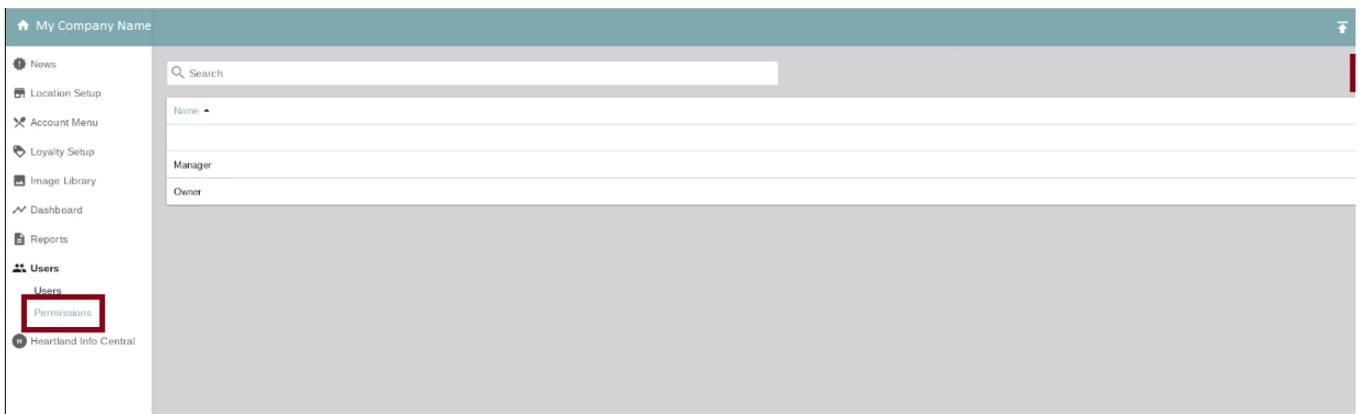


# Heartland Customer Setup

## 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.

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.



### 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

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

+ [Save] [Cancel] [Refresh]

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.

Revision #4

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Updated 20 October 2023 15:03:53 by Nick Cyr