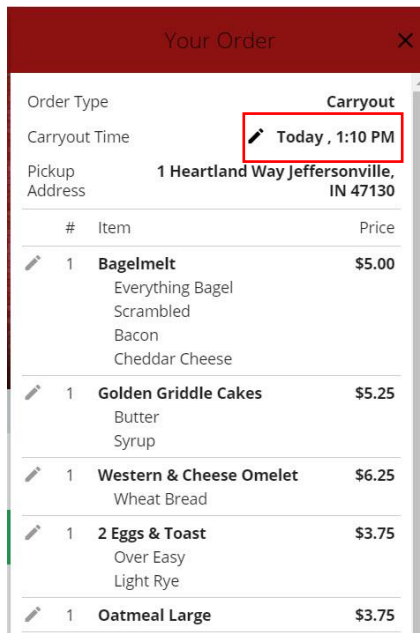
If you place an order at the POS with a specific pickup time, the POS will use the time when the order is sent, not the pickup time, as the starting point for adding its items to the order balancing schedule. For instance, if you create an order with a pickup time of 3:00 PM, but send the order at 1:00 PM, the program will add the order's items to the order balancing interval starting at 1:00 PM. Once that interval is full, it will then add the order's remaining items to the 1:10 PM interval, then the 1:20 PM interval, and so on, until all items are added.

If you place an order in the Online Ordering website or an app, the POS will use the pickup time as the starting point for adding its items to the order balancing schedule, and then add extra items to the intervals *preceding* the pickup time. This will enable the kitchen to prepare all items in the order before the pickup time, and provide the customer with the freshest possible food. For instance, in the Online Ordering website or app, if you create an order with a pickup time of 3:00 PM, the program will add the order's items to the order balancing interval starting at 2:50 PM and, once that interval is full, add the order's remaining items to the 2:40 PM interval, then the 2:30 PM interval, and so on, until all items are added.

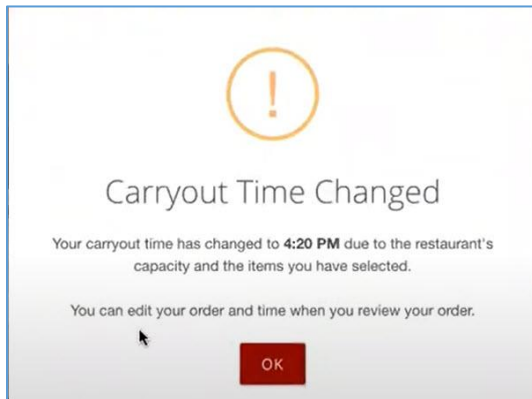
In the Online Ordering website, if you place an order to be prepared as soon as possible, the website displays the ready time on the Cart panel. If you add more items to the cart and the count exceeds the total kitchen capacity for the first ten-minute interval, the program will calculate the earliest time when the order can be ready and display this new time in the cart.



If you add more items and the count exceeds the capacity for the original ten-minute interval, the program will recalculate the earliest time when the order can be ready and display this new time in the cart. And so on.



If a customer places a future order, and then adds enough items to move the order into a later order balancing time interval, the program will immediately display a message alerting the customer that the delivery or carryout time has changed.



If a customer places a future order, adds items to the cart, and then changes the delivery or pickup time to a time that does not provide the restaurant enough time to prepare the entire order, the program will immediately display a message alerting the customer that the delivery or carryout time has changed.

In cases where an order balancing schedule ends at the same time as the Online Order menu ends, and the order is too large for the site to prepare before the end of the day, the program will immediately display a message alerting the customer that the order is too large and instructing them to call the restaurant. When the customer calls the restaurant, the merchant can decide whether to accept or deny the order.

If the order balancing schedule ends before the Online Order menu schedule ends, and an order is too large to be prepared before the order balancing schedule ends, the program will move it to the earliest eCommerce order time available after the order balancing schedule ends. For instance, if the order balancing schedule ends at 3:00 PM, and an order has a carryout lead time of 10 minutes, the program will move the order to 3:10 PM.