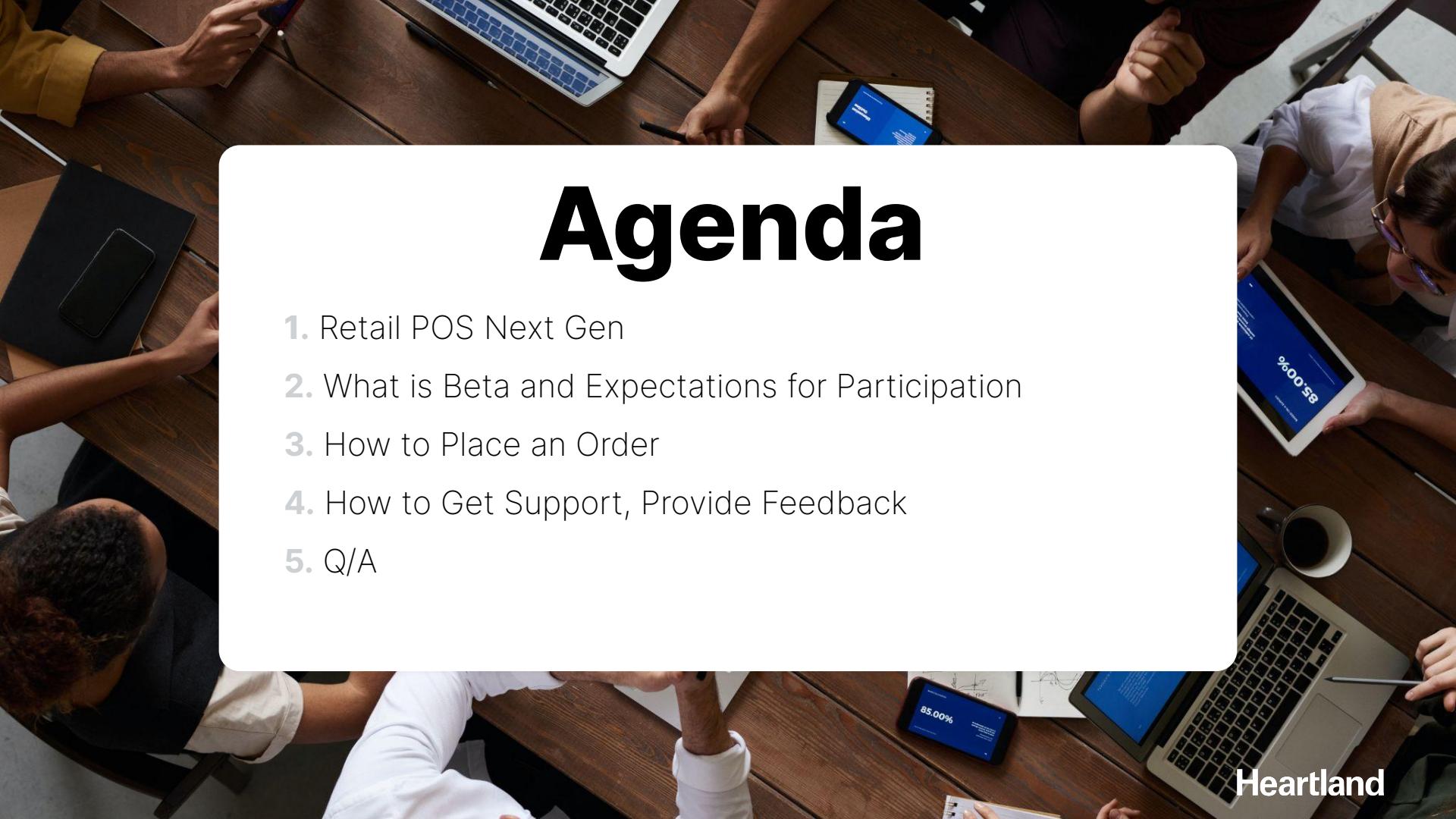




Retail Next Gen Beta Dealer Training

Heartland



Agenda

1. Retail POS Next Gen
2. What is Beta and Expectations for Participation
3. How to Place an Order
4. How to Get Support, Provide Feedback
5. Q/A

Retail POS

Next Gen

What is Retail POS Next Gen?

ANDROID

- ★ Faster and easier setup for merchants.
- ★ Greater control over how we manage software updates, using our own device management, with no more dependencies on vendor app store review cycles.
- ★ Greater amount of control over the exact hardware configurations and connections that our merchants need.
- ★ Competitive price point.
- ★ Long-term hardware option that protects us from sudden changes in screen size or camera positions
 - *Extremely disruptive to our supply chains.*
- ★ Simple ordering process



CUSTOMER FACING DISPLAY (CFD) / HEARTLAND READER

- ★ Thoughtful workflow that guides customers through the payment process.
- ★ Fully interactive touch screen and embedded Heartland Reader.
- ★ Carefully crafted CFD experience **based on customer research.**
 - *Ex: how to encourage higher tip elections simply through button placement.*
- ★ Detachable Customer Facing Display.

OR



HEARTLAND PAYAPP / VERIFONE

- ★ Provides payment workflow that is driven primarily by Global Payments UPA workflow.
- ★ Universal Payment Screens and Workflows.
- ★ Creates consistency for merchants.

Heartland

Retail POS

Android / Heartland Reader

Retail POS Android / Heartland Reader Bundle

BUNDLE

Heartland POS Workstation Z30 (Main sku)

- **Payment Component:** Heartland POS CFD 5500
- **Printer Component:** Star USB Printer, SKU: 39472380



Receipt Printer



* Shown with CFD on stand

OPTIONAL HARDWARE



Star Cash Drawer
CD4-1616SGY55-S2-HTL



**Barcode Scanner USB
(w/cradle)**
DS2278-SR7U2100PRW



Label Printer
Bixolon SLP-DX220G

Heartland

CFD with Heartland Reader

- ★ Custom for Heartland:
 - **Payment device option** for Heartland Android POS 15" Stand
- ★ Customer Facing Display (CFD) allows your customers to **preview sales in real time** on a secondary display. This helps **reduce errors** and **increase customer satisfaction** in your shop.
- ★ Widescreen **7" touchscreen monitor** can be **attached** to the rear of an Heartland Android POS 15" Stand **or tethered** to the POS Stand via USB cable
- ★ Accepts all card-based payments:
 - EMV
 - Magstripe (Swipe)
 - NFC/contactless
- ★ Available with a cradle for desktop use

CFD USE CASE

- Heartland Payments **ONLY**
- Counter service merchants
- Customizable **logo & graphics**
- **Detailed** Line items
- Display real-time **promos & coupons** to customers
- Larger customer screen



ELO Android POS Stand

DESCRIPTION

- ★ **15" screen** workstation
- ★ Interactive display
- ★ **Integrated connectivity** hub
- ★ **Contained cable** routing
- ★ Built-in Payment acceptance

I/O PORTS

- ★ Z30 POS Stand
- ★ DC input
- ★ **4 x USB-A 3.0 Port** (900mA)
- ★ **2 x USB-C**
- ★ RJ45 Ethernet LAN (Gigabit)
- ★ **USB-C output - CFD**
(DisplayPort, Touch and
Power Deliver up to 27W)

SPECIFICATIONS

- ★ **Memory (RAM):** 4GB
- ★ **Storage:** 64GB
- ★ **OS:** Android 10
- ★ **Weight:** 7.8 lbs / 3.5 kg
- ★ **Diagonal Size:** 15.6" diagonal,
Active matrix TFT LCD (LED)
- ★ **Aspect Ratio:** 16:9
- ★ **Resolution:** 1920 × 1080 @ 60Hz
- ★ **Webcam:** 8MP, 1920×1080 30fps,
Auto Focus
- ★ **Wireless:** 802.11a/b/g/n/ac +
Bluetooth 5.0
- ★ **Audio Ports:** 2x built-in digital
microphones
- ★ **Speakers:** 2× 0.8W
- ★ **Power Supply:** AC input voltage:
100-240 VAC
- ★ **Dimensions:** 14.87" x 9.8" x 0.9" /
377.7 mm x 249.7 mm x 22.3 mm



Android/Heartland Reader Bundle Limitations

- ★ Android with CFD/Heartland Reader **does not take PIN debit**, but will **accept contactless debit**.
- ★ Using the Moby Payment reader **requires Secure Submit**.
- ★ There are **no longer hard MCC restrictions**, however, underwriting would like to review the first 3 Beta sites that fall under the codes listed.

Send submissions to
Tiffany Howard
tiffany.howard@e-hps.com

5912 Drug Stores, Pharmacies. This needs to remain a restricted MCC, as keyed activity can require Compliance and Regulatory requirements up to and including Card Brand Registration and fees.

5921 Package Stores, Beer, Wine, Liquor. This needs to remain a restricted MCC, as keyed activity can require Compliance and Regulatory requirements and today, most keyed activity in this MCC are placed on our other Sponsor Bank.

5993 Cigar Stores and Stands (includes E-Cigs). This needs to remain a restricted MCC as keyed activity can require Compliance and Regulatory requirements up to and including Card Brand Registration and fees.

5099 Durable Goods (not elsewhere classified). A durable good is something that is not for immediate consumption and/or is able to be kept for a period of time. Products and/or services that can be classified under this MCC are firearms and ammunition; both of which have restrictions to any keyed activity. Also, this specific MCC is used for B2B audience, whereby nearly all B2B audience is keyed activity. Hence this MCC needs to remain restricted.

6051 Non-Financial Institutions. This needs to remain a restricted MCC, as keyed activity can require Compliance and Regulatory requirements up to and including Card Brand Registration and fees.

Retail POS

Android / Heartland PayApp

Retail POS Android / Verifone Bundle

BUNDLE

- **15" screen** workstation
- **Verifone T650c** for payments



OPTIONAL HARDWARE



Star Cash Drawer
CD4-1616SGY55-S2-HTL



**Barcode Scanner USB
(w/cradle)**
DS2278-SR7U2100PRW



Label Printer
Bixolon SLP-DX220G

Verifone Trinity T650c Countertop

- ★ Beautiful **Line Item Display**
- ★ Supports **Pin Debit**
- ★ Stunning **5.5" capacitive touchscreen**
- ★ **Full-motion video support** with high-quality audio
- ★ Optional receipt **printing in device**.
- ★ Leverages **Heartland Pay App**
- ★ Easily **accept payments anywhere**, including:
 - Credit/debit
 - EMV
 - NFC
- ★ **Enhanced data security** with every transaction with triple data encryption



Retail POS Comparative

Retail Next Gen POS - Verifone | Product Differentiator CFD vs Verifone



Heartland Retail supports Heartland Processing through the **Heartland Reader and ELO Customer Facing Display**.

Supported Features:

- Signature Capture
- Contactless
- **Customer Facing Display**
- Heartland Gift

*Requires Secure Submit credentials for Manual Entry



Heartland Retail supports Heartland Processing through the **Verifone T650c**

Supported Features:

- **EMV Pin Debit**
- Signature Capture
- Contactless
- **Line Item Display (Verifone)**
- Heartland Gift

What is Beta?

Expectations for Participation

Expectations for Beta Participation

- ★ **Attend this webinar** to learn more about the product, order process and customer setup, ask questions and participate!
- ★ Commit to a production performance of **2 merchants** closed/won no later than **3/15**
- ★ Provide **timely feedback** to help **improve our products**, services and go to market



How to Place an Order

Ordering Hardware



- When ordering hardware, be sure to **include** the **workstation**, the **receipt printer**, and the desired **payment device**.
- ***Optional Cash Drawer, Barcode Scanner and Label Printer can also be ordered***

[Retail Android Beta SKU Information](#)

Beta - Next Generation Retail SKU Checklist

Heartland POS Workstation Z30
(Customer Facing Display(CFD) can be set up either way as shown in the image)



&
Heartland POS CFD 5500



or

Verifone T650C



Heartland Thermal Printer (USB)
Star Micronics, TSP143IIIU, Thermal Printer (USB)



All other Skus are as normal such as cash drawer, Zebra Scanner, Bixolon Label Printer
Dealer Checklist February 2024

Resources | How to Get Support & Provide Feedback

Support Contact Information

- **Technical Support:** Merchants, Sales Reps and Dealers will contact normal support channels during beta:
 - **Phone:** **833-844-4767** Option 1 then Option 2
 - **Support Hours:** 24×7×365
 - **Email Support:** hretailsupport@heartland.us
- **Feedback:** Support or authorized Beta Sales Reps and Dealers may reach out to the beta team regarding feedback they or a merchant may have provided:
 - **Email:** HPOSBeta@heartland.us - 24 business hour SLA on response time
 - **Hours:** Mon-Fri 8a-5p ET
- [**Next Gen Boarding Guide**](#)

Q&A

Thank
You!

Other Resources

How to

Setup a Customer using Heartland Reader

Heartland Reader Configuration & Guide

Heartland Reader Configuration Guide

CONFIGURE PAYMENT GATEWAY

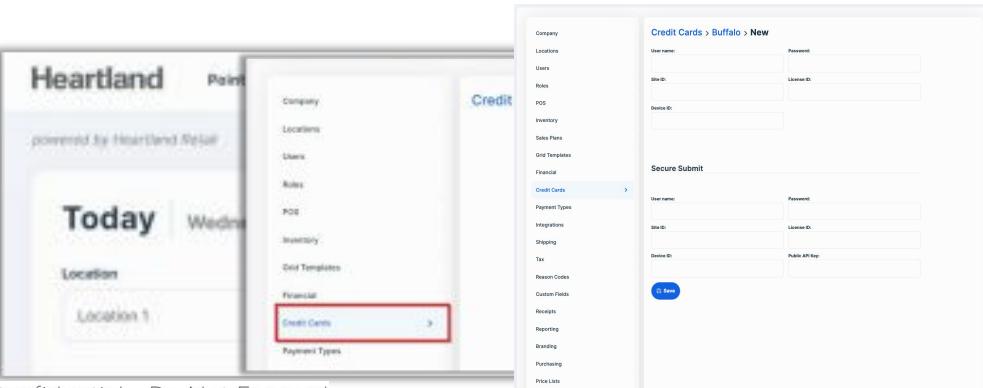
Enable the Heartland Gateway by following these steps:

★ From the POS, go to **Settings > Credit Cards** and select **Add Gateway**.

Select **Heartland** and select **Save**.

- ★ Enter credentials in the page that displays. Enter the **Public API Key** (required for manual entry transactions), in the field provided. You must relaunch the app for the credentials to take effect.

Once the gateway is enabled, it will appear on the **Credit Cards** page



CONFIGURE ROLES

Manual entry card transactions are available on any workstation configured with a Heartland Reader. So merchants have more control over who can perform these transactions, the manual entry function is linked to a permission that can be enabled for specific roles as desired.

- ★ To allow access to manual entry, go to **Settings** and select **Roles**.
- ★ Choose desired role and, on the **Permissions** tab, slide the **Manual credit card entry** toggle to **On** and select **Save**.

Users logged in with this role can now process manually entered card payments.



Heartland

Card Transactions

CREDIT CARD TRANSACTIONS

As with other Heartland Retail platforms, when you are ready to initiate a card payment on an existing ticket, select the **Tender** button and then select **Credit Card > Add Payment**.

- ★ Contactless, EMV, Swipe function the same. [Please note, there is no PIN Debit and there is no mobile functionality.]

MANUAL ENTRY

To initiate a manual entry transaction, from the **Add Payment** window, select **Manual Entry** from the **Payment Mode** dropdown list. The Heartland Reader will prompt the customer to provide their card to the cashier for manual entry. Enter the card information in the fields provided and tap **Submit**. As you enter the card number, the POS will check the entry and inform you if it is invalid.

The image displays three sequential screens from a POS application for card transactions:

- Left Screen:** The "Add Payment" window. It shows the "Credit Card" payment mode selected. Other options like "Cash", "Check", "Gift Card", and "Custom Payment Type" are listed. The "Amount" is set to \$336.00. The "Payment Mode" dropdown shows "Swipe, Chip, Contactless" as the selected option, with "Manual Entry" as an alternative. A note at the bottom states "Balance Due: \$336.00".
- Middle Screen:** A "Credit Card Number" input field. The placeholder text "Credit Card Number *" is visible. The input field is empty.
- Right Screen:** The same "Credit Card Number" input field, but now it contains an invalid card number. An error message "The card number is invalid." is displayed below the input field. The input field is still empty.

Gift Card Transactions

PAYMENTS

- ★ When you are ready to initiate a card payment on an existing ticket, select the **Tender** button and then select **Gift Card > Read from Payment Terminal**.
- ★ After the customer swipes the card, the gift card data (along with its balance) will display on the POS. Enter the desired payment amount and tap **Add Payment**.
- ★ Please note that Heartland Retail does not support gift card payments in excess of the balance due.

LOOKUPS AND ADJUSTMENTS

- ★ To perform a simple lookup, or to adjust a gift card balance, select **Point of Sale** and then select the **Gift Card** button near the top right.
- ★ After the **Gift Card** pop-up displays, you can either enter the gift card number manually in the provided field, or select **Read from Payment Terminal**.
- ★ Once the POS receives the gift card data, the gift card balance will display in a new pop-up.
- ★ The pop-up allows you to add funds, and to view the gift card history.

Rollback Options / Plan

1. Take out the iPad and PAX Payment Device.
 - a. Power them on and make sure both the iPad and PAX device are connected to the same Point of Sale network that Android was running.
2. On the Dashboard screen: click **Settings** and then **Credit Cards** on the left side, next click on your location.
3. Click on **edit on the Heartland Gateway**.
4. Enter your Portico Credentials in the matching sections and click **Save**.
 - a. You will need User Name, Password, Site ID, License ID, and Device ID
 - b. NOTE: Public API Key will not be needed for PAX devices
5. On the POS, **Click the Hamburger Menu** in the top left corner.
6. Click **Settings** on Bottom Left-hand side of the screen.

Rollback Options / Plan Continued

8. In **Settings** Click **Reload Devices**.
9. Click on the **Receipt Printer and Payment Device Drop Down** and select the **correct printer and payment terminal** you intend to use.
 - a. You can **use the IP address** to pick the correct one if you have multiple payment devices.
 - b. The checkmark to the left of the device **determines which device is selected**.
 - c. If you don't see your new device click **Reload Devices** again.
10. Repeat for **Customer Display Device** if you are using **Line Item Display**.
11. **Exit out of the Setting screen**.
 - a. If a checkmark is to the left of the new device you should be able to run transactions on that device now.

Rollback Notes / Lessons Learned

CAVEATS

- ★ When entering Portico Credentials the POS will check to see if they are valid.
 - Please note: **It will generate an error and refuse to save if you are off on one digit.** If you receive an error when entering the PAX Portico credentials, please double check your credentials and try again.
 - **If valid, it will save and not show an error.**
- ★ PAX Portico Credentials will need a **Username, Password, Site ID, License ID, and Device ID.**
 - **Public API Key will not be needed** for PAX devices
- ★ Payment Devices and Printers **MUST be on the same network as the Point of Sale.**
- ★ **If you do not know the IP of the Star Printer:**
 - Turn off the printer and hold down the feed button.
 - While holding down the feed button, turn the printer back on.
 - When you hear a noise from the printer you can let go of the feed button and a chit should print with IP on the bottom of it.

Rollback Notes / Lessons Learned

CAVEATS

- ★ If you **do not know the IP address of the PAX device**, you will have to find it from the device, steps vary by model:
 - **A920/A35**
 - Go to the main Android screen and go to settings.
 - If it asks for a password use pax9876@@.
 - Next, click on wifi, then select your network. The IP should be displayed now.
 - **S300**
 - Hold down the F button and the 1 button at the same time.
 - Next, enter 916860 for the password.
 - Press down till you see **Communications** and select it.
 - Then enter the password again 916860.
 - Press down until you see LAN Parameters.
 - Then Click IP Address and you should see the IP address.
 - Click the Red X button till you get back to the main blue PAX Screen.

Demo Links

Set Up

[POS Settings](#)

[Log In Process](#)

[Pairing a Scanner](#)

Sales

[Completing a Chip Sale](#)

[Completing a Credit Sale](#)

[Completing a Debit Sale](#)

[Completing a Manual Sale](#)

Peripheral Links

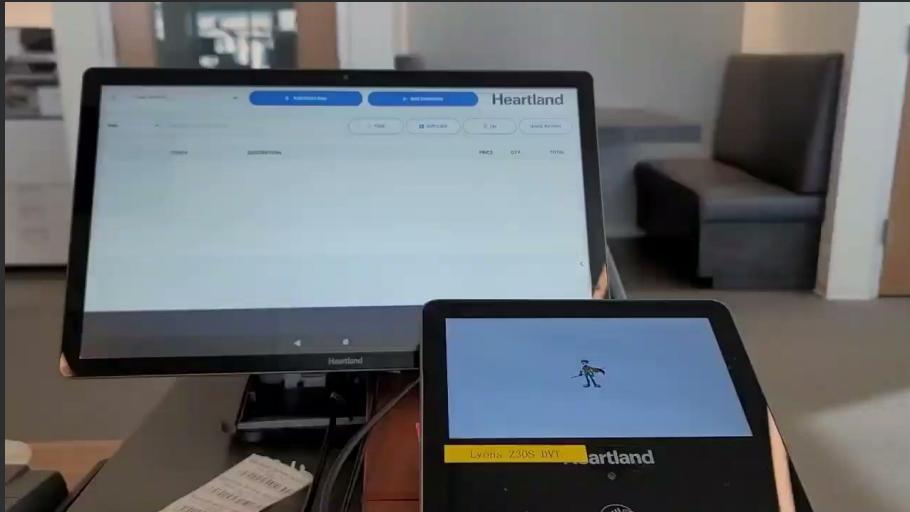
[Bixolon Label Printer](#)

[Star Printer](#)

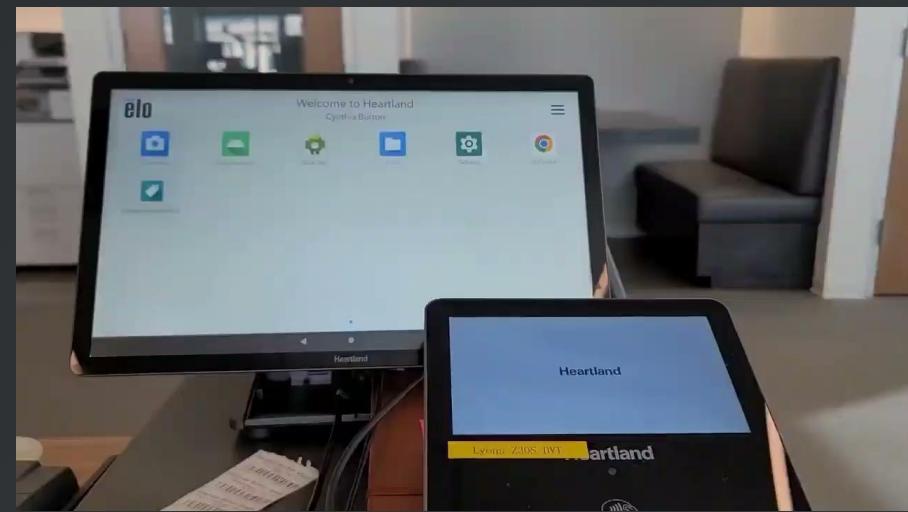
[Star and Bix Ports and Connections](#)

[POS and CFD Ports and Connections](#)

POS Settings

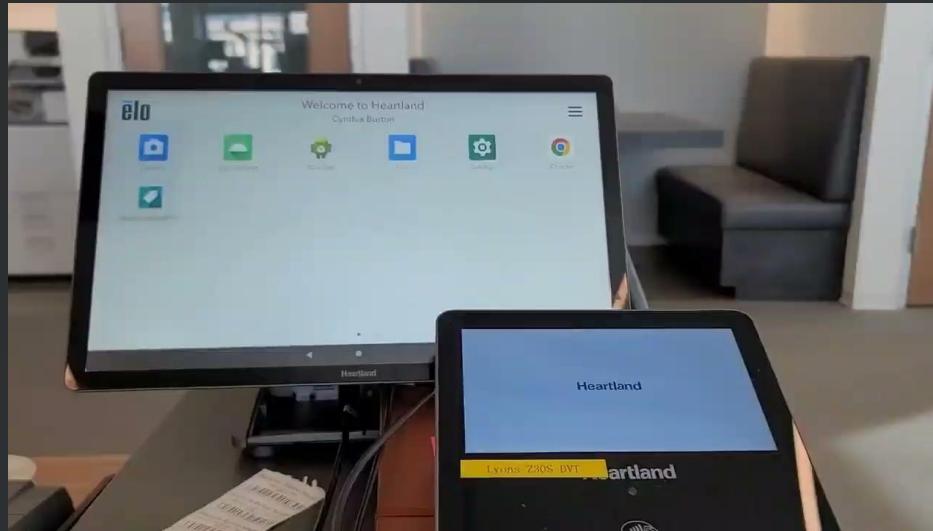


Login Process



Heartland

Pairing a Scanner



Heartland

How to

Setup a Customer using PayApp/Verifone

Boarding for Debit Cards

- ★ **Unlike Pax**, which must be enabled in Landlord, Verifone should to be **set up in OMS/Webtops**.

- If a merchant has enabled PIN Debit, you will see **pricing for debit in OMS**.

- ★ **To enable Pin Debit:**

- The merchant should go through their Sales channel (RM/Dealer/etc) or the portfolio management team.
- The request then **goes to underwriting**.
- The **underwriter adds the pricing** in Client Manager on the account.
 - That **pricing** should be reflected on the **Merchant Updates > Update Pricing/Card Types page**

	Master Card	Visa	Discover	PayPal	AMEX	EBT	Debit
Discount Rate	1.200%	1.200%	1.200%	0.750%	1.200%		
DPI	\$0.0000	\$0.0000	\$0.0000			\$0.0000	
IP Transaction Fee HPSE	\$0.1000	\$0.2000	\$0.1000	\$0.1000	\$0.1000	\$0.1000	\$0.2000
Dial Transaction Fee HPSE	\$0.1000	\$0.2000	\$0.1000	\$0.1000	\$0.1000	\$0.1000	\$0.2000
IP Transaction Fee VNET	\$0.1000	\$0.2000	\$0.1000	\$0.1000	\$0.1000	\$0.1000	\$0.2000
Dial Transaction Fee VNET	\$0.1000	\$0.2000	\$0.1000	\$0.1000	\$0.1000	\$0.1000	\$0.2000

Debit Dial Txn Fee:

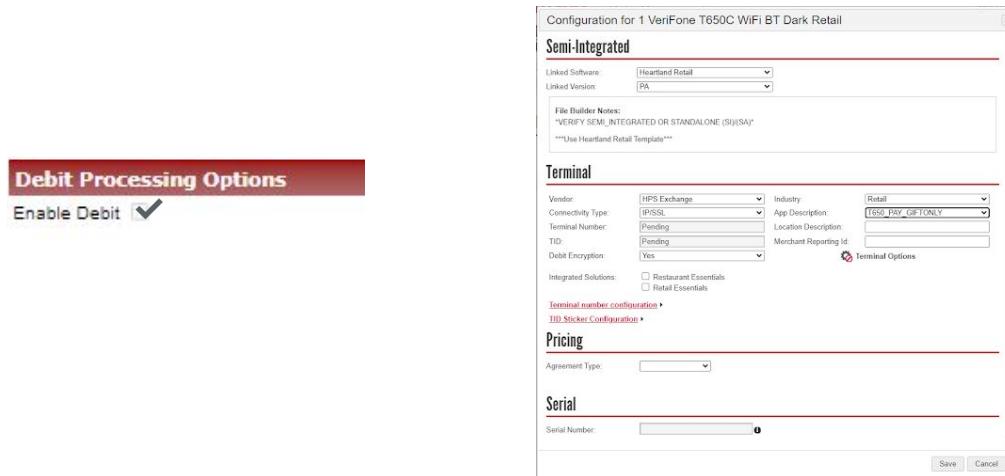
\$0.2000

Debit IP Txn Fee:

\$0.2000

Boarding for Debit Cards Cont.

- ★ Next, in OMS Configuration (before you get to WebTOPs) you would select "**Debit Encryption: Yes**"
- ★ Then, you would have to **select** the appropriate webtop app: **T650_PAY_RTL_PIN_SI**
- ★ In the Webtop itself "**Enable Debit**" needs to be checked.



Configuration for 1 VeriFone T650C WiFi BT Dark Retail

Semi-Integrated

Linked Software: Heartland Retail
Linked Version: PA

File Builder Notes:
"VERIFY SEMI_INTEGRATED OR STANDALONE (SI) (SA)"
"Use Heartland Retail Template***"

Terminal

Vendor: HPS Exchange
Connectivity Type: IPSSL
Terminal Number: Pending
TID: Pending
Debit Encryption: Yes

Industry: Retail
App Description: T650_PAY_RTL_PIN_SI
Location Description:
Merchant Reporting Id:

Integrated Solutions: Restaurant Essentials
 Retail Essentials

Pricing

Agreement Type:

Serial

Serial Number:

Save Cancel

- ★ The Verifone will automatically **run it as pin debit if its enabled and it recognized the card as a debit card.**
 - The customer or merchant won't have to select credit vs debit on the payment device as one would with other payment devices.

Duplicate Checking in PayApp

★ Duplicate Detection:

- On HPA, local **duplicate detection is not supported**. Instead, duplicate detection is performed by the gateway.
- To check for duplicate transactions, portico verifies if the transaction amount, service and card are the same from a previously approved transaction from the same terminal id within a specified time frame.
 - If a previously approved transaction is found, portico returns a Duplicate transaction error.
- If the **HPA duplicate check** supported option is **enabled**, a duplicate confirmation prompt will be displayed on the terminal screen.
 - If the user decides to not resend the transaction, the terminal **cancels the transaction and returns a duplicate transaction** error to the POS. Otherwise, the terminal resends the transaction to the gateway with the duplicate override flag set.
 - ***Cross terminal duplicate checking is not supported. If a transaction is approved on one terminal, and the same transaction with the same card and amount is attempted on another terminal from the same merchant, Portico will not detect the duplicate.***

★ Running the duplicate checking does require that the Duplicate Checking Time is set. To address this, the **template is set for as a default of 10 minutes**.

★ If a duplicate or unresolved payment is discovered, then the system follows the **unresolved manual payment workflow** as seen here:

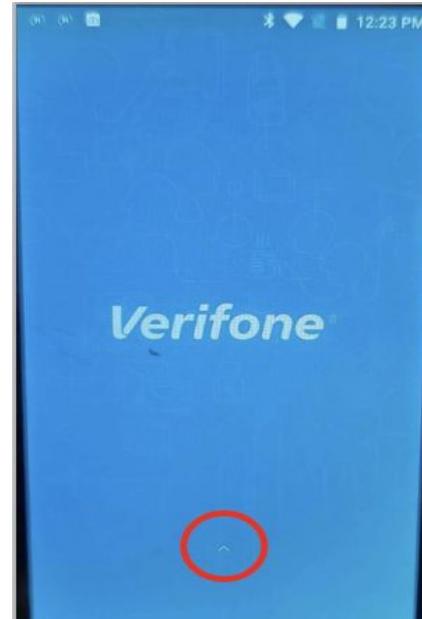
Prerequisites

- ★ Merchants must be running **Heartland Retail version 2024.01.170 or later.**
- ★ Check the **Heartland Pay App** feature flag in Landlord.
- ★ POS and payment **Heartland Pay App** **are the same Wi-Fi network.**
- ★ Payment device **must be running 02.16.00.D**

Verifone Configuration & Guide

VIEW COMMUNICATION & CONNECTION DETAIL

- ★ Select the **Verifone home icon** on the device and it will display the screen pictured here.
- ★ Tap the **^ icon** centered near the bottom of the screen. **This icon is very faint so we have encircled it here for clarity.**
- ★ On the screen that displays, select **Settings > Network & Internet > Wi-Fi**.
- ★ Select the **desired Wi-Fi network and enter credentials to connect.**
 - ***Please ensure that both the POS and device are on the same Wi-Fi network.***
- ★ Once connected, you can view the IP address your Wi-Fi network has assigned to your device.
 - Make a note of this so you can easily identify your device when connecting it to **Retail POS** in **POS Settings**.



[Heartland Pay App Guide](#)

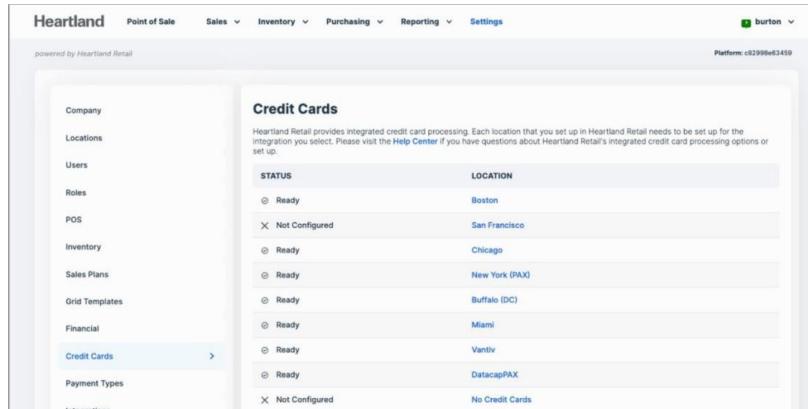
Heartland

POS Configuration | Enabling Gateway

POS CONFIGURATION

Enable the HPA Gateway by following these steps:

1. From the POS, go to **Settings > Credit Cards** and select a location.



Point of Sale Sales Inventory Purchasing Reporting Settings

powered by Heartland Retail Platform: c82990e63450

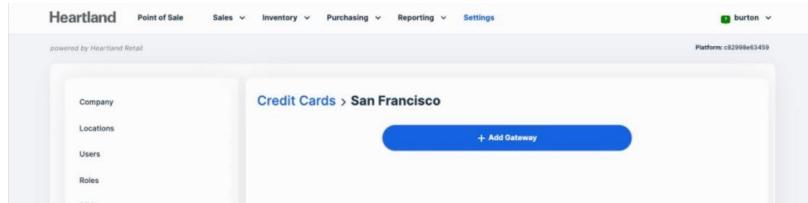
Credit Cards

Heartland Retail provides integrated credit card processing. Each location that you set up in Heartland Retail needs to be set up for the integration you select. Please visit the [Help Center](#) if you have questions about Heartland Retail's integrated credit card processing options or set up.

STATUS	LOCATION
Ready	Boston
Not Configured	San Francisco
Ready	Chicago
Ready	New York (PAX)
Ready	Buffalo (DC)
Ready	Miami
Ready	Vantiv
Ready	DatacapPAX
Not Configured	No Credit Cards

Company Locations Users Roles POS Inventory Sales Plans Grid Templates Financial Credit Cards > Payment Types Integrations

2. Select **Credit Cards** and then select **+Add Gateway**.



Point of Sale Sales Inventory Purchasing Reporting Settings

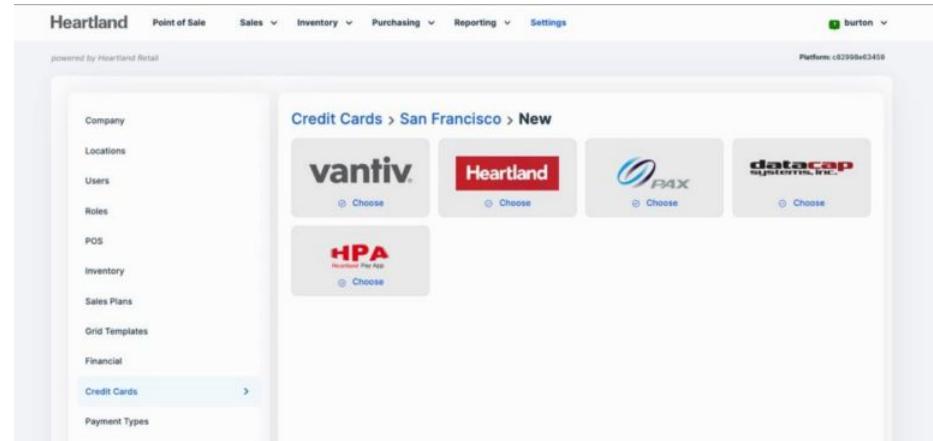
powered by Heartland Retail Platform: c82990e63459

Credit Cards > San Francisco

+ Add Gateway

Company Locations Users Roles

3. Select '**HPA Heartland Pay App**' (other options listed may vary):



Point of Sale Sales Inventory Purchasing Reporting Settings

powered by Heartland Retail Platform: c82990e63450

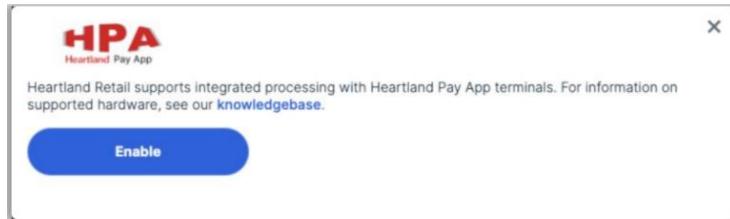
Credit Cards > San Francisco > New

Company Locations Users Roles POS Inventory Sales Plans Grid Templates Financial Credit Cards > Payment Types

vantiv Choose
Heartland Choose
PAX Choose
HPA Choose
Datacap Choose

POS Configuration | Enabling Gateway Cont

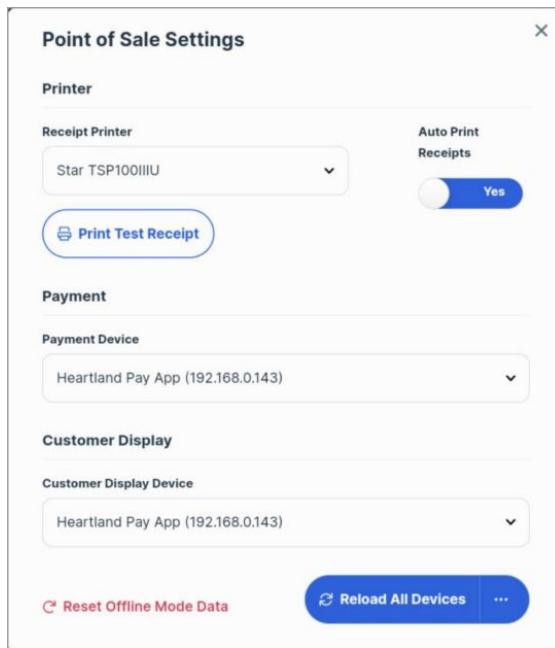
4. On the modal that displays, select **Enable** to add the gateway.



5. Once the gateway is enabled, the system will display a green toast message to that effect and the '**HPA Heartland Pay App**' will then appear on the **Credit Cards** page as pictured here:

POS Configuration | Enabling Gateway Cont

6. To add your device, log into the POS and select a station. Select the hamburger menu button, and then go to **POS Settings**. Select **Reload All Devices** and then select your payment device from the dropdown.



Notes: In the image on the left, the Heartland Pay App is selected for both the **Payment Device** and the **Customer Display Device** fields. We recommend following this example in order to take full advantage of Verifone features such as line item display and digital signature capture.

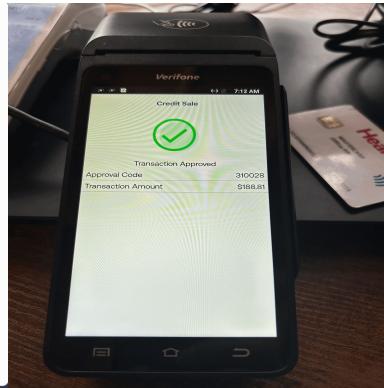
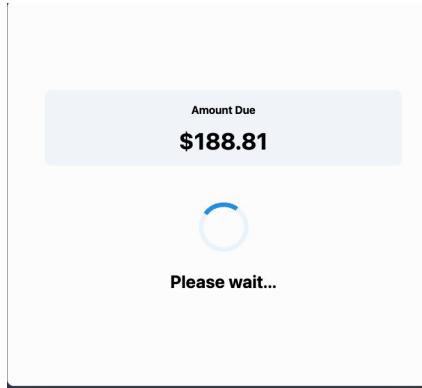
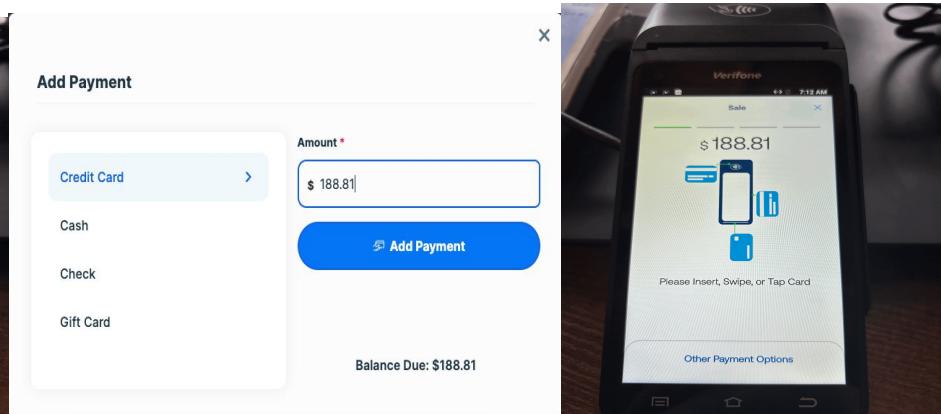
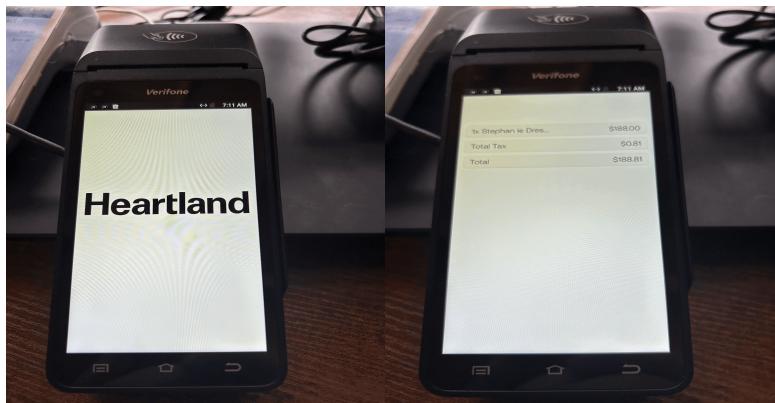
With the HPA Gateway enabled, merchants can process the following transaction types:

- ★ **Credit Sale**
- ★ **Debit Sale**
- ★ **Credit Return**
- ★ **Manual Entry Sale**
- ★ **Swiped MSR Debit Sale**
- ★ **EMV PIN Debit Sale**
- ★ **NFC/Contactless**
- ★ **Manual Batch Close**
- ★ **Heartland Gift Card**

To ensure smooth operations and accurate payment processing, Heartland Retail offers robust built-in reconciliation capabilities for card transactions. This includes automatic reconciliation for all payments processed via Heartland, as well as manual reconciliation functionality.

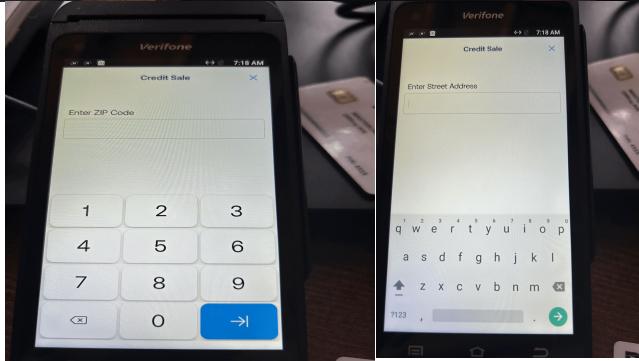
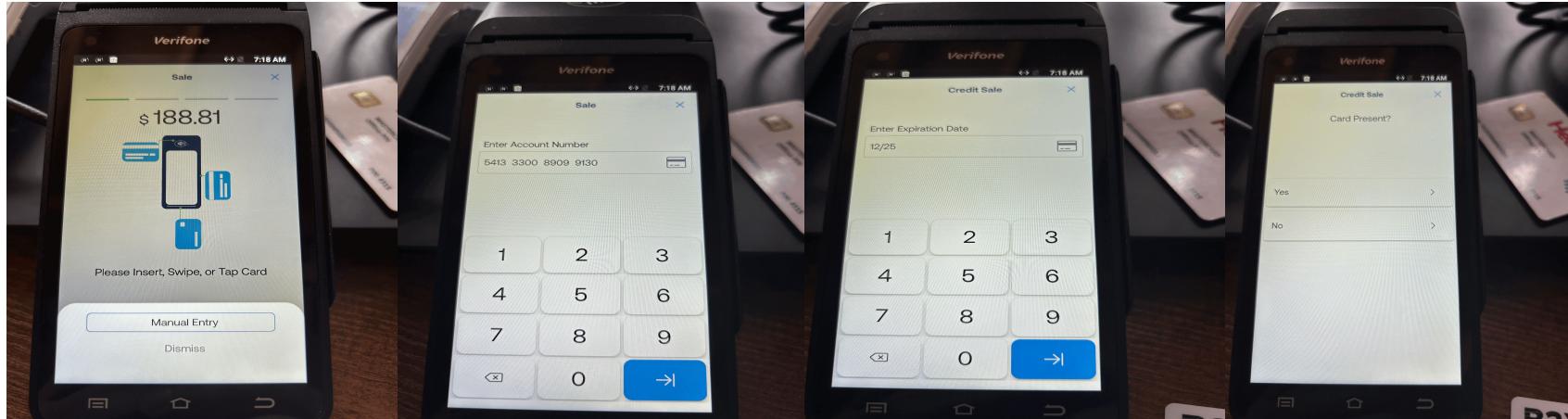
Transaction Flow

CREDIT CARD TRANSACTIONS



Transaction Flow Cont.

CREDIT CARD TRANSACTIONS | MANUAL TRANSACTION



Gift Card Transactions

PAYMENTS

- ★ When you are ready to initiate a card payment on an existing ticket, select the **Tender** button and then select **Gift Card > Read from Payment Terminal**.
- ★ After the customer swipes the card, the gift card data (along with its balance) will display on the POS. Enter the desired payment amount and tap **Add Payment**.
- ★ Please note that Heartland Retail does not support gift card payments in excess of the balance due.

LOOKUPS & ADJUSTMENTS

- ★ To perform a simple lookup, or to adjust a gift card's balance, select **Point of Sale** and then select the **Gift Card** button near the top right.
- ★ After the **Gift Card** pop-up displays, you can either enter the gift card number manually in the provided field, or select **Read from Payment Terminal**.
- ★ Once the POS receives the gift card data, the gift card balance will display in a new pop-up.
- ★ The pop-up allows you to add funds, and to view the gift card history.

Rollback Options / Plan

From Elo and Verifone set up to iPad and PAX set up:

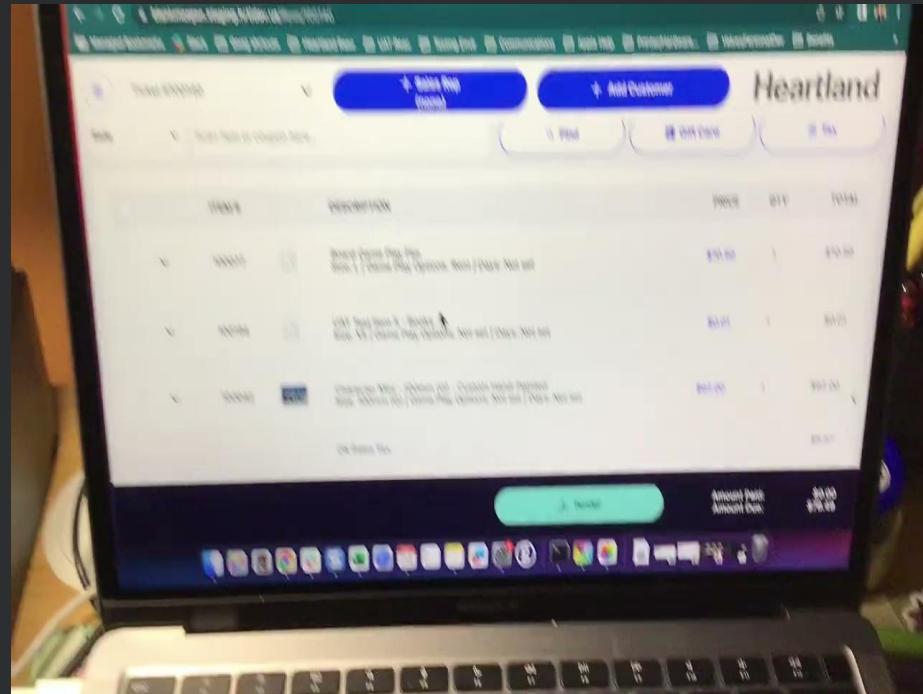
1. Switch out the Verifone with the PAX and get the iPad out.
2. Add Heartland Gateway and re-add PAX credentials (**found in PAX Store**) If not currently there.
3. Go to **POS > POS Settings > Reload Device > Look for the PAX's IP > Select the Pax Device.**
4. Try a test transaction by **creating a new ticket, adding an item, and Tender/add Payment.**
5. The rollback is **successful once the test transaction is successful.**

Rollback Notes / Lessons Learned

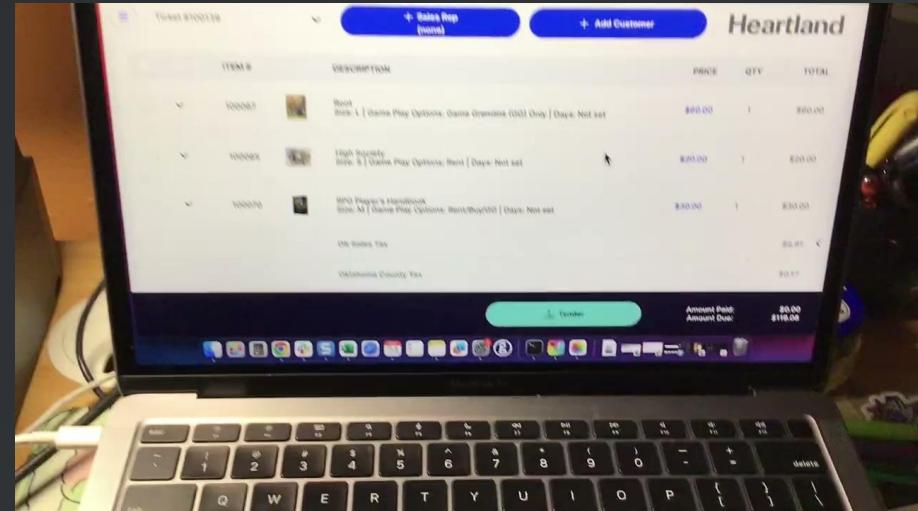
CAVEATS

- ★ The payment device needs to be on the **same network as the Point of Sale**.

Sale - Credit

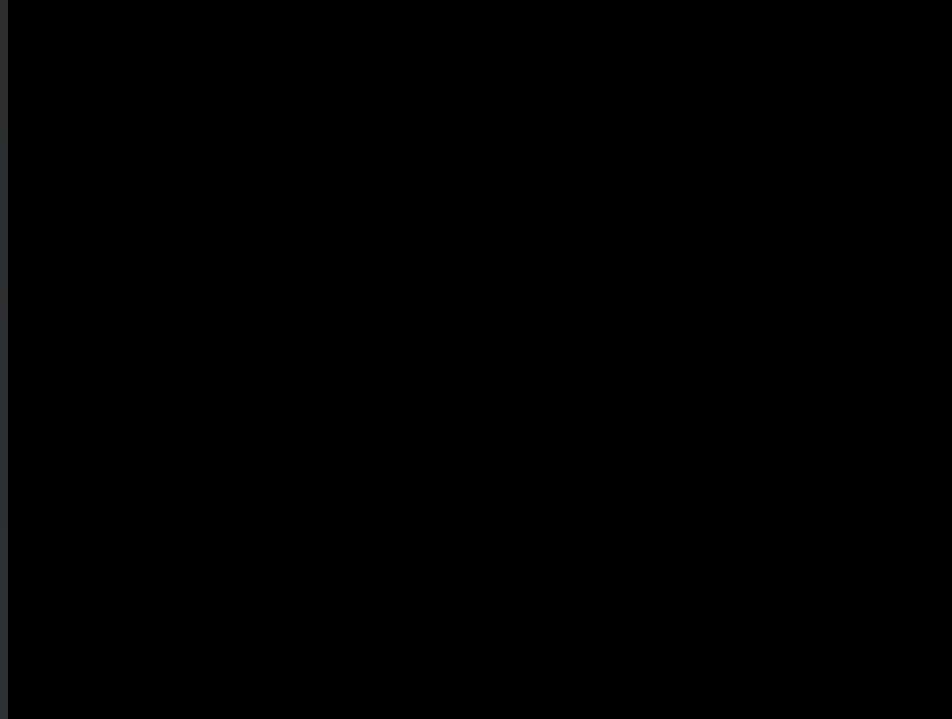


Sale - Debit



Heartland

Manual Sale



Marketing Assets

Marketing Assets

Heartland Point of Sale | Retail

Make every day work better with Heartland Retail POS



Increase revenue, make better decisions and put more money in your pocket with a solution built by retailers, for retailers.

What can Heartland POS do for your retail business?

- Transform retail operations
- Incentivize customers
- Sell anywhere, anytime
- Draw with a curated solution
- “Heartland Retail POS makes running our gift shop a little bit easier every day.” — Dylan Simmons, Keystone Tractor Museum

Learn more at heartland.us/retail

© 2020 Heartland, a Global Payments company. HS.2019-001

Heartland Point of Sale | Retail

Frequently asked questions (FAQs)

What is Heartland Retail?
Designed for small to medium-sized retail stores with single or multiple locations, Heartland Retail Point of Sale is an all-in-one retail business management solution that helps you run and grow your retail business more efficiently. Purpose-built with all the features you need to run and grow your store online, on-premise or on the go — without the need to pay for multiple systems — it delivers an exceptional omnichannel retail experience.

What's new with Heartland Retail?
Heartland Retail is now available on Android, giving you several options for hardware and peripherals. With software updates, including the latest version of the web version, you get a cost-effective solution curated for your unique retail strategy and needs — helping to move you forward.

The new Android stand's customer-facing display guides customers through the payment process with clear, step-by-step instructions. With enhanced functionality, reliability and devices syncing in real time, it gives all users a modern and intuitive retail experience.

Am I required to use Heartland Payments for processing?
Although the Essentials plan is required to process transactions using Heartland Payments, Merchant Pro and Premium plans can be integrated with the third-party processor of your choice.

How many POS stations can I have per location?
You are limited to two POS stations per location store on the Heartland Essentials plan. For more than two stations, and/or for multi-location stores, use the Retail Comprehensive plan.

Which features are included with Essentials vs. Complete plans?
All features are available with both Essentials and Complete — you will not encounter feature limitations based on your chosen plan.

How can I find pricing for Heartland Retail?
Contact your sales rep for a direct quote and to identify the best plan for your unique business needs.

What's included with the Heartland Retail?
Regardless of plan, you have access to 24/7/365 phone support.

Web form support:
heartland.us/resources/customer-support
Phone support:
833.844.4797 (option 1, then option 2)
Email support:
retailsupport@heartland.us

© 2014 Heartland, a Global Payments company. HS.2019-002

Heartland Point of Sale | Retail

A smarter way to run your retail business



Meet your next retail point of sale system

Advanced retail management
Track profitability, detect sales trends and optimize inventory management — all from one screen.

Online shopping Connect your POS to an online shopping experience of your choice using a single platform to manage all your operations.

Customer loyalty and marketing
Turn your customers into advocates by connecting to engage third-party marketing and loyalty programs.

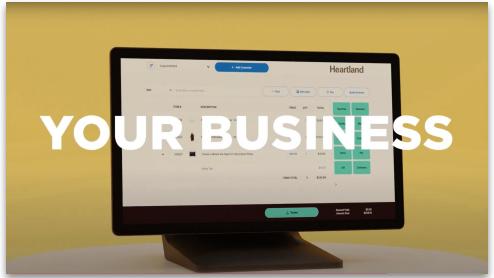
Integrated payments out of the box
Keep the cash flowing with automatic payment processing, faster checkout and accurate bookkeeping.

— Bryan Hyatt, CEO, Merchant Management Group

Top of Funnel One Sheet

FAQ

Product One Sheet



Retail POS YouTube Promo Video

Heartland