

Heartland | **Mobile Manager**

Setup for Dinerware

Rev. 3/2019

Table of Contents

About This Document.....	1
Introduction	1
Overview	1
Implementation.....	1
Installation	1
System Requirements.....	1
Install or Upgrade Mobile Manager	2
Install Mobile Manager	2
Uninstall Mobile Manager.....	2
Configuration.....	3
At a Glance: Heartland Mobile Manager Console	3
Configure Heartland Mobile Manager	4
Start, Stop or Change Mobile Manager	5
Start Mobile Manager.....	5
Stop Mobile Manager	6
Reconciling Heartland Mobile Manager against an RFO.....	6
Primary Financial Key Stats	6

About This Document

Introduction

Dinerware is integrated with Mobile Manager, a real-time reporting and analytical mobile solution. Transaction information is synchronized with Mobile Manager, and the data is processed and is displayed on the Heartland Mobile Manager | ANALYTICS mobile application. Depending on the desired configuration, real-time data can display as frequently as every minute.

Mobile Manager consists of three main components:

- ▶ Mobile Manager: Installed on Dinerware Brain, Heartland Mobile Manager is used to transmit data.
- ▶ Admin Console: User, Events, Settings and Alert Configuration
- ▶ Heartland Mobile Manager| ANALYTICS: Reporting, Updates and Alerts.

Overview

This guide describes how to install and configure and the Mobile Manager application. This guide is based on Dinerware v3.4 and greater using Heartland Mobile Managerv1.0.0.121. Please check the Dinerware Portal to be sure you have the latest documentation and build.

This document is intended for system operators or field service engineers who are responsible for installing and using Heartland Mobile Manager in conjunction with Admin Console and Heartland Mobile Manager| ANALYTICS. Basic knowledge of Dinerware is suggested.

Implementation

Heartland Mobile Manager is installed and configured in 4 easy steps:

- 1 Obtain configuration credentials.
- 2 Install Heartland Mobile Manager on the Dinerware Brain machine.
- 3 Configure Heartland Mobile Manager.
- 4 Verify Heartland Mobile Manager is working.

For credentials and to learn more on how to configure Mobile Manager, please review our article on [“Using the Heartland Mobile Manager Admin Console”](#).

Installation

This section will describe the process of installing Mobile Manager.

System Requirements

- ▶ Windows 7 or higher
- ▶ Dinerware version: [3.4 or higher]
- ▶ Microsoft .NET Framework 4 version 4.5.2

Install or Upgrade Mobile Manager

Download the Heartland Mobile Manager software on the Dinerware Brain machine. The setup program will install all necessary components. After installed and configured, Heartland Mobile Manager will start automatically on start up.

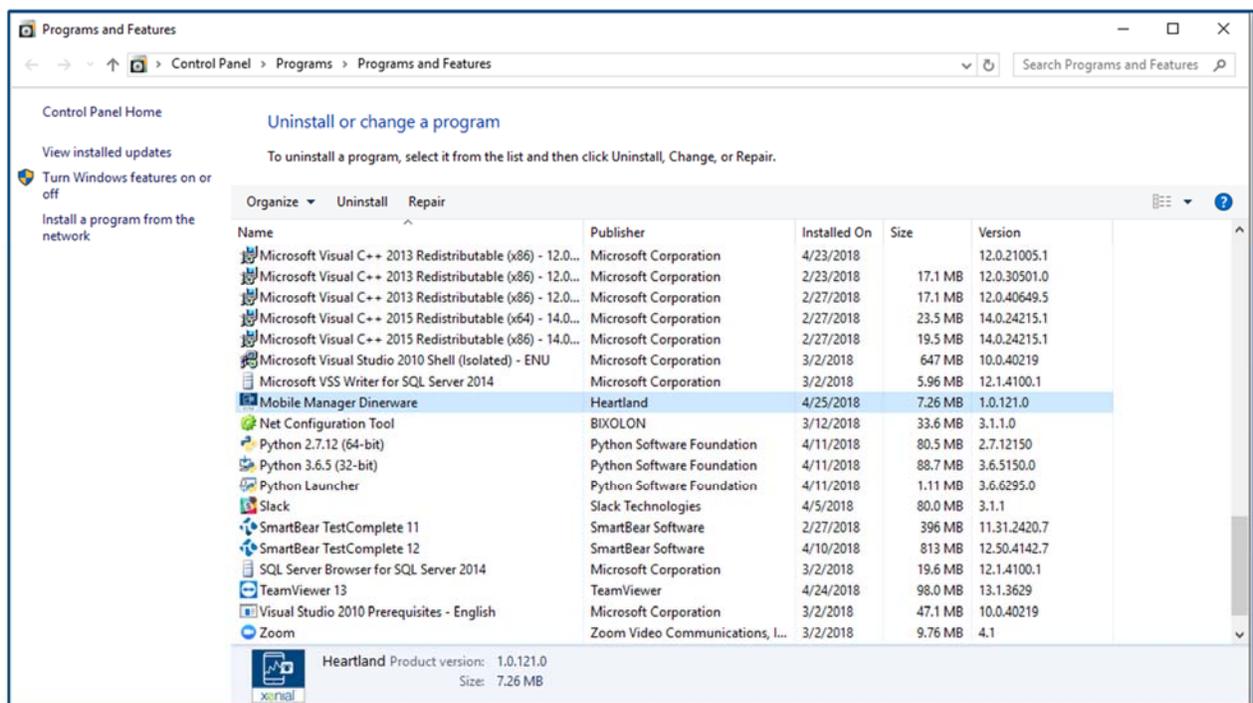
If you are upgrading your Heartland Mobile Manager application, please uninstall the prior version.

Install Mobile Manager

- 1 Navigate to the Heartland Dealer Knowledge Portal and download the Mobile Manager program.
- 2 Double-click the .msi file to start the installer.
Installation path - C:\Program Files (x86)\ Mobile Manager Dinerware
- 3 Accept the terms in the license agreement.
- 4 Follow the onscreen instructions to install Mobile Manager.

Uninstall Mobile Manager

- 1 At the **Start** menu, open the **Control Panel**.
- 2 From the **Programs** menu, click the option to **Remove** or **Uninstall a Program**. The Add or Remove Programs dialog box appears.
- 3 Select **Mobile Manager Dinerware**, then click **Remove**. The uninstall process starts.
- 4 Follow the on-screen prompts to remove the application.

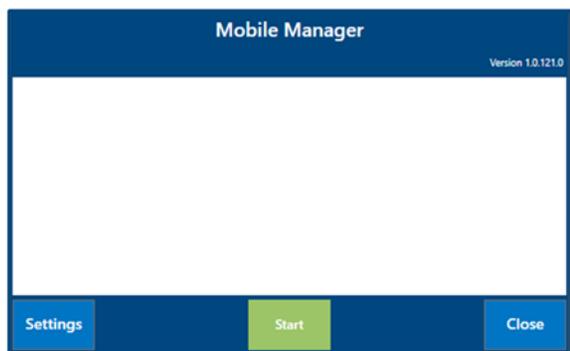


Configuration

This section describes how to configure communication for the Heartland Mobile Manager application.

At a Glance: Heartland Mobile Manager Console

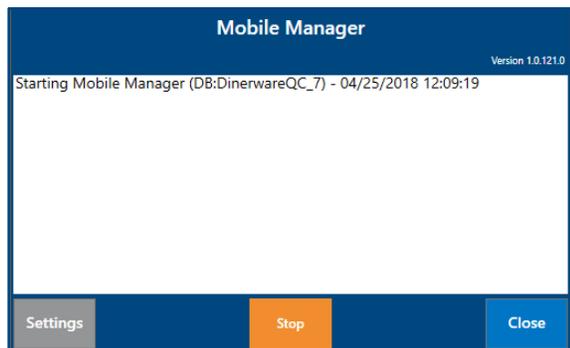
The Heartland Mobile Manager Console is used to configure communication and start and stop the Heartland Mobile Manager service. When Heartland Mobile Manager is opened, the screen will display as follows:



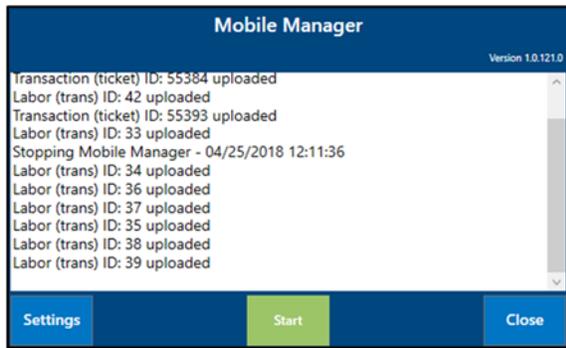
- ▶ **Settings** – Add or change Heartland Mobile Manager Configuration settings.
- ▶ **Start / Stop** – This starts and stops the Heartland Mobile Manager Service.
- ▶ **Close** – Shuts down the Heartland Mobile Manager application.

Once the Heartland Mobile Manager Application is started or stopped, the status will display within the application with a day and time stamp.

Example: Heartland Mobile Manager Status is Started.

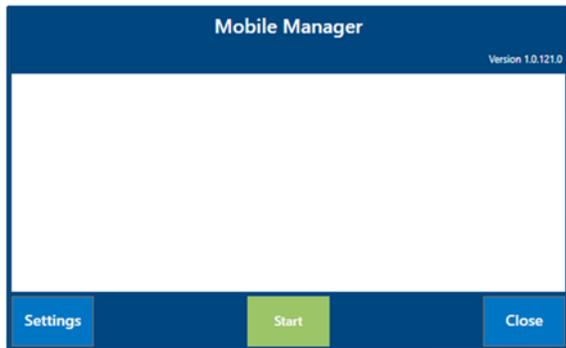


Example: Heartland Mobile Manager Status is Stopped.



Configure Heartland Mobile Manager

- 1 Double-click the **Mobile Manager** desktop icon to open Mobile Manager.
- 2 Click **Settings**. The Settings window appears.



- 3 Enter all Configuration Parameters.
 - ▶ **Restaurant Name** – Unique Restaurant name used for analytics filters.
 - ▶ **Brand** – The Dinerware Brand installed on the Brain machine.
 - ▶ **Polling Frequency** – Frequency changes in the Transaction information are uploaded. The default is 1 minute and can go up to 60.
 - ▶ **Labor Polling Frequency** – Frequency changes in the Labor information are uploaded. The default is 15 min and can go up to 60 min.
 - ▶ **Region Endpoint** – Location of your cloud based server
 - ▶ **Access Key ID** – Access Key ID. Equivalent to a user name.
 - ▶ **Secret Access Key** –Your password
 - ▶ **Bucket Name** – Where your data will populate
 - ▶ **Subfolder** – The folder that is assigned to your restaurant, bar or venue.
 - ▶ **Debug Output** – Writes XML locally for troubleshooting purposes.
 - ▶ **Date Filter** – Sets start date for upload process. Nothing before this date will be uploaded.
- 4 Click **Ok** to save changes.

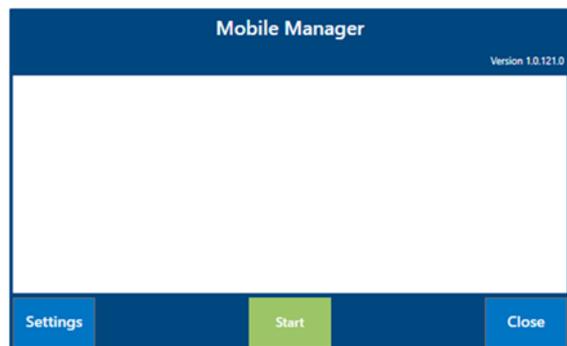
5 Click **Start** to start Mobile Manager. The Mobile Manager application starts.

**All of your AWS settings will contain readable text.

Start, Stop or Change Mobile Manager

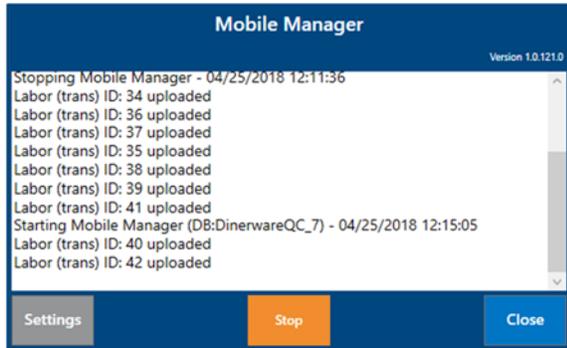
Start Mobile Manager

- 1 Double-click the Mobile Manager desktop icon to open Mobile Manager.
- 2 Click Start to start Mobile Manager. The Heartland Mobile Manager application starts and will start automatically with next reboot.



Stop Mobile Manager

- 1 Click the Mobile Manager icon in on the task bar.
- 2 Click **Stop**. The Heartland Mobile Manager application stops.



Reconciling Heartland Mobile Manager against an RFO

This section provides some basic guidance for reconciling basic Key Stats against a Dinerware Restaurant Financial Overview Report (RFO).

Primary Financial Key Stats

There are three main Key Stats that are configured for your account:

SUM of TOTAL_CHECKS	A running total of transactions, minus tips. Sales Income + Taxes + Gratuities.
SUM of RECEIPTS	A running total of incoming payments (such as Cash, VISA, MasterCard, and so on). Total of the Transactions by Tender Type.
SUM of SALES	A running total of Gross Sales. Should equal Total Gross Items.

Gross Sales by Revenue Class		Discounts	Cash Deposit	
Food	\$4,299.75	Manual Discounts	+ Cash In	\$0.00
N/A Beverage	\$211.90		- Cash Out	\$0.00
Beer	\$23.00	Total Manual	+ Cash Received	\$829.42
Glass Wine	\$566.00	Total Discounts	- Tips	\$809.81
Bottled Wine	\$270.00		- Donations	\$0.00
Liquor	\$593.45		- Change Given	\$0.00
Gross Sale	\$5,964.10		+ Tip Reduction	\$0.00
Total Gross Sale	\$5,964.10		+ Cash Over	\$0.00
Auto Discounts	\$0.00		= Cash Deposit	\$19.61
Total Gross Items	\$5,964.10	<--- SALES SUM	+ Checks	\$0.00
(incl. Auto Discounts)		Key Stat	= Total Deposit	\$19.61

Transactions by Tender Type		
Count	Tender Type	Amount
Tickets and Transactions		
4	Amex	\$965.35
5	cash	\$829.42
1	Discover	\$277.42
9	MasterCard	\$2,556.96
12	VISA	\$2,774.33
	Total	\$7,403.48
Total		\$7,403.48

<--- RECEIPT SUM
Key stat

Net Income by Revenue Class	
Food	\$4,299.75
N/A Beverage	\$211.90
Beer	\$23.00
Glass Wine	\$566.00
Bottled Wine	\$270.00
Liquor	\$593.45
Sales Income	\$5,964.10
Total Net Income	\$5,964.10

Voids by Type		
Count	Void Type	Amount
4	Joey:S FAMILY	\$258.65
1	PRICE CHECK	\$14.00
3	Regular Costumer Comp	\$19.95
1	Testing / Training	\$13.00
1	Wrong Table	\$25.50
10	Total	\$331.10

Net Sales by Day Part	
Dinner	\$4,954.15
Late Night	\$1,009.95
Net Sales	\$5,964.10
Total Net Sales	\$5,964.10

Taxes	
Sales Tax	\$439.86
Total Tax	\$439.86

TOTAL_CHECKS SUM Key Stat --->
will need to add gratuities

Service Fee	
Total	

Net Sales by Revenue Center			
Dining	25	\$5,069.85	
Bar	7	\$770.35	
Take Out	1	\$123.90	
Total	33	\$5,964.10	

Net + Taxes	\$6,403.96
--------------------	-------------------

Tips	
auto gratuities	\$189.71
manual gratuities	\$0.00
tips	\$809.81
Total Tips	\$999.52
Total Service Fee	\$0.00