

# Heartland

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# Restaurant

Scan to Order Setup Guide

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| Date       | Product Version | Author | Summary  |
|------------|-----------------|--------|--|
| 04/05/2021 | 6.30            | JD     | Original document introduced.  |
| 06/01/2021 | 6.40            | JD     | <b>Show Required Fields</b> check box added.                                   |
| 06/25/2021 | 6.45            | JD     | Added procedures for exporting table list from within the Rooms layout screen. |

# Overview

This article describes how to configure a Heartland Restaurant site to use the Scan to Order feature set. The Scan to Order features enables customers to use a site's Online Ordering website to order meals from a table for dine-in service. With this feature, a customer can enter a site, sit at a table, scan a QR code that represents the table, and then order items in the site's Online Order website. The site will then be prepared and brought to the table.

At this time, only customers with existing loyalty accounts will be able to log in and use the Scan to Order feature. Also, the Scan to Order interface does not allow customers to reorder items from their saved order history.


To use Scan to Order, the site must run Heartland Restaurant version 6.30.

# Configuring Scan to Order

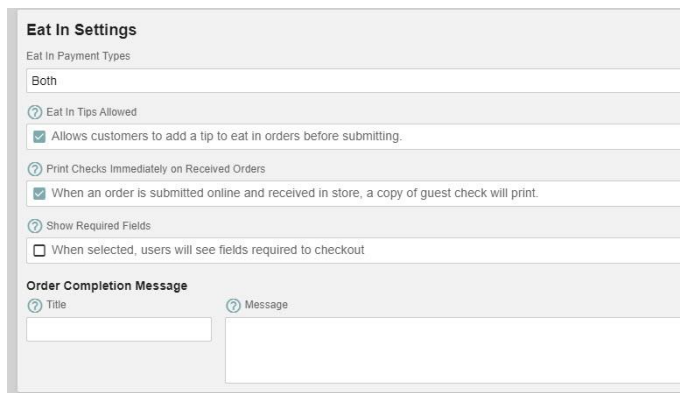
You can configure a site to use the Scan to Order feature in the Online Ordering screen. Unlike delivery or carryout service, the site must have at least one room set to use a room layout in order to use the Scan to Order "Eat In" service.

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

The screenshot shows the Admin Console interface for Heartland Restaurant. On the left is a navigation menu with categories like News, Account Info, Location Setup, App Ordering, Rooms, Custom Tenders, Paid In & Out Types, Payout Apportions, Tip Out Types, Dayparts, Payment Gateway, Staff, Job Types, Labor Categories, Scheduled Shifts, Permissions, Report Access, Break Types, Time Punches, Clock In Messages, Authorized Tablets, Payment Terminals, Printers, Display Formats, Customer Receipt, and Quickbooks. The main content area is titled 'GENERAL ONLINE ORDERING CATERING'. Under 'General Settings', there are options for Language Switcher, Future Days Allowed for Online Orders (set to 1), Ticket Prefix (OO), Disable Future Ordering, Allow Gift Purchases (checked), Auto Close eGift Tickets (checked), eGift Room (Bar), and Send ASAP Orders Without Hold Time. At the bottom, there are tabs for CARRYOUT, DELIVERY, and EAT IN (highlighted in red). Below these tabs is the 'Carryout Settings' section, which includes 'Carryout Supported' (checked).

- 3 In the **Eat In** tab, enter the appropriate settings (see below) for the location's schedule and menu.
- 4 After entering the appropriate settings, click  to save your settings.

## Eat In Settings



**Eat In Payment Types:** This list enables you to specify what type of payments are acceptable for “eat in” orders. If you select **Credit Card**, the webpage will include controls allowing customers to pay with a credit card before submitting the order. This will be the only available method of paying for “eat in” orders.

If you select **In-Person**, the webpage will enable the customer to submit an order without paying for it on the webpage. It will create an unpaid ticket on the POS, and the server will need to perform the payment directly for the customer.

If you select **Both**, the webpage will allow customers to pay with credit cards when submitting an order, or wait and give payment to a server in person.


**Eat In Tips Allowed:** If you select this check box, the webpage will display controls that enables customers to add a tip amount to an “eat in” order in the webpage before submitting the order. This option only applies to scenarios where the customers pay with credit cards. It has no effect on transactions where the customer leaves a tip with In-Person payment.

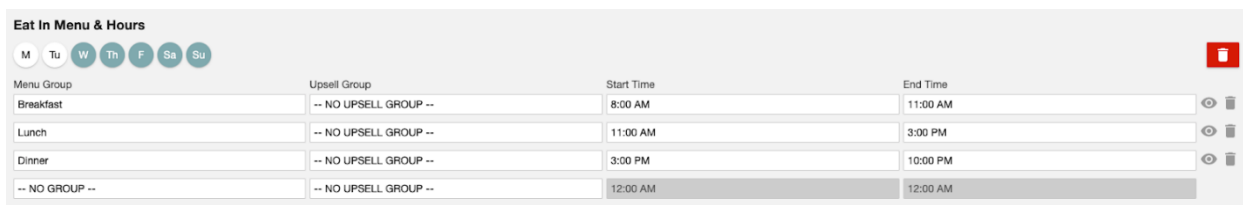
**Print Checks Immediately on Received Orders:** If you select this check box, the POS will print checks for “eat in” orders immediately upon receiving them from the Online Ordering site.

**Show Required Fields:** If you select this check box, the Online Ordering site will display all boxes for required customer information (name, phone number, and email address) when a customer pays a ticket. If you clear this check box, the Online Ordering site will not display the **Name**, **Phone Number**, and **Email Address** boxes for required customer information when a customer pays a ticket. This control enables you to hide boxes for contact information that is not necessary for Eat In service.

**Order Completion Message:** These boxes enable you to add a customized text message that will display when customers complete an order in the Online Ordering website. Using these controls, you can create a closing message for online “eat in” orders.

In the **Title** box, type a title for the message. In the **Message** box, type the text of the full message. In the Online Ordering website, when a customer submits an order, the website will display your custom title and message in the order confirmation screen. It will also include the custom title and message in the customer's order confirmation email.

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



| Menu Group     | Upsell Group           | Start Time | End Time |
|----------------|------------------------|------------|----------|
| Breakfast      | -- NO UPSSELL GROUP -- | 8:00 AM    | 11:00 AM |
| Lunch          | -- NO UPSSELL GROUP -- | 11:00 AM   | 3:00 PM  |
| Dinner         | -- NO UPSSELL GROUP -- | 3:00 PM    | 10:00 PM |
| -- NO GROUP -- | -- NO UPSSELL GROUP -- | 12:00 AM   | 12:00 AM |

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

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

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

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

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

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

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

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

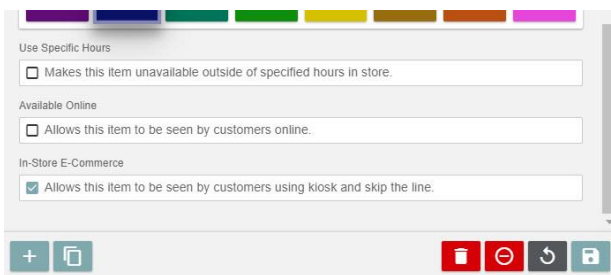
In the **Menu Group** list, select the menu group whose items you want to make available for “eat in” service during the selected days of the week.

## Adding Items to the Eat In Menu

To include an item in the menu on the eat-in online order website, you must enable the In-Store E-Commerce option for the specific item, its menu section, or its menu group.

### To Add a Menu Item to the Eat-In Menu


- 1 In the Admin Console’s Main Menu, select **Account Menu**, then click **Item**.
- 2 In the Item screen, select an existing item.
- 3 Select the **In-Store E-Commerce** check box.

A screenshot of a software interface for item settings. At the top, there is a horizontal bar with several colored segments (purple, blue, green, yellow, orange, pink). Below this, there are three sections, each with a checkbox and a text label: 'Use Specific Hours' with the label 'Makes this item unavailable outside of specified hours in store.', 'Available Online' with the label 'Allows this item to be seen by customers online.', and 'In-Store E-Commerce' with the label 'Allows this item to be seen by customers using kiosk and skip the line.' The 'In-Store E-Commerce' checkbox is checked. At the bottom of the form, there are several icons: a plus sign, a document icon, a trash can, a minus sign, a refresh icon, and a save icon.

- 4 Click  to save the item’s settings.


The program will include the menu item in the eat-in menu.

### To Add a Menu Section to the Eat-In Menu

- 1 In the Admin Console’s Main Menu, select **Account Menu**, then click **Section**.
- 2 In the Section screen, select an existing menu section.
- 3 Select the **In-Store E-Commerce** check box.
- 4 Click  to save the section’s settings.

The program will include all menu items in the menu section in the eat-in menu.

## To Add a Menu Group to the Eat-In Menu

- 1 In the Admin Console's Main Menu, select **Account Menu**, then click **Group**.
- 2 In the Group screen, select an existing menu group.
- 3 Select the **In-Store E-Commerce** check box.
- 4 Click  to save the group's settings.

The program will include all menu items in the menu group in the eat-in menu.

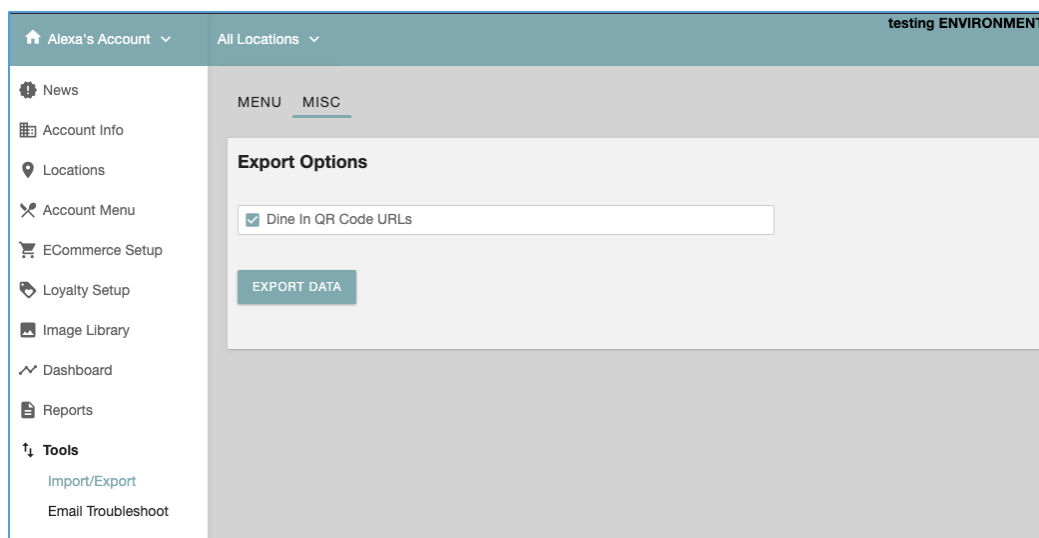
## Export QR Code URLs for Tables

After configuring the Eat In settings, you must create QR codes for the tables that will be available for Scan to Order service. Each table must have a QR code, which the program will print on each customer's "eat in" ticket.

To assign QR codes to the site's tables, you can generate an Excel spreadsheet listing all tables in the site, which includes each table's location, room, name, and QR code URL. You can then use this list to create a QR code for each table. You can generate this list of tables in the Admin Console, either in the Import/Export screen or the Rooms screen.

### Exporting QR Code URLs (Tools)

- 1 In the Admin Console's Main Menu, click **Tools**, then click **Import/Export**.
- 2 In the Import/Export screen, click the **Misc** tab.
- 3 Select the **Dine In QR Code URLs** check box.



#### 4 Click Export Data.

| location_name          | room_name | table_name | qr_code_url   |
|------------------------|-----------|------------|---|
| Sven's Smörgåsbord     | Patio     | Table 1    | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=227974 |
| Sven's Smörgåsbord     | Patio     | Table 2    | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=227975 |
| Sven's Smörgåsbord     | Patio     | Table 3    | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=227976 |
| Sven's Smörgåsbord     | Patio     | 3          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228146 |
| Sven's Smörgåsbord     | Patio     | 4          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228147 |
| Sven's Smörgåsbord     | Patio     | 5          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228148 |
| Sven's Smörgåsbord     | Patio     | 6          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228149 |
| Sven's Smörgåsbord     | Patio     | 7          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228150 |
| Sven's Smörgåsbord     | Patio     | 8          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228151 |
| Sven's Smörgåsbord     | Patio     | 9          | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228152 |
| Sven's Smörgåsbord     | Patio     | 10         | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228153 |
| Sven's Smörgåsbord     | Patio     | 11         | https://order.hrposdev.com/new?locationId=8706059761&orderType=3&tableId=228154 |
| Sven's Smörgåsbord III | Patio     | Table 1    | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228287 |
| Sven's Smörgåsbord III | Patio     | Table 2    | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228288 |
| Sven's Smörgåsbord III | Patio     | Table 3    | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228289 |
| Sven's Smörgåsbord III | Patio     | 3          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228290 |
| Sven's Smörgåsbord III | Patio     | 4          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228291 |
| Sven's Smörgåsbord III | Patio     | 5          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228292 |
| Sven's Smörgåsbord III | Patio     | 6          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228293 |
| Sven's Smörgåsbord III | Patio     | 7          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228294 |
| Sven's Smörgåsbord III | Patio     | 8          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228295 |
| Sven's Smörgåsbord III | Patio     | 9          | https://order.hrposdev.com/new?locationId=2107043892&orderType=3&tableId=228296 |

The program will generate an Excel spreadsheet that includes a list of all tables in the site. For each table, the report will include the table's location, room, name, and QR code URL.

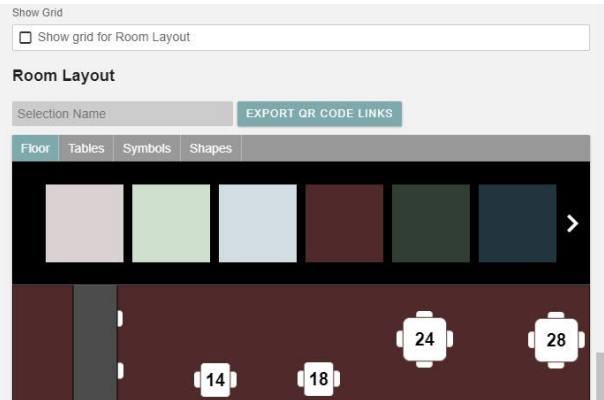
After generating the list, you can use it to create a QR code for each table. To do this, you must use a third-party QR code generator to create a QR code version of each table's URL. Using a third-party QR code generator, you can generate a QR code for each table, print the QR code, and then display the QR code at the table it represents.

Later, when a seated customer is ready to place an order, the customer can scan the table's displayed QR code with their phone. The app will access the site's online ordering site. The customer can then place an order in the site.

## Exporting QR Code URLs (Rooms)

- 1 In the Admin Console's Main Menu, click **Location Setup**, then click **Rooms**.
- 2 In the Rooms screen, select an existing room with a table layout.

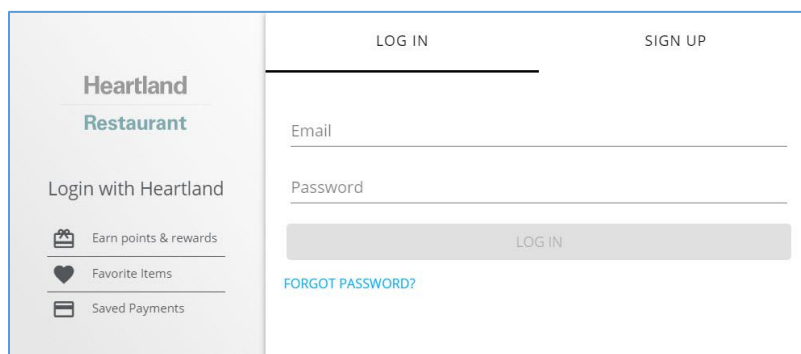
- 3 In the room's settings panel, in the **Room Layout** area, click **EXPORT QR CODE LINKS**.



The POS will export a list (in CSV format) of the tables in the selected room, including each table's location, room, name, and QR code URL.

## Using Scan to Order

- 1 After sitting at a table, scan the table's QR code with a mobile device.  
The device accesses the site's online ordering website.
- 2 Add one or more items to the ticket, then click **Checkout** in the Your Order panel.
- 3 If you have an existing loyalty account, click **Login**, then enter a valid email address and password.



- 4 To create a new loyalty account, click the **Sign Up** tab and enter the necessary customer information.
- 5 In the Checkout screen, in the **Enter your info** area, enter a name, email address, and phone number.

In the current version, customers must enter a name, email address, and phone number to use the Scan to Order service.

- 6** In the **Enter your info** area, select a payment method.

If you select **New credit card** or **New gift card**, the website will prompt you to enter the necessary card information.

- 7** If the **Leave a tip?** option is available, you can enter a tip by tapping **Yes** and entering a tip amount in the **Custom Tip Amount** box.

- 8** Click **Submit Your Order**.

The website will send the order, linked with your table, to the POS. It will also display the **Your order has been submitted** screen.

- 9** If desired, you can click a rating in the Rate your online experience area, and enter comments in the **Comments** box.

The program will include these comments in the Customer Feedback report, labeled specifically as a Dine-In Order.

| All Reviews       |          | All Ratings    |        |              |
|-------------------|----------|----------------|--------|--------------|
| Time Submitted    | Customer | Source         | Rating | Message      |
| 03/15/21, 10:02am |          | Dine-In Orders | 5/5    | Great food!! |

# Scan to Order in the POS

When a customer submits an order, the POS creates a ticket for the order. In the Floor Plan screen, the POS displays the selected table as occupied. The table icon's color will indicate if the ticket is paid or unpaid.



If a server opens the ticket, the POS will include the customer's name, phone number, and email address (if provided) in the ticket's information panel. The ticket number will feature the "OLO" (online order) prefix.

|                                 |               |                             |                        |
|---------------------------------|---------------|-----------------------------|------------------------|
| CERT Heartland<br>9:10 AM   81% |               | DEMO MODE                   |                        |
| Layout: 0 #T1                   |               | Ticket #OLO1                |                        |
| Comments                        |               |                             |                        |
| 1 <b>Chicken Fingers</b>        | <b>\$6.00</b> | Phone                       | Guest #                |
| BBQ                             | \$0.00        | 3344065522                  |                        |
| Honey Mustard                   | \$0.00        | Company                     | Guest Name             |
| Sriracha                        | \$0.00        |                             | Smith                  |
| 1 <b>Mozzarella Sticks</b>      | <b>\$7.00</b> | Email                       | Credit Card Name       |
|                                 |               | smith@mail.com              |                        |
|                                 |               | Address                     | Suite                  |
|                                 |               | City                        | State Zip              |
|                                 |               | Delivery Instructions       |                        |
|                                 |               | Alternate ID or Card Number |                        |
|                                 |               | Room/Owner                  |                        |
|                                 |               | Server                      | Admin                  |
|                                 |               | Room/Table                  | Layout / 0             |
|                                 |               | Guest Count                 | 1                      |
|                                 |               | Ticket Status               |                        |
|                                 |               | Hold Ticket                 |                        |
|                                 |               | Promise Time                |                        |
|                                 |               | Ticket Status               | Open                   |
|                                 |               | Paid Status                 | Unpaid                 |
|                                 |               | Created By                  | Admin                  |
|                                 |               | Ordered                     | Apr 5, 2021 at 9:07 AM |
|                                 |               | Closed                      |                        |
| Subtotal: \$13.00               |               |                             |                        |
| Sales Tax: \$0.78               |               |                             |                        |
| Total: \$13.78                  |               |                             |                        |
| <b>Total Due: \$13.78</b>       |               |                             |                        |

At this time, customers cannot create new Heartland Loyalty accounts with the Scan to Order feature. Only customers with existing loyalty accounts will be able to log in and order items with the Scan to Order feature. Also, the Scan to Order interface does not allow customers to reorder items from their saved order history.