Portico VT Online

PIN Pad Guide
FOR HEARTLAND MERCHANT USERS

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1 Overview

Heartland Portico Virtual Terminal (Portico VT) is now available in your browser. It has the same look and feel as the desktop version, but communication with PIN pad devices now uses Heartland’s proprietary Heartland Peripheral Manager.

1.1 System requirements

The following is a list of required hardware and software components to run Portico VT.

<table>
<thead>
<tr>
<th>Type</th>
<th>Compatible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hardware</td>
<td>• Laptop</td>
</tr>
<tr>
<td></td>
<td>• Internet connection</td>
</tr>
<tr>
<td></td>
<td>• PC</td>
</tr>
<tr>
<td></td>
<td>• Internet connection</td>
</tr>
<tr>
<td></td>
<td>• Keyboard</td>
</tr>
<tr>
<td></td>
<td>• Mouse</td>
</tr>
<tr>
<td></td>
<td>• Monitor</td>
</tr>
<tr>
<td>Operating System</td>
<td>• Windows 7, 8.1, or 10</td>
</tr>
<tr>
<td>Browsers</td>
<td>• Supported on IE 9 through 11</td>
</tr>
</tbody>
</table>

Note: VT Online is not certified on Mac computers and does not work with Safari.

1.2 Supported peripherals

<table>
<thead>
<tr>
<th>Type</th>
<th>Compatible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peripherals</td>
<td>Card readers</td>
</tr>
<tr>
<td></td>
<td>• Magtek USB Card Reader</td>
</tr>
<tr>
<td></td>
<td>• E3 USB Card Reader</td>
</tr>
<tr>
<td>PIN pads</td>
<td>• VeriFone 1000SE PIN Pad (Serial/Serial to USB converter)</td>
</tr>
<tr>
<td></td>
<td>• Heartland E3 PIN Pad (USB)</td>
</tr>
<tr>
<td></td>
<td>• Ingenico EMV PIN Pad iPP320</td>
</tr>
<tr>
<td>Receipt printers</td>
<td>• Epson Receipt Printer</td>
</tr>
<tr>
<td></td>
<td>• Star Receipt Printer</td>
</tr>
</tbody>
</table>
2 Using PIN Pads with Portico VT Online

2.1 Supported PIN pads

Heartland Portico Virtual Terminal supports the following PIN Pads:

- Heartland E3 PIN Pad (USB)
- Ingenico iPP320 EMV PIN Pad (USB)
- VeriFone 1000SE PIN Pad (Serial or Serial-to-USB)

2.1.1 PIN Pad COM Port

VT Online will communicate with the PIN pad on the same COM port that you are using today. To note the COM port:

1. In the Portico Virtual Terminal desktop application, click **Admin > Settings > Hardware > PIN Pad**.
2. Note which COM port is being used by the PIN pad.
3. Return to the Home page.
4. Click the link to Portico VT online.

2.2 Launch Portico VT

Portico VT Online uses Heartland’s proprietary Heartland Peripheral Manager to communicate with PIN Pads. It will use the same COM port that is used in the desktop application today. Portico VT is an application that runs in your browser. The only supported browser is Internet Explorer. This is a secure application. Some drivers and/or plug-ins may be needed in order to use Portico VT Online.

The URL to access Portico VT is: [https://terminal.heartlandportico.com/Portico.aspx?inb=1](https://terminal.heartlandportico.com/Portico.aspx?inb=1)

To use Portico VT Online:

1. Click the **click here** link on the desktop version Home screen or go to: [https://terminal.heartlandportico.com/Portico.aspx?inb=1](https://terminal.heartlandportico.com/Portico.aspx?inb=1).

   Step Result: Portico VT Online webpage opens.

**Note:** When you click on the Portico VT URL, the browser determines if the correct version of the Silverlight plug-in is installed. If it is not, you will be prompted to download the latest version. Your computer will walk you through the installation process.

2. When the login screen displays, type your username and new password.
3. Click **Login**.

   Step Result: Portico VT Online home page displays.
2.3 Heartland Peripheral Manager

Each user will need to download the Heartland Peripheral Manager. All users on a machine will share the settings.

2.3.1 Microsoft .NET Framework

Please note that the Heartland Peripheral Manager requires Microsoft .NET Framework 3.5 or higher. This is standard on Windows 7 or higher. If you receive an error indicating that you need to install this, first validate whether it is already installed, but not enabled on your machine.

1. Go to Programs and Features.
2. Click Turn Windows features on or off.
3. Scroll down to find Microsoft .NET and make sure the check box is selected.

2.3.2 Install the Heartland Peripheral Manager

Each user will need to download the Heartland Peripheral Manager. To install the Heartland Peripheral Manager:

1. Click Admin > Settings.
2. Click the Hardware Drivers tab.
3. By PIN Pad Communication (in Browser), click Heartland Peripheral Manager. If asked if you would like to allow the download, always select Run/Yes/Allow Access. You may see a warning about .msi files. Click Actions, then Run Anyway.

Result: The Heartland Peripheral Manager is downloaded. The installer should run automatically. If it does not, you may need to find the file name and double click it to initiate the installation.

Note: If you see a firewall alert the first time you run the program, allow access for the Heartland Peripheral Manager. If you get an "Access Denied" error, you may have to add HeartlandPeripheralManager.exe to your firewall exception list manually.

Note: If you receive an error stating that the Heartland Peripheral Manager is currently running, you do not need to launch it from the Start menu. Heartland Peripheral Manager is running and can be accessed from the system tray (click the arrow by the system clock). If the Heartland Peripheral Manager is not in the System Tray, your antivirus software could be blocking it from running. Add HeartlandPeripheralManager.exe to the exception list in your antivirus software. Heartland Peripheral Manager is located in the Program Files on the computer.

Note: When the install is complete, the Settings page may display automatically.

2.3.3 Configuration settings

To configure the Heartland Peripheral Manager to communicate with a PIN Pad:
1. Open the Heartland Peripheral Manager Settings page. If the page did not display automatically, then it can be launched from the Start menu or the icon in the system tray. You may have to allow the application to make changes on the computer; always select Yes/Allow Access.

2. Under Type, select the desired peripheral from the drop down list. 
   **Result:** The Advanced Settings are populated with the defaults for the device.

3. Select the COM Port number for the PIN pad.
   **NOTE:** This is the same COM port in the desktop version.

4. Note the Local Port number in the lower section. This number, by default, will match the Local Port in VT under *Admin > Settings > Hardware > PIN Pad > Local Port*. These two values must always match.

5. Click **Save**.

**Note:** The settings only need to be configured once on the machine. All users on the machine will share the settings file.

### 2.3.4 Local port consistency

The Local Port number in the Heartland Peripheral Manager must always match the Local Port in Portico VT. In VT, this is found under *Admin > Settings > Hardware > PIN Pad > Local Port*. If the value is changed in one location, it must be updated in the other as well. See the screenshots below.
2.3.5 View/modify settings

If you need to view or modify the settings for the Heartland Peripheral Manager, right-click the Heartland Peripheral Manager icon in the system tray and click Settings. You may have to click the arrow to "show hidden icons" to see the Heartland Peripheral Manager icon.

2.3.6 Communicate with PIN pads

To be able to use PIN Pads with Portico VT, Heartland Peripheral Manager must be running. It is set to auto-start when the computer is turned on. If you have any tools that disable automatic start-up, you will need to manually start the Heartland Peripheral Manager before logging in to Portico VT. Right-click the Heartland Peripheral Manager icon in the system tray and click Start. You may have to click the "show hidden icons" arrow to see the Heartland Peripheral Manager icon.

2.3.6.1 Check PIN pad connectivity

If you experience a problem with the PIN pad, you can check the device connectivity using Portico VT Online. Communication problems can occur if the device is disconnected and reconnected, or attached after login.

1. Ensure the device is connected to the computer.
2. Ensure the Heartland Peripheral Manager is running.
3. Log in to Portico VT Online.
4. Click Admin > Settings > Hardware > PIN Pad.
5. Click Check Connectivity.

Step Result: A message displays indicating that the connection is OK or that the PIN pad cannot be found. If the Heartland Peripheral Manager is running and the PIN pad is connected, close the browser, re-launch VT, and retry these steps.

2.3.6.2 Communication failure

If the Heartland Peripheral Manager cannot communicate with the PIN pad and the COM port connection is lost, the program will alert the user. A balloon message will display briefly:

Also, the application icon in the System Tray will change to display an exclamation mark.

Right-click the icon and click Start to re-establish communication.

Note: If the Heartland Peripheral Manager repeatedly shows the communication error:
1. In the System Tray, right-click the Heartland Peripheral Manager icon.
2. Click Exit.
3. Unplug the PIN pad.
4. Close VT (if running) and close the browser.
5. Connect PIN pad to a different COM Port. Use Device Manager to note the new COM port number (refer to PIN pad installation instructions for your device type as needed).
6. In the System Tray, right-click the Heartland Peripheral Manager icon.
7. Click Settings.
8. Update the COM port to the new number.
9. Click Save.
10. In the System Tray, right-click the Heartland Peripheral Manager icon.
11. Click Start.
12. Re-launch VT.

2.3.7 Link to VT Online

The Heartland Peripheral Manager has a link to the Portico VT Online URL. Right-click the Heartland Peripheral Manager icon in the system tray and click Launch VT. This will take you to the login page. You may have to click the “show hidden icons” arrow to see the Heartland Peripheral Manager icon.

2.3.8 More information

For more information, there is a link to a Peripheral Guide from Portico VT Online. Click Support > View Peripheral Guide.