Heartland Payment Systems Interface Setup

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

- Streamlined payment processing and authorization directly in RoomKeyPMS
- Heartland Secure^{TM} payment security, including EMV, PCI-validated point-to-point encryption (P2PE), and tokenization

⚠️ Please note that we do not support Terminal Settle as RoomKeyPMS does not trigger an automatic batch settlement sequence with Heartland. Please review this with Heartland so that they can set your property up to do its own nightly batch outs.

STEP #1 Contact Heartland 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:

- Heartland License ID
- Heartland Site ID
- Device ID
- Heartland Software Username
- Heartland Password

If Heartland 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 Heartland Account

- **Contact** Heartland Payment Systems to create an Account
  - CLICK HERE to access and complete the Heartland Payment Systems Contact Sales form
  - During sign up, state that your Product of Interest is Payment Processing, and 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

- Tokenization must be enabled on your EMV devices in order for them to work with our Interface
- EMV devices must be connected via ethernet cable to an available LAN port on the same network as the computer it is being plugged into. Please ensure you have someone available to assist you with this if you are not familiar with these terms; we unfortunately do not know your network nor your setup so would be unable to guide you through this process

- **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 Heartland account manager to confirm when they will schedule the Testing/Installation Date

To Modify an Existing Heartland Account

- **Contact** your Heartland account manager and advise that you will be changing your PMS provider to RoomKeyPMS
  - [CLICK HERE for information on contacting Heartland Payment Systems Support](#)

- **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 Heartland account manager
  - Tokenization must be enabled on your EMV devices in order for them to work with our Interface
  - EMV devices must be connected via ethernet cable to an available LAN port on the same network as the computer it is being plugged into. Please ensure you have someone available to assist you with this if you are not familiar with these terms; we unfortunately do not know your network nor your setup so would be unable to guide you through this process

- **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 Heartland account manager to confirm when they will schedule the Testing/Installation Date

STEP #2 Confirm Heartland Installation Date with RoomKeyPMS Interface Specialist

The purpose of this step is to confirm the date and time of the Heartland Payment Systems Testing/Installation Date with the RoomKeyPMS Interface Specialist. Once you receive an email from Heartland regarding your Installation Date, please forward it to the RoomKeyPMS Interface Specialist and **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 Heartland Payment Systems Interface is installed & tested. The following options are available:
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> - **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 Heartland account manager for access to [MyHeartland](#)** portal 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 Heartland and RoomKeyPMS Interface Specialists

The purpose of this step is to complete the Heartland UTG Installation with the Heartland Interface Specialist, and then complete Heartland 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 Heartland UTG Installation must be completed first before the Heartland Interface Installation & Testing can be completed with the RoomKeyPMS Interface Specialist.

Click below for more information:

Heartland UTG Installation

A Heartland Interface Specialist will install a Heartland UTG (Universal Transaction Gateway) in one of the following configuration methods:

- **UTG Installation on one computer** (ie: Interface Computer)
  - The Heartland 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 Heartland 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

Heartland 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 Heartland 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 Heartland Interface by using RoomKeyPMS to process a credit card payment and refund

> ⚠ If your Staff each have their own Windows Login, and the Heartland 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)