

Heartland | **POS**

Optimum Control Dealer Integration Guide

May 2020

Disclosure

This document was created for the Heartland POS authorized dealer community. It is private and contains confidential information. It is intended for internal Dealer use only and is not to be given in printed or electronic format to end-users or third-party companies.

Program Overview

Optimum Control Integration with Heartland Restaurant

By integrating Heartland POS with Optimum Control's Sales Export, restaurants and bars are able to leverage accurate sales and inventory data to make the most informed decisions possible. This integration is easy-to-use; simply select the Heartland POS interface, choose the configuration you'd like to use (.csv or directly imported into the OC database), and Optimum Control will begin to automatically export your sales information from your POS. Once this is complete, you'll have all of your sales data at your fingertips in Optimum Control and ready for use in our 70+ reports.

Pricing

Optimum Control will bill merchants directly. OC Pro includes:

- Food Costing
- Recipe Costing
- Reporting
- Ordering
- Purchasing
- Catering
- Event management
- Nutritional analysis

An Optimum Control Professional subscription entitles you to one license with one store.

An Optimum Control Premier entitles you to one license with 3 stores, allowing you transfer inventory between.

Please contact Optimum Control directly for pricing details.

Boarding

To cancel your integration with Heartland Restaurant, please reach out to Optimum Control and speak to a Sales Rep.

For Heartland Restaurant: Dealers will be responsible for logging into the Heartland Restaurant portal and obtaining a merchant API Key from the Integrations page and providing that to Optimum Control during the boarding process. To learn how to obtain a merchant API Key, click [here](#).

Optimum Control Configuration and Training includes:

- Support staff will schedule an install session where the software is installed on the client's computer.

- Training sessions are then scheduled and include the following:
 - Session One: Navigation and Creating Suppliers and Items
 - Session Two: Scheduled after they have created all suppliers and items. Focuses on preps and product creation.
 - Session Three: How to deal with invoices and inventories.
- After these training sessions are complete, we can configure sales imports or any other additional add-ons.

Optimum Control Monthly Fee Includes:

- Access to the platform
- software updates
- Email and telephone support from 9am – 5pm CST, Monday to Friday.

Merchant Support Levels

Dealer will support:

- API Merchant Key administration
- Functionality on POS
- Escalations to Optimum Control

Heartland POS will support:

- Heartland POS functionality

Optimum Control Implementation Team will support:

- Installing and working with any new versions, updates, and email and telephone support.
- Training is available in three different packages ranging from 1 hours to 6 hours in duration, and is done through Go To Assist and Go To Meeting.
- We also offer Database Analysis, Database Development/Creation, and Item Importing from a Template **at additional costs**.

Dealer / Integrator Resources and Escalation Information

HPOS Product Technical Support: Contact your POS Technical Support

Optimum Control Sales: sales@tracrite.net

Optimum Control Set up & Support: support@tracrite.net

Optimum Control Billing Questions: accounting@tracrite.net

Full Listing of Contact Information for Optimum Controls can be located in the [Salesforce Rolodex](#).

Appendix

For Heartland Restaurant Retrieve API keys documentation, click [here](#).