

# 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 Namebartrack

Select a Location

Auto Logout Time

15 Minutes




Language

Location Default

Daily Sales Email

☐ Receive daily sales email for live locations.

+



## 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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