ServiceMinder|Pay - Token Transfers

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Migrating Tokens to ServiceMinder Pay

If you're switching your payment processing to **ServiceMinder Pay**, you may need to transfer existing card tokens from your current provider. The process varies depending on your current processor.

Before requesting a token transfer, please review your contract structure with your current payment provider to ensure you're authorized to request token transfers for multiple organizations or locations at once.

This article will review:

- TSYS
- Heartland
- All Other Payment Providers
- Lossless Token Transfer

TSYS

If your current provider is **TSYS,** service**minder** can assist with initiating the token migration process.

1. Download Existing Tokens
   - Visit this **Card Tokens Report link** to download and extract current tokens using the Contact ID.
   - This ensures each token is correctly matched to the appropriate contact in your system.

2. Submit a Support Ticket
   - Email: support@serviceminder.com
   - Include the CSV file with token data from the report.

3. ServiceMinder Support Coordinates With Processors
   - Our team will contact TSYS to request the token extraction.
   - Once received, our team will submit the file for re-tokenization.

Additional Bank Linking Directions here.

Heartland

1. Download and complete the linked Liability Form
   - The Token Group and and Token Number are not needed on the form.
   - Find the **PGP Public Key** here.

- If asked for a Ticket Number, use 27087.

2. Send your completed form to jonathan.hawk@heartland.us and let him know you are requesting token transfer from Heartland to Forward. Include the contact information for the token transfer as follows:

- **New Processor:** Forward
- **Point of Contact:** Dustin Haire
- **Title:** Support Manager
- **Email Address:** support@getfwd.com (CC: migrations@getfwd.com)
- **Phone Number:** (512) 394-4331

Quick tip: When sending, we recommend asking for confirmation the migration request was received and an estimated timeline for when the tokens will be sent.

Sample Email:

Hi Jon,

I've completed the attached Liability Waiver Form to initiate a token transfer from Heartland to Forward. Please note the Token Group and and Token Number fields have been left blank per the instructions.

New processor details for the transfer:
Processor: Forward
Point of Contact: Dustin Haire, Support Manager
Email: support@getfwd.com
CC: migrations@getfwd.com
Phone: (512) 394-4331

Please confirm once the migration request has been received, and if possible share an estimated timeline for when the tokens will be sent.

Thank you for your help.

Best,
[Your Name]

4. Close Existing Processor Account (Optional)

- Once all tokens and payments are active in ServiceMinder Pay, you may cancel your existing processor to avoid ongoing fees.
- Remember to settle any pending refunds, chargebacks, or deposits before closing.

Please Note: The token transfer process is not controlled by service**minder**. While Heartland states that the process typically takes about about a month, we have not seen them be overly responsive. To avoid interruptions, you can continue using your old processor during this transfer period.

Additional Bank Linking Directions here.

All Other Payment Providers

If you're migrating from **Authorize.net**, **QuickBooks Payments**, or another provider, the merchant (you) must initiate the token transfer.

What You Need to Provide

Your processor should give you a file that matches our standard token import format:

```
Contact ID, New Profile ID, New Payment ID
```

Download your tokens from ServiceMinder to map them correctly to contacts.



If your file includes only old-to-new token mappings, use Excel's **VLOOKUP** to rebuild the file using your current token report to match tokens to contacts.

Token Migration Format Guide

Column Name	Description
ContactId	Our contact Id -- available from the token download you used to initiate the token transfer. **If not provided, the next two columns must be present.**
OldProfileId	The existing Profile Id. Both Profile and Payment fields are required if contact Id is not present. If Contact Id is included, the existing Profile/Payment Ids are ignored.
OldPaymentId	The existing Payment Id
NewProfileId	The new contents for the Profile Id field (required)
NewPaymentId	The new contents for the Payment Id field (required)
ACH	0 for card, 1 for ACH (so we know what type of token it is). If missing, we assume card.
Last4	The last 4 digits of the account number, if missing, card numbers may not display depending on the gateway, but charges should still be able to run successfully.
Expiration	The expiration date in MM/YYYY or MM/DD/YYYY format
NameOnCard	The card holder's name

Lossless Token Transfer

Lossless token transfer allows you to switch from your existing payment gateway to service**minder**|pay without losing saved payment methods or requiring customers to re-enter their card details.

This dual-path setup allows for a smooth, interruption-free transition, giving your business time to gradually shift everything to the new platform while maintaining payment continuity for existing customers.

How It Works

- When you enable service**minder**|pay, any existing payment tokens in your account are tagged as part of the old gateway

- These tokens continue to process transactions using your previous payment gateway, even after service**minder**|pay is active.
- New payment information captured after enabling service**minder**|pay will be processed through the new gateway (Forward).
- Both systems work in parallel—service**minder**|pay for new transactions, your old provider for legacy tokens.

What You Need to Do

- Keep your old gateway active to ensure existing tokens can still process payments.
- Don't delete or deactivate tokens in the service**minder**|pay system; they'll continue working as long as the old gateway account remains open.
- Over time, as customers update their card info or save new payment methods, these will automatically route through ServiceMinder Pay.

Important Caveats

- Refunds for transactions processed on the old gateway must still be handled through that provider.
- Reporting for old transactions will not appear in the service**minder**|pay dashboard, but will remain visible in your previous gateway’s reporting tools.