

Partner rePortal

The Partner rePortal is a reporting tool that can help you track the results of referrals you submit, and compensation you receive from Heartland associated with your referrals. You and/or your employees should enter ALL your referrals directly into the rePortal. A step by step tutorial is outlined below.

This tutorial contains the following steps:

- Logging In
- How to View Payments
- How to Submit/Track Referrals

Heartland

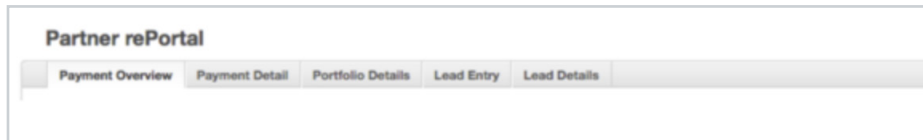
Logging In

Please follow the steps below to generate your login information:

1. Visit <https://reports.heartlandpaymentsystems.com/>
2. Click "Forgot Password" link under the Password field and enter your email address
3. Click "Reset"
4. You will receive an email from PartnerReporting@e-hps.com with a link to enter a new password. After setting up your new password, navigate back to <https://reports.heartlandpaymentsystems.com/> and log in.

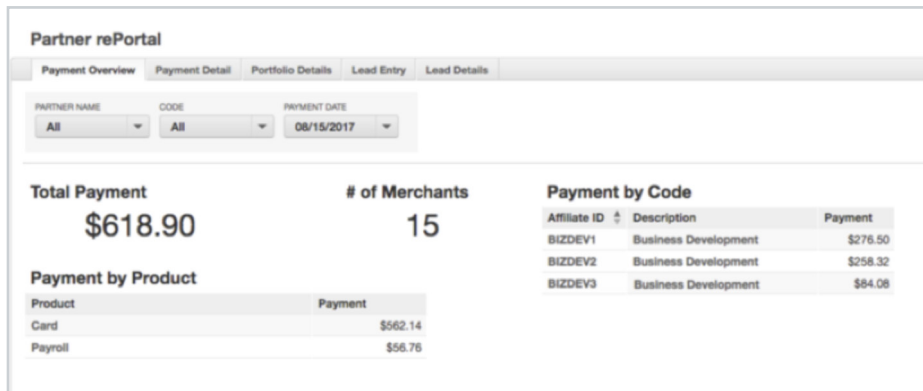
How to View Payments

The Partner rePortal contains multiple dashboards designed for specific reporting needs. Dashboard navigation can be found across the top of the page.



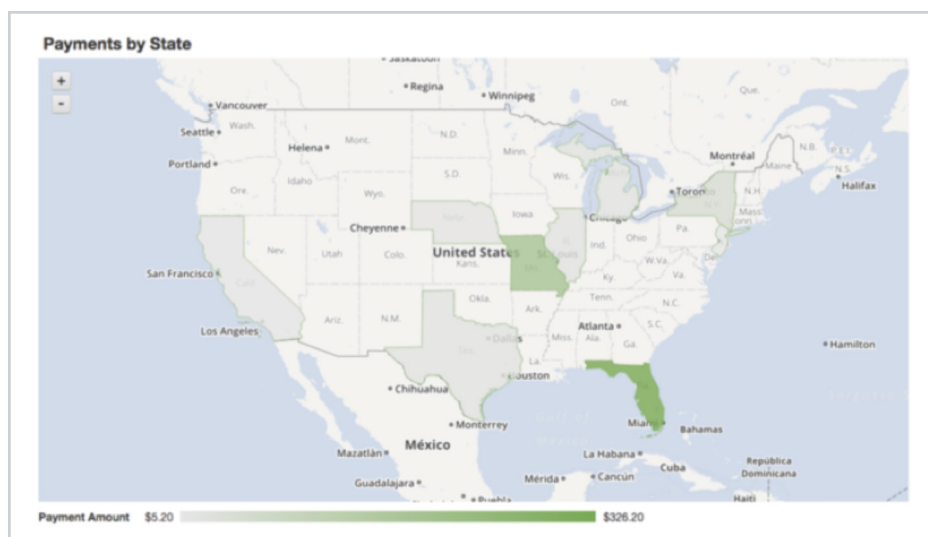
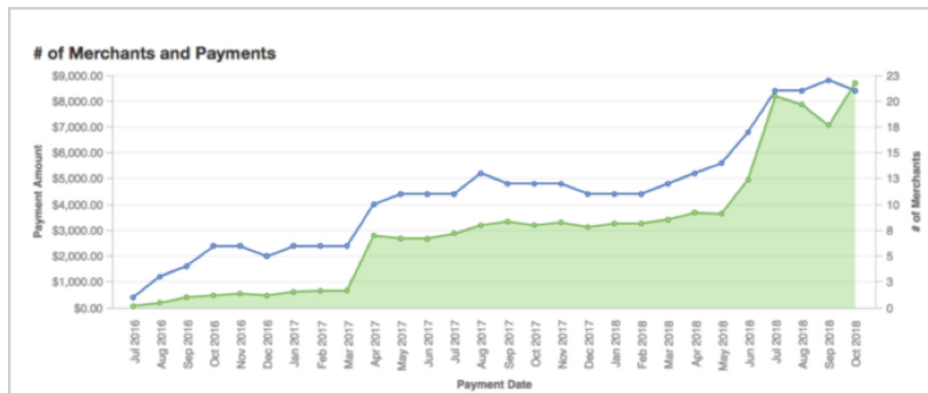
Payment Overview Dashboard

The total payment is broken down by product and affiliate code and is summarized at the top of the Payment Overview dashboard. Note: Payments are dispersed around the 22nd of the month following activity. For example, March activity is paid on approximately April 22nd.



Graphs are available for visual representation on this dashboard. One graph shows the number of merchants and the payment amounts over time. Another shows the payment amount per state.

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Payment Details

The Payment Details tab shows the breakdown of each of your payments by merchant and provides details on how each payment was calculated.

Payment Details										
1 Basis Point = 0.0001										
Account Number	Merchant Name	Code	Per Trans	# of Trans	BPs x Vol	Volume	Margin	Margin %	FLS	Payment
9900054942	Sandy Waters	BIZDEV1	\$0.02	6,869	0	0	0	0	\$20	\$137.38
99000704694	Downtown Pizza	BIZDEV1	\$0.02	3,383	0	0	0	0	\$20	\$67.66
99000747053	Jimbo's Crab Bar	BIZDEV1	\$0.02	3,573	0	0	0	0	\$20	\$71.46
99000760364	Candy and More	BIZDEV2	\$0.02	260	0	0	0	0	0	\$5.20
99000762895	Bakery To Go	BIZDEV2	\$0.02	2,362	0	0	0	0	0	\$47.24
99000776635	Food Mart	BIZDEV3	0	0	0	0	\$546.36	5%	0	\$27.32
99000793836	Cheesecake House	BIZDEV2	\$0.02	434	0	0	0	0	0	\$8.68
99000801293	Joel's Bakery	BIZDEV2	\$0.02	3,571	0	0	0	0	0	\$71.42
99000801298	Cupcake Gallery	BIZDEV2	\$0.02	2,549	0	0	0	0	0	\$50.98
99000801299	Joel's Bakery Kirkwood	BIZDEV2	\$0.02	2,948	0	0	0	0	0	\$58.96
99000823227	Bills Famous Cheesecakes	BIZDEV2	\$0.02	792	0	0	0	0	0	\$15.84
990AD	Clampitt	BIZDEV3	0	0	0	0	\$304.97	5%	0	\$15.25
990AF	Panama City Solar	BIZDEV3	0	0	0	0	\$447.67	5%	0	\$22.38
990AY	South Street Pub	BIZDEV3	0	0	0	0	\$112.72	5%	0	\$5.64
990AZ	Doyle Irish Pub	BIZDEV3	0	0	0	0	\$269.84	5%	0	\$13.49

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Click on a specific merchant or payment amount for additional details.

Payment Details

Account Number

Merchant Name

Code

Per Trans

of Trans

BP's x Vol

Volume

Margin

Margin %

FLS

Payment

99000545942

Sandy Waters

BIZDEV1

\$0.02

6,869

0

0

0

0

\$20

\$137.38

99000704694

Downtown Pizza

BIZDEV1

\$0.02

3,383

0

0

0

0

\$20

\$67.66

99000747053

Jimbo's Crab Bar

BIZDEV1

\$0.02

3,573

0

0

0

0

\$20

\$71.46

99000760364

Candy and More

BIZDEV2

\$0.02

\$5.20

99000762895

Bakery To Go

BIZDEV2

\$0.02

\$47.24

99000776635

Food Mart

BIZDEV3

0

\$27.32

99000793836

Cheesecake House

BIZDEV2

\$0.02

\$8.68

99000801293

Joes Bakery

BIZDEV2

\$0.02

\$71.42

99000801296

Cupcake Gallery

BIZDEV2

\$0.02

\$50.98

99000801299

Joes Bakery Kirkwood

BIZDEV2

\$0.02

\$58.96

99000823227

Bills Famous Cheesecakes

BIZDEV2

\$0.02

\$15.84

990AD

Clampitt

BIZDEV3

0

\$15.25

990AF

Panama City Solar

BIZDEV3

0

\$22.38

990AY

South Street Pub

BIZDEV3

0

\$5.64

990AZ

Doyle Irish Pub

BIZDEV3

0

\$13.49

1 Basis Point = 0.0001

Account Number

Merchant Name

Address

City

State

Zip

Owner Name

Sales Person

Install Date

Client Status

Product

Affiliate ID

Payment Description

Payment

99000704694

Downtown Pizza

1509 S Andrews Ave

FORT LAUDERDALE

FL

33316

CHRIS KAPAKOS

(empty value)

Feb 2017

Installed

Card

BIZDEV1

First Line Support

per Transaction

\$20.00

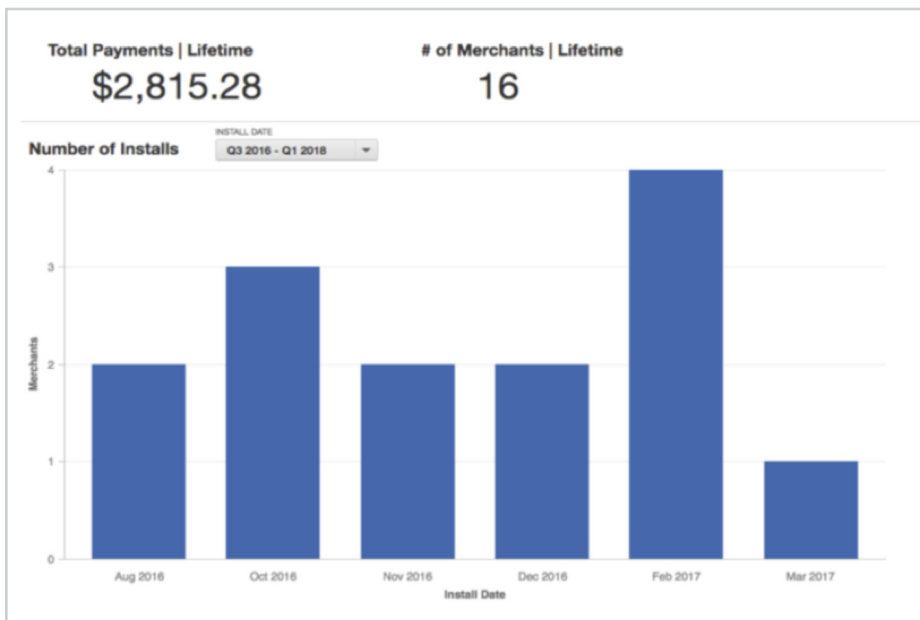
\$66.24

Please note:

The Payment Details report reflects only those merchants that generated a payment for that time period. If a merchant is missing from the report, there may not have been enough activity to generate a payment during that time period. All merchants can be found on the Portfolio Details dashboard, regardless of payment amount.

Portfolio Details

The Portfolio Details tab displays the lifetime payments summary information as well as the total number of merchant installs for the portfolio.



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The Merchant Details report displays a list of all merchants and their total lifetime payment. Click on the payment total for historical details.

Merchant Details							
MERCHANT STATUS							
All							
Account Number	Merchant Name	Address	City	State	Zip	Install Date	Payment
99000623227	Bills Famous Cheesecakes	13635 W 9 Mile Rd	OAK PARK	MI	48237	Mar 2017	\$63.36
99000762895	Bakery To Go	185 26 UNION TPK	FRESH MEADOWS	NY	11366	Feb 2017	\$188.96
99000760364	Candy and More	1417 S Robertson Blvd	LOS ANGELES	CA	90035	Feb 2017	\$60.44
99000704694	Downtown Pizza	1509 S Andrews Ave	FORT LAUDERDALE	FL	33316	Feb 2017	\$376.88
990AZ	Doyle Irish Pub	5157 Main St	DOWNERS GROVE	IL	60515	Feb 2017	\$53.96
990AY	South Street Pub	18 COTTONWOOD RD	MORRISTOWN				
99000793636	Cheesecake House	6548 ORCHARD LAKE RD	BRUNING				
99000747053	Jimbo's Crab Bar	6200 N Ocean Dr	HOLLYWOOD				
99000601298	Cupcake Gallery	13700 Olive Blvd	CHESTERFIELD				
99000601293	Joes Bakery	3055 Lemay Ferry Rd	SAINT LOUIS				
99000601299	Joes Bakery Kirkwood	113 N Kirkwood Rd	KIRKWOOD				
990AD	Clampit	403 EAST RAMSEY RD STE	SAN ANTONIO				
99000545942	Sandy Waters	2237 W Hillsboro Blvd	DEERFIELD BEACH				
99000776635	Food Mart	8804 Lone Star Rd	JACKSONVILLE	FL	32211	Jun 2016	\$109.28
990AF	Panama City Solar	701 PIER PARK DRIVE STE	PANAMA CITY BEACH	FL	32413	Feb 2016	\$89.52

Month/Year (Payment date)	Payment
May 2017	\$47.24
Jun 2017	\$47.24
Jul 2017	\$47.24
Aug 2017	\$47.24
Rollup	\$188.96

Filters

Select from the filter options available on each dashboard. Click apply to activate the filter.

Payment OverviewPayment DetailPortfolio DetailsLead EntryLead Details

PARTNER NAMEAllCODEAllPAYMENT DATE06/15/2017...

Total Payment

\$1,237.80

Payment by Product

Product

Card

Payroll

Search...

Select all - Clear

☒ 06/15/2017

☒ 07/15/2017

☐ 06/15/2017

☐ 05/15/2017

☐ 04/15/2017

CancelApply

Payment by Code

Affiliate ID	Description	Payment
BIZDEV1	Business Development	\$553.00
BIZDEV2	Business Development	\$516.64
BIZDEV3	Business Development	\$168.16

Payment Details

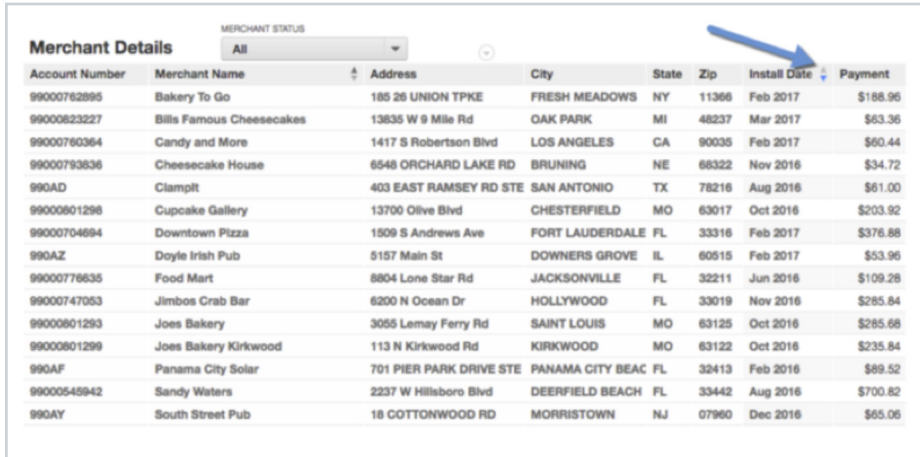
1 Basis Point = 0.0001

Account Number	Merchant Name	Code	Per Trans	# of Trans	BPs x Vol	Volume	Margin	Margin %	FLS	Payment
99000545942	Sandy Waters	BIZDEV1	\$0.02	13,738	0	0	0	0	\$40	\$274.76
99000704694	Downtown Pizza	BIZDEV1	\$0.02	6,766	0	0	0	0	\$40	\$135.32
99000747053	Jimbo's Crab Bar	BIZDEV1	\$0.02	7,146	0	0	0	0	\$40	\$142.92

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Sorting

Reports are sortable by clicking the ascending/descending arrows on a column header.



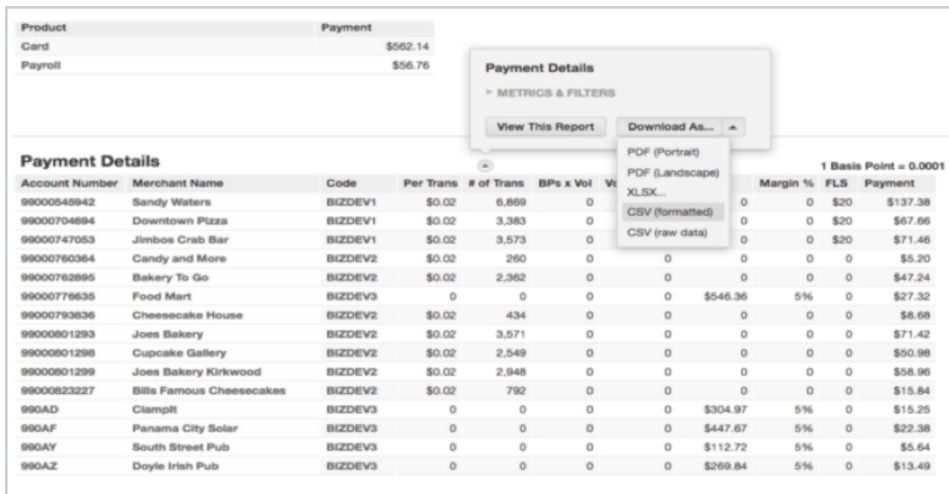
Merchant Details

MERCHANT STATUS: All

Account Number	Merchant Name	Address	City	State	Zip	Install Date	Payment
99000762895	Bakery To Go	185 26 UNION TPKE	FRESH MEADOWS	NY	11366	Feb 2017	\$188.96
99000823227	Bills Famous Cheesecakes	13835 W 9 Mile Rd	OAK PARK	MI	48237	Mar 2017	\$63.36
99000760364	Candy and More	1417 S Robertson Blvd	LOS ANGELES	CA	90035	Feb 2017	\$60.44
99000793836	Cheesecake House	6548 ORCHARD LAKE RD	BRUNING	NE	68322	Nov 2016	\$34.72
990AD	Clampit	403 EAST RAMSEY RD STE	SAN ANTONIO	TX	78216	Aug 2016	\$61.00
99000801296	Cupcake Gallery	13700 Olive Blvd	CHESTERFIELD	MO	63017	Oct 2016	\$203.92
99000704694	Downtown Pizza	1509 S Andrews Ave	FORT LAUDERDALE	FL	33316	Feb 2017	\$376.88
990AZ	Doyle Irish Pub	5157 Main St	DOWNERS GROVE	IL	60515	Feb 2017	\$53.96
99000776635	Food Mart	8804 Lone Star Rd	JACKSONVILLE	FL	32211	Jun 2016	\$109.28
99000747053	Jimbo's Crab Bar	6200 N Ocean Dr	HOLLYWOOD	FL	33019	Nov 2016	\$265.84
99000801293	Joes Bakery	3055 Lemay Ferry Rd	SAINT LOUIS	MO	63125	Oct 2016	\$265.68
99000801299	Joes Bakery Kirkwood	113 N Kirkwood Rd	KIRKWOOD	MO	63122	Oct 2016	\$235.84
990AF	Panama City Solar	701 PIER PARK DRIVE STE	PANAMA CITY BEAC	FL	32413	Feb 2016	\$89.52
99000545942	Sandy Waters	2237 W Hillsboro Blvd	DEERFIELD BEACH	FL	33442	Aug 2016	\$700.82
990AY	South Street Pub	18 COTTONWOOD RD	MORRISTOWN	NJ	07960	Dec 2016	\$65.06

Exporting

Place your cursor over the report and select the arrow next to the report title, then choose Download As and select your preferred file format.



Product **Payment**

Card \$562.14

Payroll \$56.76

Payment Details

METRICS & FILTERS

View This Report Download As...

PDF (Portrait)

PDF (Landscape)

XLSX...

CSV (formatted)

CSV (raw data)

1 Basis Point = 0.0001

Account Number	Merchant Name	Code	Per Trans	# of Trans	BPs x Vol	Margin %	FLS	Payment
99000545942	Sandy Waters	BIZDEV1	\$0.02	6,869	0	0	0	\$137.38
99000704694	Downtown Pizza	BIZDEV1	\$0.02	3,383	0	0	0	\$67.66
99000747053	Jimbo's Crab Bar	BIZDEV1	\$0.02	3,573	0	0	0	\$71.46
99000760364	Candy and More	BIZDEV2	\$0.02	260	0	0	0	\$5.20
99000762895	Bakery To Go	BIZDEV2	\$0.02	2,362	0	0	0	\$47.24
99000776635	Food Mart	BIZDEV3	0	0	0	0	0	\$27.32
99000793836	Cheesecake House	BIZDEV2	\$0.02	434	0	0	0	\$8.68
99000801293	Joes Bakery	BIZDEV2	\$0.02	3,571	0	0	0	\$71.42
99000801296	Cupcake Gallery	BIZDEV2	\$0.02	2,549	0	0	0	\$50.98
99000801299	Joes Bakery Kirkwood	BIZDEV2	\$0.02	2,948	0	0	0	\$58.96
99000823227	Bills Famous Cheesecakes	BIZDEV2	\$0.02	792	0	0	0	\$15.84
990AD	Clampit	BIZDEV3	0	0	0	0	0	\$15.25
990AF	Panama City Solar	BIZDEV3	0	0	0	0	0	\$22.38
990AY	South Street Pub	BIZDEV3	0	0	0	0	0	\$5.64
990AZ	Doyle Irish Pub	BIZDEV3	0	0	0	0	0	\$13.49

For assistance with the Partner rePortal, please reach out to your Heartland representative or email our Business Development Operations team at bizdev@e-hps.com.

How to Submit/Track Referrals

Lead Entry

To enter a lead, navigate to the Lead Entry tab

The screenshot shows the 'Lead Entry' tab in the Heartland system. The form is titled 'Your Information' and 'Referral Details'. It includes fields for personal information (First Name, Last Name, Phone Number, Email Address) and business information (Business Name, Business Description, Contact First Name, Contact Last Name, Business Phone, Email Address, Address, City, State, Zip Code). There is also a section for 'Notes (Products of Interest, Best Time to Call, Special Instructions)' and a checkbox for 'Business has expressed interest in this service and agreed to contact by Heartland.' A green 'Submit' button is located at the bottom right of the form.

Payment Overview | Payment Detail | Portfolio Details | **Lead Entry** | Lead Details

Heartland A Global Payments Company

PARTNER REFERRAL - SUCCEEDING TOGETHER

Your Information

* First Name * Last Name

* Phone Number * Email Address

Referral Details

* Business Name Business Description

* Contact First Name * Contact Last Name

* Business Phone Email Address

* Address * City

* State * Zip Code

Select a state

Notes (Products of Interest, Best Time to Call, Special Instructions)

☐ Business has expressed interest in this service and agreed to contact by Heartland.

Fill out the top section entitled “Your Information” with your name and contact information.

Under the “Referral Details” section, fill in the information of the business you are referring to Heartland. Don’t forget to check the box that states that the business you are submitting has expressed interest and has agreed to be contacted by Heartland.

Click the Submit button. Once submitted, the referral lead is automatically routed to your Relationship Manager and they will contact the business. You will be able to follow the activity of your lead in your Lead List found under the “Lead Details” tab.

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Lead Details

The “Lead Details” tab displays your Lead List. It shows the date the lead was entered, the business name, status of the lead, the effective date of that status, the name of whom the lead was submitted by, what code it is attached to, and the Heartland Sales Person working the lead. It can be sorted by Lead Date, Status, Submitted By and Code.

Please note:

Lead details are uploaded nightly. Once a lead is entered, it will appear on the lead details dashboard the next day. Any status changes to your leads will also be part of the nightly upload and will be viewable the next day.

The screenshot shows the 'Lead Details' tab in the Heartland system. At the top, there are tabs for 'Payment Overview', 'Payment Detail', 'Portfolio Details', 'Lead Entry', and 'Lead Details'. Below the tabs are filters for 'LEAD DATE' (Dec 2017...), 'STATUS' (All), 'SUBMITTED BY' (All), and 'CODE' (All). Below the filters are three summary statistics: '# of Leads' (8), 'Leads in Progress' (0), and 'Leads Approved' (1). Below these is a 'Lead List' table with columns: Lead Date, Company, Status, Status Date, Submitted By, Code, Heartland Sales Person, and Count.

Lead Date	Company	Status	Status Date	Submitted By	Code	Heartland Sales Person	Count
06/13/2018	Test Lead 2	Qualified	06/13/2018	Tom Kluge	BIZDEV1	Tom Kluge	1
	Test Lead 3	Received	06/13/2018	Tom Kluge	BIZDEV1	Tom Kluge	1
06/06/2018	Test Lead 1	Installed	06/13/2018	Tom Kluge	BIZDEV1	thomas kluge	1
02/14/2018	Pizza Shop 73	Received	02/14/2018	Jon Smith	BIZDEV1	Thomas Kluge	1
12/20/2017	Pizza Stop 4	Received	12/20/2017	Bill Smith	BIZDEV2	Thomas Kluge	1
12/12/2017	Pizza Stop 3	Received	12/12/2017	Ryan Moyer	BIZDEV3	Thomas Kluge	1
12/08/2017	Pizza Stop	Received	12/08/2017	Jill Brown	BIZDEV3	Thomas Kluge	1
	Pizza Stop 2	Received	12/08/2017	Jill Brown	BIZDEV3	Thomas Kluge	1

You can edit the Lead Date column to view a particular date or date range.

This screenshot shows the same 'Lead Details' dashboard as before, but with a date range picker open. A red arrow points to the 'LEAD DATE' filter. The date range picker shows a calendar for December 2017 and January 2018. The 'From' date is set to 12/01/2017 and the 'To' date is set to 10/31/2018. The 'Apply' button is highlighted in green. The summary statistics below the filters show 'Leads in Progress' as 0 and 'Leads Approved' as 1.



Lead Status

Each lead will have one of the listed statuses below:

rePortal Status	Definition
Received	Your referral/lead has been routed to your Heartland partner (RM or SPA) and is awaiting their acceptance.
Contacting	Your referral/lead has been accepted by your Heartland Partner (RM or SPA) and they are actively trying to reach the prospect.
Appointment	Your Heartland partner (RM or SPA) has successfully reached the prospect and has scheduled an appointment to meet with the prospect.
Qualified	Your Heartland partner (RM or SPA) has qualified the prospect, entered initial numbers, and is creating a pricing model/proposal for the prospect.
InProgress-Pricing	Your Heartland Relationship Manager has created a pricing model for presentation to the prospect (either waiting to present or actively negotiating).
InProgress-Contract	Your Heartland Relationship Manager is actively completing the merchant application.
Submitted	Your Heartland Relationship Manager has submitted the merchant application for underwriting approval, enrollment, equipment shipping and installation.
Installed	Merchant is actively processing with Heartland and has submitted their first "batch" of transactions for payment.
Terminated	A shared customer has terminated their agreement with Heartland. (Note: the Status Date will not be updated with the date the account terminated, so terminated accounts will keep their "Installed" date as a final status date.)
Lost	Your Heartland partner (RM or SPA) has determined this opportunity is no longer open for possible sale/install.

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Exporting Reports

Place your cursor over the report and select the arrow next to the report title, then choose Download As and select your preferred file format.

LEAD DATE
Dec 2017...

STATUS
All

SUBMITTED BY
All

CODE
All

of Leads
8

Leads in Progress
0

Leads Approved
1

Lead List Details
METRICS & FILTERS

Download As...

PDF (Portrait)
PDF (Landscape)
XLSX...
CSV (formatted)
CSV (raw data)

Lead Date	Company	Status	Status	Lead Date	Code	Heartland Sales Person	Count
06/13/2018	Test Lead 2	Qualified	06/13/2		BIZDEV1	Tom Kluge	1
	Test Lead 3	Received	06/13/2		BIZDEV1	Tom Kluge	1
06/06/2018	Test Lead 1	Installed	06/13/2		BIZDEV1	thomas kluge	1
02/14/2018	Pizza Shop 73	Received	02/14/2018	Jon Smith	BIZDEV1	Thomas Kluge	1
12/20/2017	Pizza Stop 4	Received	12/20/2017	Bill Smith	BIZDEV2	Thomas Kluge	1
12/12/2017	Pizza Stop 3	Received	12/12/2017	Ryan Moyer	BIZDEV3	Thomas Kluge	1
12/08/2017	Pizza Stop	Received	12/08/2017	Jill Brown	BIZDEV3	Thomas Kluge	1
	Pizza Stop 2	Received	12/08/2017	Jill Brown	BIZDEV3	Thomas Kluge	1

For assistance with reports, please contact the Heartland Business Development team at bizdev@e-hps.com.