

# Shift4 Interface & Shift4 i4Go Setup

Shift4 is a payment processing solution for independent hotels and chains. With an interface connected to RoomKeyPMS, hoteliers can take advantage of the following Shift4 offerings:

- Streamlined payment processing and authorization directly in RoomKeyPMS
- Reliable payment security, including EMV, PCI-validated point-to-point encryption (P2PE), and tokenization
- Lighthouse Transaction Manager (formally Dollars-on-the-Net)

Once you have setup your Shift4 Interface, [CLICK HERE for How to Setup a Shift4 i4Go Interface](#) which allows you to support the following enhanced functions:

- Automatically process advanced deposits for reservations that are made via eRes Booking Engine
- Collect guest credit card information during Mobile Check-In, and automatically process guest credit card(s) during Mobile Check-Out

## STEP #1 Contact Shift4 to Setup or Modify an Account

The purpose of this first step is to generate a Customer Configuration Report that is sent to the RoomKeyPMS Interface Specialist. This report will contain the following required information:

- Shift4 Merchant ID
- API Serial #
- API Password

If Shift4 sends the Customer Configuration Report to you directly, please forward it to the RoomKeyPMS Interface Specialist BEFORE your scheduled Testing/Installation Date.

**Click below for more information:**

## To Setup a New Shift4 Account

- **Contact** Shift4 to create an Account
  - [CLICK HERE to access and complete the Shift4 Payments GET STARTED Form](#)
  - During sign up, advise that you will be using RoomKeyPMS as your PMS provider

- **Provide** your Merchant Bank (or Merchant Processor) Information, as well as pin-pad device (or EMV terminal) information
- **Request** a Testing/Installation Date to be scheduled on the same day as your RoomKeyPMS Cutover/Go-Live date
  - If you are already using RoomKeyPMS, ask your Shift4 account manager to confirm when they will schedule the Testing/Installation Date

 Ask for an **i4Go Account** in addition to a standard Shift4 Payments Account if you want to automatically take advance deposits for reservations made online via eRes Booking Engine; or if you want to use Mobile Check-In/Out to collect and process guest credit cards automatically.

## To Modify an Existing Shift4 Account

- **Contact** your Shift4 account manager via email: **myaccount@shift4.com** and advise that you will be changing your PMS provider to RoomKeyPMS
  - [CLICK HERE for information on contacting Shift4 to schedule or reinstall your Shift4 software](#)
- **Review** your Merchant Bank (or Merchant Processor) Information, as well as pin-pad device (or EMV terminal) information
  - If you are changing your merchant bank information, or adding/removing devices, please advise your Shift4 account manager
- **Request** a Testing/Installation Date to be scheduled on the same day as your RoomKeyPMS Cutover/Go-Live date
  - If you are already using RoomKeyPMS, ask your Shift4 account manager to confirm when they will schedule the Testing/Installation Date

 Determine if you have an **i4Go Account** in addition to a standard Shift4 Payments Account if you want to automatically take advance deposits for reservations made online via eRes Booking Engine; or if you want to use Mobile Check-In/Out to collect and process guest credit cards automatically.

## STEP #2 Confirm Shift4 Installation Date with RoomKeyPMS Interface Specialist

The purpose of this step is to confirm the date and time of the Shift4 Testing/Installation Date with the RoomKeyPMS Interface Specialist. This date is scheduled by Shift4 and it can take up to

4 weeks to complete the sign-up process. Once you receive an email from Shift4 regarding your Installation Date, please forward it to the RoomKeyPMS Interface Specialist and [support@roomkeypms.com](mailto:support@roomkeypms.com).

**⚠** If your Installation Date is scheduled after your RoomKeyPMS Cutover/Go-Live, or otherwise leaves you to operate your hotel without an active credit card interface; then you must find a way to manually process credit cards until such time that your Shift4 Interface is installed & tested. The following options are available:

- **Use a standalone terminal** (pin-pad device, or EMV terminal) to process credit cards manually, and then record the payment in RoomKeyPMS using the AUTH code field
- **Ask your Shift4 account manager for access to [Lighthouse Transaction Manager \(formally Dollars-on-the-Net\)](#)** to process credit cards manually, and then record the payment in RoomKeyPMS using the AUTH code field

## STEP #3 Testing and Installation: Conference Call(s) with Shift4 and RoomKeyPMS Interface Specialists

The purpose of this step is to complete the Shift4 UTG Installation with the Shift4 Interface Specialist, and then complete Shift4 Interface Installation & Testing with the RoomKeyPMS Interface Specialist. This may be completed in one conference call, or it may be separated into two calls; however the Shift4 UTG Installation must be completed first before the Shift4 Interface Installation & Testing can be completed with the RoomKeyPMS Interface Specialist.

**Click below for more information:**

### Shift4 UTG Installation

A Shift4 Interface Specialist will install a [Shift4 UTG \(Universal Transaction Gateway\)](#) in one of the following configuration methods:

- **UTG Installation on one computer** (ie: Interface Computer)
  - The Shift4 Interface Specialist will need remote access to this computer for the purpose of installing the UTG
  - If your Staff share a generic Windows Login, this configuration method may be used
- **UTG Installation on each computer used to process credit cards** (Recommended)
  - The Shift4 Interface Specialist will need remote access to each of these computers for the purpose of installing the UTG
  - If your Staff each have their own Windows Login, this is the required configuration method

# Shift4 Interface Installation & Testing

A RoomKeyPMS Interface Specialist will complete the following:

1. Retrieve Computer IP Address(es)
  - If the UTG has been installed on one computer, the RoomKeyPMS Interface Specialist will need remote access to this computer
  - If the UTG has been installed on each computer used to process credit cards, the RoomKeyPMS Interface Specialist will need remote access to each of these computers
2. Add the Shift4 UTG and RoomKeyPMS applications to the Windows Firewall Exceptions List and Antivirus Exception List(s)
3. Add the Computer IP Address(es) to the Registry Settings
4. Activate the OLP Tab in RoomKeyPMS
5. Test the Shift4 Interface by using RoomKeyPMS to process a credit card payment and refund

 If your Staff each have their own Windows Login, and the Shift4 UTG has been installed on each computer used to process credit cards, Step 4 must be repeated for each Windows Login on each computer.

For example: if you have 4 Front Desk Staff and 2 Front Desk computers used to process credit cards - the OLP Tab will need to be activated a total of 8 times (1 time on each computer for each Windows Login)

## How to Setup a Shift4 i4Go Interface

Shift4 i4Go is an iFrame that supports enhanced credit card processing functions used with RoomKeyPMS's eRes Booking Engine and Mobile. With a Shift4 i4Go Interface connected to RoomKeyPMS, hoteliers can take advantage of the following enhanced functions:

- Automatically process advanced deposits for reservations that are made via eRes Booking Engine
- Collect guest credit card information during Mobile Check-In, and automatically process guest credit card(s) during Mobile Check-Out

 A standard Shift4 Payments Account is required to proceed; you can ask for an Shift4 i4Go Account when [setting up a new Shift4 Account](#). If you already have a Shift4 Payments Account, you can contact your Shift4 account manager via email: [myaccount@shift4.com](mailto:myaccount@shift4.com) to request an i4Go Account and Access Token.

**Click below for more information:**

## To Setup a New Shift4 i4Go Account

The purpose of the following steps is to request an i4Go Account and retrieve an Access Token and send this information, along with the i4Go Account Number to RoomKeyPMS Customer Support via email: [support@roomkeypms.com](mailto:support@roomkeypms.com).

1. Contact your Shift4 account manager via email: [myaccount@shift4.com](mailto:myaccount@shift4.com) and request an **i4Go Account**
2. Complete the i4Go Account setup process with your Shift4 account manager
  - Request an **i4Go Access Token**, or follow the steps [to modify an existing Shift4 i4Go Account](#) to retrieve an i4Go Access Token
3. Copy the **Access Token** (alphanumeric code) and the i4Go **Account Number** into an email to our support team: **[support@roomkeypms.com](mailto:support@roomkeypms.com)**

## To Modify an Existing Shift4 i4Go Account

The purpose of the following steps is to retrieve an i4Go Access Token and send this information, along with the i4Go Account Number to RoomKeyPMS Customer Support via email: [support@roomkeypms.com](mailto:support@roomkeypms.com)

1. [Log into Lighthouse Transaction Manager \(formally Dollars on the Net\)](#)
2. From the menu, select **Settings > API Settings**
3. On the API Settings page, click the **+** button at the bottom-left of the table to begin the i4Go Access Token creation process
4. On the Manually Create API Credential screen, from the Vendor list, select **Shift4 Corporation**
5. From the Application list, select **i4Go**
6. From the Merchant Selection area, select the merchant that will be using the token. Note: Typically, this is the merchant used for e-commerce or central use/fulfillment
7. From the API Type section, select **Standard (dual purpose, API & i4Go)**. Select "**API Only (Access Token)**" and select the token to be valid for **30 days**. NOTE: Once we've entered token into the PPM it then has no expiry - the 30 day "valid" date is just how long we have to enter it into our system before it expires
8. Click **Submit**
9. The View/Edit API Credential screen will display, please copy the **Access Token** (alphanumeric code) and the i4Go **Account Number** into an email to our support team: **[support@roomkeypms.com](mailto:support@roomkeypms.com)**