

Heartland Customer Setup

Cloud Integration

1. Create a new permission

Once logged into your Heartland portal as an admin, click the "permissions" link in the left navigation menu.



2. Save new permission

Create a new permission that looks like the following, and click the save icon.

New Permission

Name *

bartrack

Publish Changes

☐ Allows access to publish changes.

Location Setup

☐ Allows access to edit pages under the setup tab.

Staff Members

☐ Allows access to edit staff related pages.

Menu

☐ Allows access to edit pages under the menu tab.

Loyalty

☐ Allows access to edit loyalty pages.

All Reports

☐ Allows access to run any current and future reports.

Sales Reports

☒ Allows access to run sales reports.

Payroll Reports

☐ Allows access to run payroll reports.

Labor Reports

☐ Allows access to run labor reports.

Loyalty Reports

☐ Allows access to run customer loyalty reports.

Gift Reports

☐ Allows access to run gift reports.

Batch Credit Card Reports

☐ Allows access to run batch credit card reports.



3. Create a new user

Click the “Users” link on the left navigation menu and then click the NEW button.



The screenshot shows a web application interface. At the top, there is a header bar with the text "My Company Name" and a search bar. Below the header, there is a left navigation menu with various links: News, Location Setup, Account Menu, Loyalty Setup, Image Library, Dashboard, Reports, Users, and Heartland Info Central. The "Users" link is highlighted with a red box. The main content area is currently empty, showing only the header and the left navigation menu.

4. Save user details

Fill out the user details.

New User

First Name *

Last Name *

Email *

Admin

☒ Allows access to anything and everything, overrides all permissions.

Permissions

Select a Location

Auto Logout Time

15 Minutes

Language

Location Default

Close Save

5. Make sure you set a location, and the permission you just defined by selecting Choose or Select a Permission.

First Draft Grayslake

Search

NEW

Email	Last Name	First Name	Last Login
technology+firstdraft@bartrack.beer	Track	Bar	10-19-23, 6:23 pm

Bar Track

First Name *

Bar

Last Name *

Track

Email *

technology+firstdraft@bartrack.beer

Admin

☐ Allows access to anything and everything, overrides all permissions.

Permissions

First Draft Grayslake

Create or Select a Permission

Select a Location

Auto Logout Time

15 Minutes

Language

Location Default

Daily Sales Email

☐ Receive daily sales email for live locations.

Excluded staff for user

Select a Staff Member

Add the following user and click the save icon.

bar track

First Name *

bar

Last Name *

track

Email * Enter your own company name after the plus, no spaces.

technology+mycompanyname@bartrack.beer

Admin

☐ Allows access to anything and everything, overrides all permissions.

Permissions Enter your company name below

My Company Name bartrack

Select a Location

Auto Logout Time

15 Minutes

Language

Location Default

Daily Sales Email

☐ Receive daily sales email for live locations.

+ [trash] [refresh] [save]

1. Await verification

An email will be sent to BarTrack for verification, please make sure we get this as soon as it's sent.

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