

Heartland

Restaurant

Bridgepay Boarding Portal Guide

Rev. 5/2019

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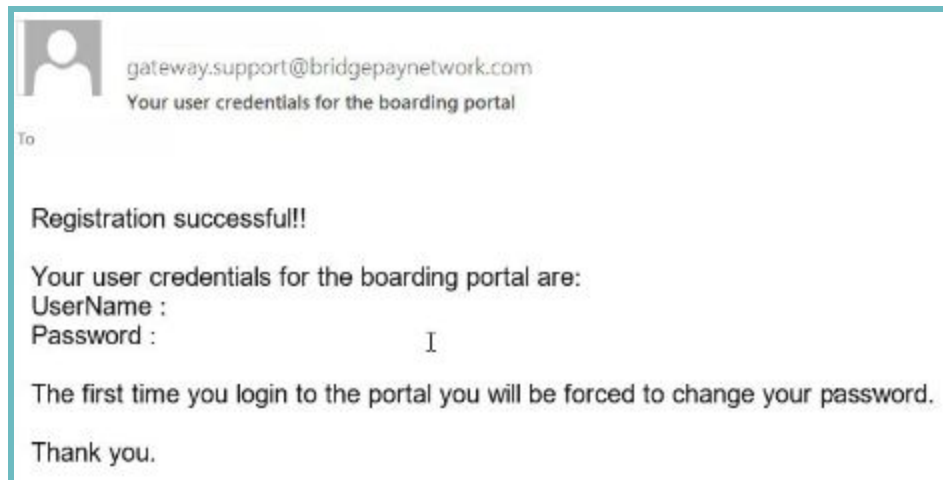
Important Note: Parameters and other identifying information throughout the document may be excluded from screenshots. What some screenshots show may slightly vary from what you will see as a dealer.

Overview

This document will detail how to generally use and board merchants through the Bridgepay Boarding Portal.

Welcome Email

1. When your user is created you will receive a **Welcome Email** with credentials to the Portal.



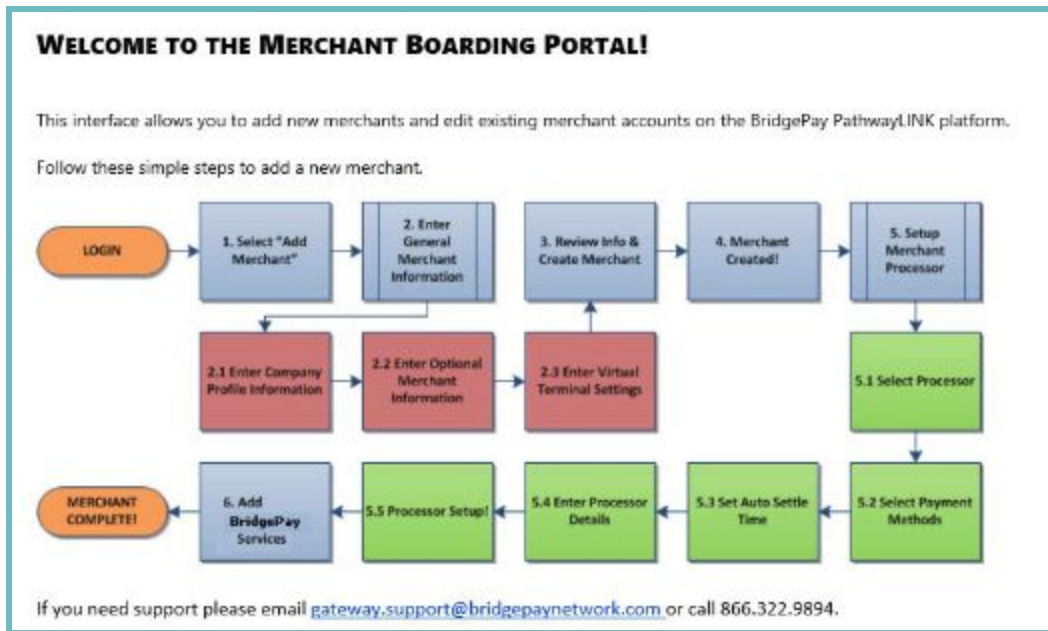
Logging Into the Portal

1. Navigate to <https://boarding.itstgate.com/>.
2. Select **Log In** at the top right of the landing page.



3. Enter your **Username** and **Password**. Select **Log In** at the bottom right.

- Once you are logged in successfully you will come to the **Welcome to the Portal** page.



Changing Password

- It is highly recommended that you change your password once you first log into the portal.
- To do so, select the **User** dropdown. Then select **Change Password**.



3. On the next screen enter your old Password in the **Password** box and the New Password in the **New Password** and **Confirm New Password** boxes.
 - a. Password Requirements
 - i. 8 characters total with a special character.
 - ii. No numeric or case requirement.
4. Select **Change Password** when done.



Creating Dealer Users for the Portal

1. To create another **Dealer User** select the **User** dropdown. Then select **Create User**.



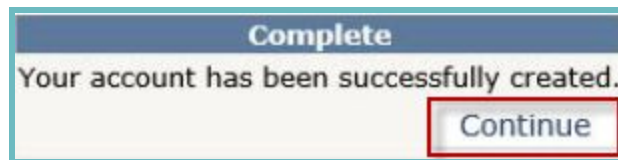
5. In the following screen enter the **Username**, **Password**(make sure to enter in the **Confirm Password** field as well), and **Email Address** of the new **User**.
6. When done, select **Create User** at the bottom right.



7. Under **Assign Roles** select **admin**.
 - a. **boardingrep** will **never** be used.
8. Select **Next** at the bottom right.

The screenshot shows a web form with two main sections. The top section, titled "PartnerType", contains three dropdown menus: "Select Partner Type" (with a "select" placeholder), "Select Partner" (with "T-Gate Help Desks" selected), and "Select Agent" (with "T-Gate Service Desk" selected). The bottom section, titled "Assign Roles", has the instruction "Select the roles you want to apply :". Below this are three radio button options: "admin" (which is selected and highlighted with a red box), "boardingrep", and "system admin". A "Next" button is located in the bottom right corner of the form, also highlighted with a red box.

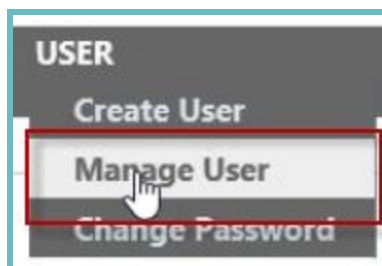
9. If the user was successfully created you will see this message. Simply press **Continue**.



10. The dealer will get a **Welcome Email** with credentials for the portal. See this [section](#) for an example of what the email looks like.

Managing Users for the Portal

1. Changes can be made to an existing portal user by selecting the **User** dropdown and then selecting **Manage User**.



2. On the next screen you will see a list of users with an option to **Edit**, the **User Name**, and the **Last Activity Date**.
a. **Note:** the last page will have the most recently added users.

Agents : T-Gate Service Desk ▾

Click on the "Edit" link next to a user to edit/update that user's information.

	User Name	Last Activity Date
Edit	lynns	3/18/2019 7:30:03 PM
Edit	peteh	3/8/2019 7:50:24 PM
Edit	cgenchi1	3/20/2019 1:28:11 PM
Edit	danatest	4/20/2018 1:25:46 PM
Edit	danademofake	3/20/2019 4:08:50 PM

1 2 3 4 5 6

- Once you select **Edit** next to the appropriate User you will be brought to a new screen with various options you can choose from

EDIT BOX

To update the values below, replace the values in the textbox and click on the "Change/Update" link to be updated.

[Delete User](#)

User Name :
User created on : 3/20/2019 4:08:50 PM

Is User Account Locked Out?
 [Unlock User](#)

Email Address
 [change](#)

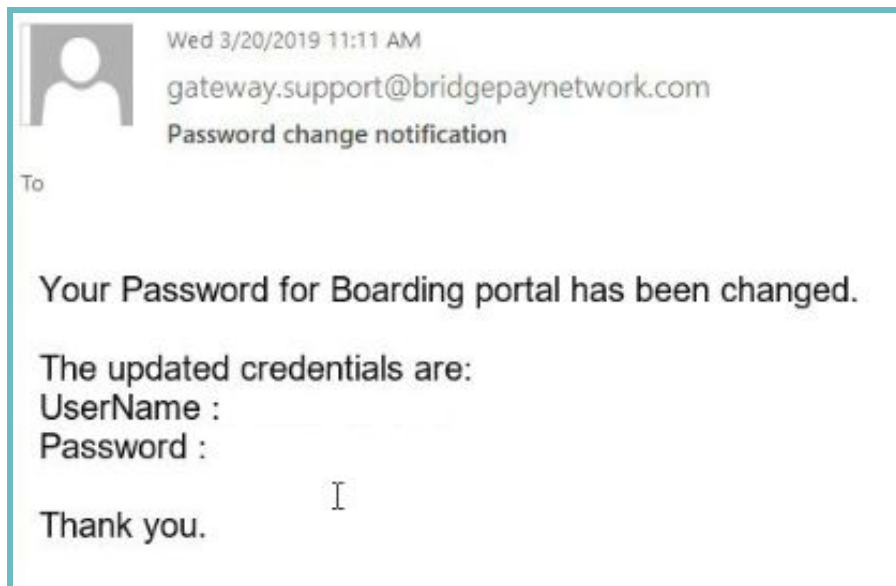
Password
Password: [update](#)

Password Last Changed on: 3/20/2019 4:08:50 PM

[User Unlocked!!](#)

[Done](#)

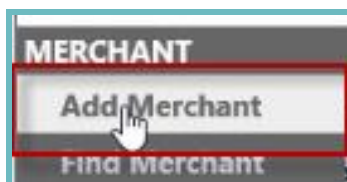
- a. You can delete the User by selecting **Delete User** at the top right.
- b. If the User Account was Locked Out due to too many Log in attempts you can unlock them by selecting **Unlock User**.
 - i. A message at the bottom left will show **User Unlocked!** In green if successful.
- c. You can change the Email Address by entering the new address and then selecting **Change** to the right of the **Email Address** box.
 - i. A message at the bottom left will show **Email Address Updated Successfully!**
- d. You can change the Password by entering the new password and selecting **Update** to the right of the **Password** box.
 - i. **Note:** If you change a user's password they will receive an email letting them know the new credentials.



- ii. A message at the bottom left will show **Password Updated Successfully!**
- e. When finished making changes select **Done** at the bottom middle.

Boarding a New Merchant

1. To start the process of boarding a new merchant select the **Merchant** dropdown and select **Add Merchant**.



General Information

2. The first screen that appears is the **General Information** tab. This is where you will enter the following information:
 - a. **Location ID:** Do not change.
 - b. **Company Name:** Enter the name of the merchant's business.
 - c. **First Name:** Enter the first name of the merchant.
 - d. **Last name:** Enter the last name of the merchant.
 - f. **Day Phone:** Enter the merchant's phone number.
 - i. **Note:** The phone number must be entered in an 123-345-6789 format.
 - g. **Time Zone:** Select the correct time zone of the merchant.
 - i. Selecting the right time zone is **imperative** since it will affect the time of backup auto-settlement configured later on.
 - h. **Email:** Enter the email address of the merchant.
 - i. **Address 1:** Enter the merchant's address.
 - j. **Address 2:** Enter the merchant's second address if applicable.
 - k. **City:** Select the merchant's City.
 - l. **State:** Select the merchant's State.
 - m. **Postal Code:** Enter the merchant's 5-digit ZIP Code.
 - n. **Country:** Enter the merchant's Country.
3. Select the red **Next** button at the bottom right when done.

1. General Information | 2. Virtual Terminal Settings | 3. Payment Information | 4. Scheduled Fees | 5. PathwayLINK Information

* Indicates Mandatory field.

Company Profile

Partner Key:	111	Agent:	T-Gate Service Desk
Partner Name:	T-Gate Help Desks	Confirm Location ID:	0
Location ID:	0	2. Time Zone:	Central Time Zone
1. Company Name:	HRT Agent POS	4. Last Name:	Wayne
3. First Name:	Dana	6. Email:	dana@danadana.com
5. Day Phone:	111-111-1111	8. Address 2:	
7. Address 1:	123 Main St	10. State:	Illinois
9. City:	Chicago	12. Country:	United States
11. Postal Code:	60661		

Optional Information Show Details...

Next ->

Virtual Terminal Settings

- 4. The settings on this screen are defaulted for a restaurant. In most cases they should not need to be changed
 - a. As an example of a potential change on this screen is if it is a restaurant that will not take any tips **at all**. To accommodate this, you would change **Virtual Terminal Tip Amount** to **False**.
- 5. Select the red **Next** button at the bottom right when done.

Board New Merchant

Complete all fields below to set up the merchant.

1. General Information | **2. Virtual Terminal Settings** | 3. Payment Information | 4. Scheduled Fees | 5. PathwayLINK Information

Email Notification of Settlement:	True	Receipt/Signature Capture:	True
Check Image Capture:	True	ForceDuplicate:	False
Invoice used for Force Duplicate?:	False	Require original PRef:	True
Require Invoice Number?:	False	Require Level II Data?:	False
Virtual Terminal Credit Card Refunds:	True	Virtual Terminal Tax Amount:	False
Virtual Terminal Tip Amount:	True	Virtual Terminal Convenience Amount:	False
Virtual Terminal Shipping Amount:	False	Allow Repeat Sale Transactions:	True
Virtual Terminal Commercial Card:	False	Virtual Terminal Recurring Billing:	False
Can Access the Debit Bin Management API:	False	Can E-mail transaction receipts to customers:	True

Next ->

Scheduled Fees

- 6. In this screen, you will not want to change what is in the **Select a fee** dropdown for normal merchants.

1. General Information | 2. Virtual Terminal Settings | 3. Payment Information | **4. Scheduled Fees** | 5. PathwayLINK Information

Scheduled Fees

1. Select a fee profile to be applied to this merchant: defaultbuyrate

- 7. Scroll down and select the red **Next** button in the bottom right when done.



Retrieving Bridgepay Credentials

- 8. On this screen you will see the PathwayLink Account Info.
- 9. Ensure **Auto Generate Account Credentials** is selected.
- 10. Select **Create Merchant** when done.
- 11. This will take you to the **Merchant Successfully Created!** Screen.
- 12. Note down the **User Name**, **Password**, and **Merchant Key** denoted at the top. Provide this to the dealer to put into they Payment Gateway Settings for Heartland Restaurant.

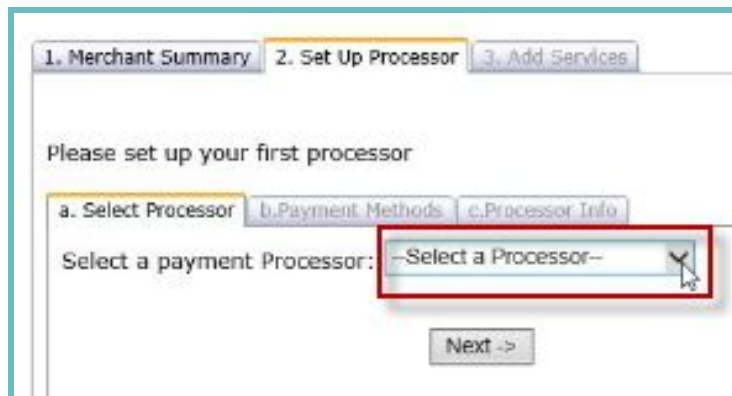


- 13. From here scroll to the bottom and verify all information is correct. You can select **Edit** out to the right of each section to make modifications if needed.
- 14. When done select the red **Next** button at the bottom right.



Setting up the Processor

- 15. Now you will set up the specific processor the merchant will be using through the Bridgepay Gateway.
- 16. Select the desired processor from the **Select a payment Processor:** dropdown. Then select **Next**.



17. In the next screen check all the desired **payment methods** for the processor. Then select **Next**.

Please set up your first processor

a. Select Processor | **b. Payment Methods** | c. Processor Info

Please check desired payment methods for this processor:

- American Express
- Carte Blanc
- Cash
- On-line Debit
- Diners Club
- NOVUS Discover Card
- JAL
- JCB
- MasterCard
- Visa

Next >

18. This will bring you to the **Batch Settlement** screen (**Important Note:** This option will not be available for certain processors. Simply skip step 18-19 if that is the case.) Check the box to the right of **Backup AutoSettlement ?**

a. Select Processor | b. Payment Methods | c. Processor Info

Enter the processor specific Information below:

Batch Settlement

The selections you make here must match the setup parameters at the processor. The processor you've selected supports term based processing meaning the merchant's transactions must be closed out manually from the merchant's location. Check the "Autosettle" option and select a time from the drop-down list if you'd like the BridgePay payment gateway (PathwayLINK) to automatically close out the merchant's open batch of transactions should he or she fail to close it. This eliminates batches being open for multiple days or forgotten completely but has no impact if the merchant closes each day's transactions manually prior the time selected for "Autosettle" on the payment gateway.

Host/Terminal Based	Terminal Based
Host Based Manual Settle	FALSE
Backup AutoSettlement ?	<input checked="" type="checkbox"/>

19. This will open a new option called **Select Auto Close Batch Hour**. Set this to the desired batch time.

Host/Terminal Based	Terminal Based
Host Based Manual Settle	FALSE
Backup AutoSettlement ?	<input checked="" type="checkbox"/>
Select Auto Close Batch Hour:	3:00 AM

Enter Processor-Specific Credentials

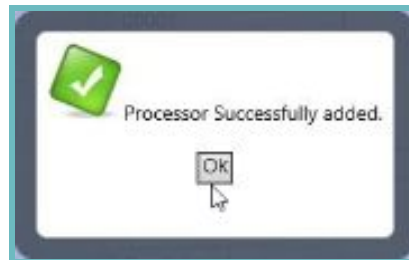
- 20. Scroll down to the **Processor Specific Info** page. Enter all information from the Var\Parameter sheet provided by the processor.
 - a. **Customer Service Phone:** must be in a 111-1111111 format.
 - b. **Time Zone:** It is **imperative** that this matches what you configured earlier and is accurate.
 - c. **Terminal Number vs. TID:** These are TWO different numbers. The Terminal number is typically 8 digits.
 - d. **Industry:** Ensure that the Industry is changed to **Food/Restaurant**.
 - i. If this is configured to something else it will cause restrictions and issues. For example, Direct Marketing will not allow services. Setting to Retail will disable tipping options.



- e. Leave **Connection Method** and **Partial Authorization Support** alone.
- o. Select the red **Set up Processor** button in the bottom center.



- 21. If it completed successfully you will see a confirmation message. Select **OK** to continue.



- 22. It will refresh back to the **Processor Info** page. Scroll down and select the red **Add Services** button to the bottom right.



Adding Services

- 23. On the Add Services screen:
 - a. Check the box to the left of **Enable SecureLink for this Merchant**.
 - b. Under **Merchant Users** select the checkbox to the left of the listed user next to **Enabled**. Select **Save** at the bottom middle to save changes.

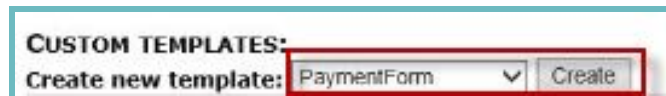


c. Enabling WebLink

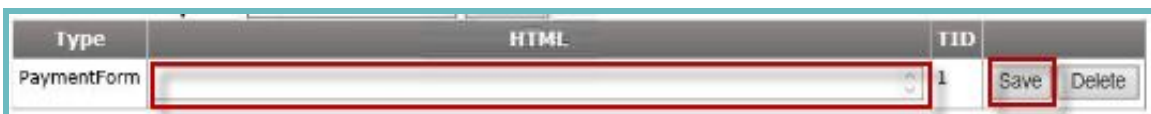
- i. Check the box to the left of **Enable WebLink for this merchant**.



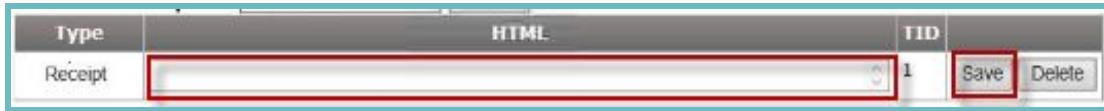
- ii. This will open up an **Application Settings** window and a **Templates** window.
- iii. Scroll to the bottom of the **Templates** window to the **Create new template:** dropdown.
- iv. From the dropdown select **PaymentForm**. Then select **Create**.



- 1. A new section will appear. In the **HTML** column enter in the appropriate HTML code(linked [here](#)).
- 2. Select **Save** when done.



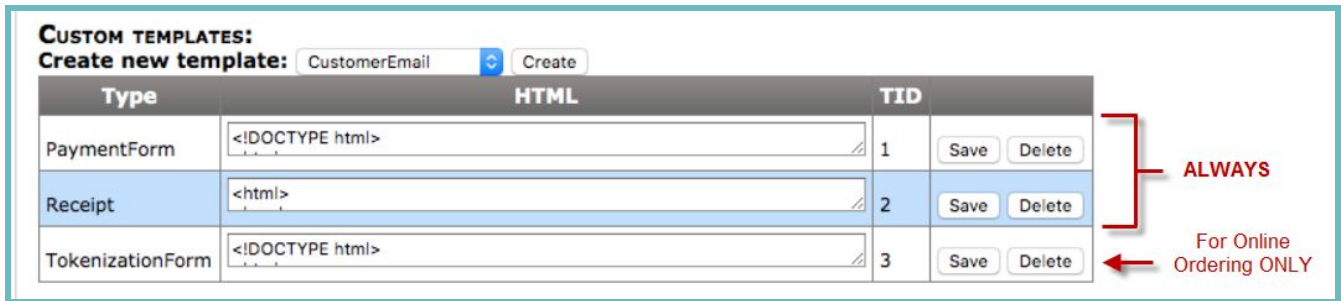
- v. From the **Create New Template** dropdown select **Receipt**. Then select **Create**.
 - 1. A new section will appear. In the **HTML** column enter in the appropriate HTML code(linked [here](#)).
 - 2. Select **Save** when done.



- vi. **If the merchant will be using Online Ordering:** From the **Create New Template** dropdown select **TokenizationForm**.
 1. A new section will appear. In the **HTML** column enter in the appropriate HTML code(linked [here](#)).
 2. Select **Save** when done.



- vii. When complete it should look like this:



- d. Once done scroll to the bottom of the window and select the red **Finish** button to the bottom right. This will take you back to an empty **Board New Merchant** screen to input another merchant if desired.



Editing an Existing Merchant

- 1. To lookup and/or make edits to an Existing Merchant select **Merchant** and then select **Find Merchant** from the dropdown.



- 2. You will be presented with a new screen with various fields you can search by.
- 3. Enter in desired identifying information and select **Find**. If you wish to empty out all fields and reenter select **Reset**.

Partner Name	T-Gate Help Desks	Agent	T-Gate Service Desk
User Name:	<input type="text"/>	Email:	<input type="text"/>
First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Merchant Key:	<input type="text"/>	Company Name:	<input type="text"/>
Phone:	<input type="text"/>	Fax:	<input type="text"/>
City:	<input type="text"/>	Postal Code:	<input type="text"/>

- 4. If any merchant's fit the search criteria they will show below.
- 5. Select the **Select** button to the left of the desired merchant.

	Merchant Key	Company Name	Email	Creation Date	Active
Select	99516	HRT Agent POS		3/20/2019 12:14:24 PM	True

- 6. This will take you to the various screens you go through when boarding a merchant and give you an **Edit** option out to the right of areas you can edit.
- 7. Select the **Edit** button to the right of any area you need to change and it will open up to allow you to make changes.

Company Profile

Active	<input checked="" type="checkbox"/>	Location Id	0
Partner Name	T-Gate Help Desks	Agent Name	T-Gate Service Desk
1. Merchant's Company Name	HRT Agent POS	2. Time Zone:	Central Time Zone
3. First Name	Dana	4. Last Name	Wayne
5. Day Phone	111-111-1111	6. Email	dana@danadana.com
7. Address 1	123 Main St	8. Address 2	
9. City	Chicago	10. State	Illinois
11. Zip	60661	12. Country	United States

8. When done making changes select the **Save** button under the respective window.

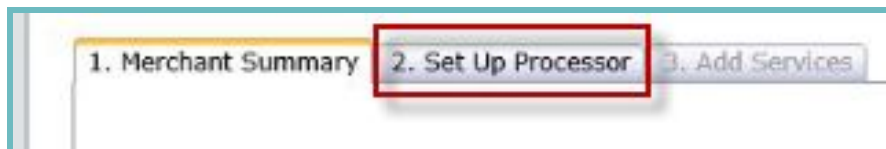
Active	<input checked="" type="checkbox"/>	Location Id	0
Partner Name	T-Gate Help Desks	Agent Name	T-Gate Service Desk
1. Merchant's Company Name	HRT Agent POS	2. Time Zone:	Central Time Zone
3. First Name	Dana	4. Last Name	Wayne
5. Day Phone	111-111-1111	6. Email	dana@danadana.com
7. Address 1	123 Main St	8. Address 2	
9. City	Chicago	10. State	Illinois
11. Zip	60661	12. Country	United States

9. An example of this being useful is to quickly change and then change back the **Virtual Terminal Settings** to allow a merchant to do a refund even if they do not have the Original PNRef.
- By default the **Require Original PNRef** setting is set to **True**.
 - If you select **Edit**, change this to **False** and then select **Save**. It will allow this.
 - Important Note:** This setting should be switched back to **True** after the one time refund is completed. This is not something merchant's want to allow all the time

Adding Heartland Gift Card Processing

Important Note: Heartland Gift Card Processing through Bridgepay specifically requires Heartland Portico credentials to be set up on Heartland's end to work. **This is ONLY possible if Heartland Credit Processing is being used.**

- While under the **Edit Merchant** screen you can add Gift Card processing to an account if desired.
- Select the **Set Up Processor** tab.

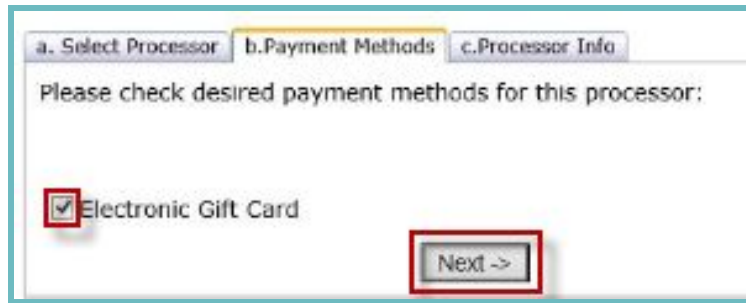


- Select **Portico** from the **Select a payment Processor** dropdown. Then select **Next**.

Select a payment Processor: Portico

Next ->

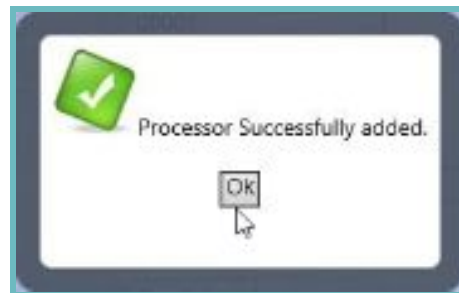
- On the **Payment Methods** tab select the checkbox to the left of **Electronic Gift Card**. Then select **Next**.



- On the **Processor Info** tab scroll down to **Processor Specific Info** and enter the requested information from the **Parameter Sheet**.
- When done select the red Set up Processor button in the bottom center.



- A confirmation message will appear letting you know it was successfully added.

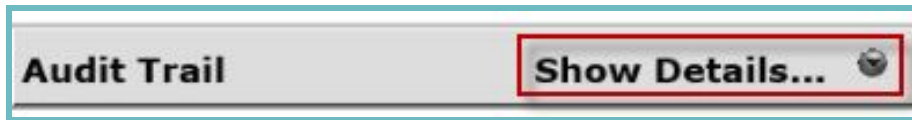


- You will now see **Portico**(Heartland Gift) listed under the **Configured Processors**.

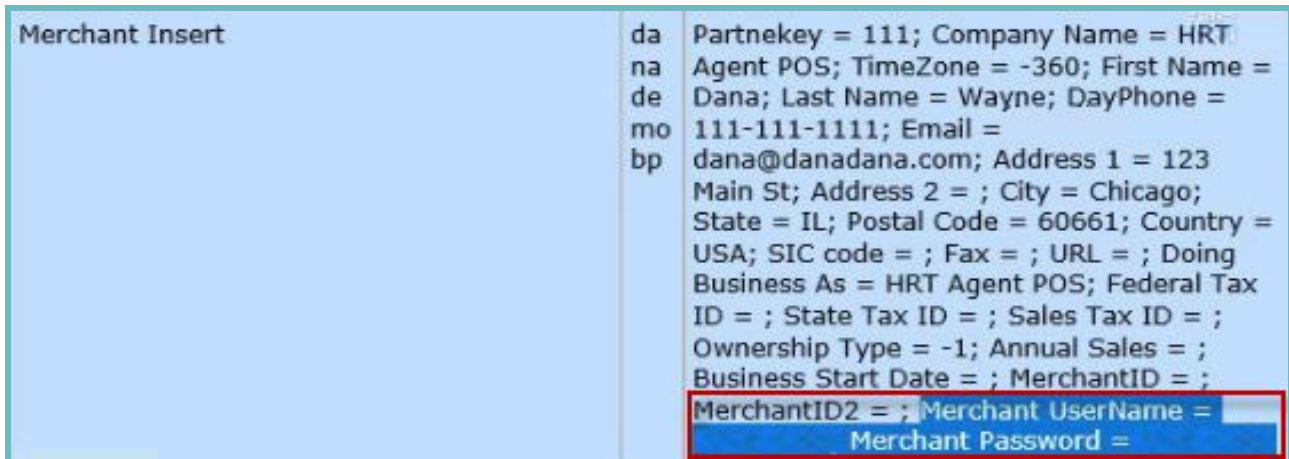
Configured Processors		
	Processor	Payment Type
Edit Delete	Heartland Payment Systems	AMEX
		DISCOVER
		MASTERCARD
		VISA
Edit Delete	Portico	EGC

Locating Original Username and Password

1. While in the **Edit Merchant** screen, you can locate the original Username and Password if it is ever needed for troubleshooting.
2. To do so go to the **Merchant Summary** tab and scroll to the very bottom. Select **Show Details** to the right of **Audit Trail**.



3. At the bottom of the **Audit Trail** select the last page. Scroll to the bottom to **Merchant Insert**. You will see the Merchant Username and the Merchant Password at the bottom.



Access Notes

1. Dealer's will have a log in to the gateway. Through this login they can manage their merchants.
 - a. This is the page to login to the gateway: <https://gateway.itstgate.com/admin/login.aspx>
2. They can email the username and password for a particular account or reset the password.
3. The dealer or merchant should **NEVER** change or use the POS Username and password to log into the gateway. They should each have their own separate logins created for that purpose.

HTML Files

Please see [here](#) for all of the HTML files needed.

These are to be used for WebLink template setup described [here](#).