

Admin Portal Payment Config To Avoid Rejected Transactions

Best Practices

Heartland Restaurant Point of Sale

November 2024

PURPOSE

This document should serve as a guide on where to enter what specific information into the HRPOS Admin Portal to ensure merchant transactions are reported correctly.

Portico Gateway Parameter Email

When a "file is built" within Heartland's Equipment screen (a.k.a. OMS, or, Order Management System), any "file" that is built for the Portico Gateway will create a boarding email that looks similar to the below image.

Be aware that there should always be two (2) "files built" by Heartland to be used in the Admin Portal.

- A. One (1) for use in the **Heartland In-Store Settings** section. The "shared" device ID.
- B. One (1) for the **Online Settings** section.

In this example, a Shared Device, In-Store file was built and this parameter email was generated as a result.

This email contains what is commonly referred to as "Five (5) Part Credentials" containing the **License (Client) ID**, **Device ID**, **Site ID**, **Software User ID**, and **Software User Password**.

From: HPOS SIP Support <hpossipsupport@heartland.us>
Date: Monday, November 25, 2024 at 1:36:15 PM UTC-5
Subject: Location Name and MID will be here
To: HPOS SIP Support <hpossipsupport@heartland.us>
Cc: dealer.email@address.com hposgatewaycredentials@e-hps.com <hposgatewaycredentials@e-hps.com>

Location Information will be found here

Please configure your software with the following information:

License ID:
Site ID:
Device ID:
Username:
Password:

This Shared device ID is to be used for Heartland In-Store and Monetary settings **ONLY**.

Admin Portal Online Settings

When a HRPOS Online Ordering file is built by the Secure Submit team, the parameter email will be in a similar format to the image above.

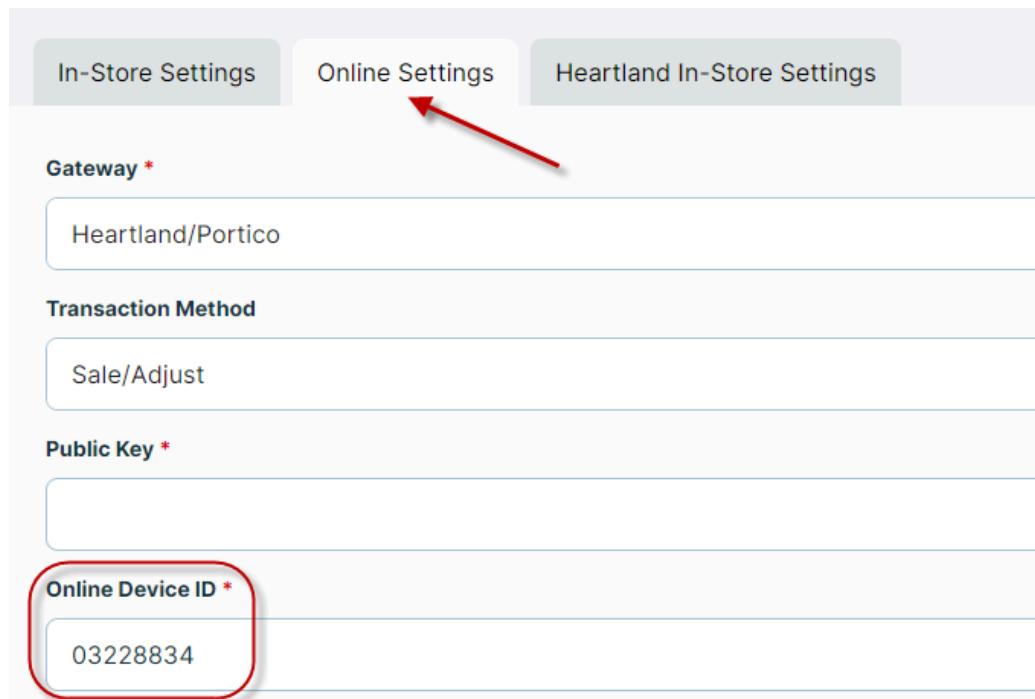
The difference in the Online Settings boarding email is that it will **not** contain License, Site, Username, or Password credentials.

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Take specific note of the Terminal number (the "Device ID", a.k.a. TID). This is the number that **MUST** be used in the HRPOS Admin portal when In Location Setup → Payment Gateway → Online Settings.

Do NOT use Monetary in this setting for any reason. Only use Heartland / Portico for the gateway.

Only the Secure Submit / Online Ordering Device ID and the Public Key included in the boarding email must be used when entering information into the Online Settings portion of the Admin Portal. **Do not use any other Device ID** as this can result in detrimental recourse to the merchant. Such as, but not limited to, the merchant receiving additional fees or payments being rejected back to the merchant.



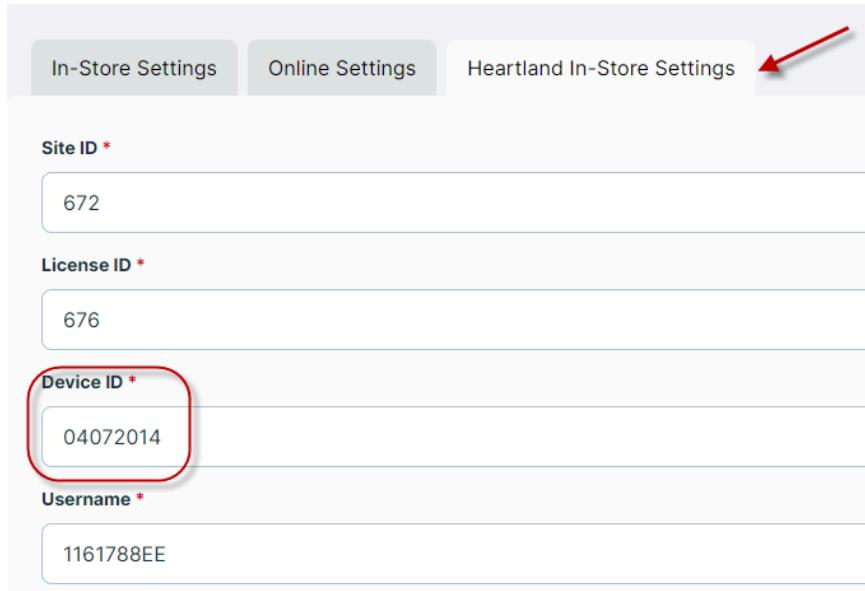
The screenshot shows a user interface for 'Online Settings'. At the top, there are three tabs: 'In-Store Settings', 'Online Settings' (which is highlighted in blue and has a red arrow pointing to it), and 'Heartland In-Store Settings'. Below the tabs, there are several input fields:

- Gateway ***: A dropdown menu showing 'Heartland/Portico'.
- Transaction Method**: A dropdown menu showing 'Sale/Adjust'.
- Public Key ***: An empty text input field.
- Online Device ID ***: An input field containing '03228834', which is enclosed in a red rounded rectangle.

Heartland In-Store Settings

When the "Shared Device ID" file is built in Heartland's "equipment screen", a gateway parameter email is not, generally, sent to anyone other than a default inbox and the dealership email listed in the order form used.

However, this doesn't change the fact that the "Five (5) Part Credentials" must still be entered into the Admin Portal under the Location Setup → Payment Gateway → Heartland In-Store Settings.



The screenshot shows the "Heartland In-Store Settings" tab selected in a navigation bar. Below are five input fields:

- Site ID ***: 672
- License ID ***: 676
- Device ID ***: 04072014 (This field is highlighted with a red box and a red arrow points to it from the top right.)
- Username ***: 1161788EE
- Password ***: (Field is not visible in the screenshot)

Similar to Online Settings, only the "Shared Device ID" (i.e. the master TID) for "In-Store" must be used in these fields.

Additionally, if the gateway in the "In-Store Settings" tab is set to Monetary instead of None, then the "Device ID" in the "Monetary Settings" tab must match the "Shared Device ID".

- Note: There are Zero (0) circumstances where the Online Ordering (Secure Submit) "Device ID" can, or should, be used in the Monetary Settings. Doing so will cause the merchant to experience Non-EMV fees and rejected transactions after settlement.**