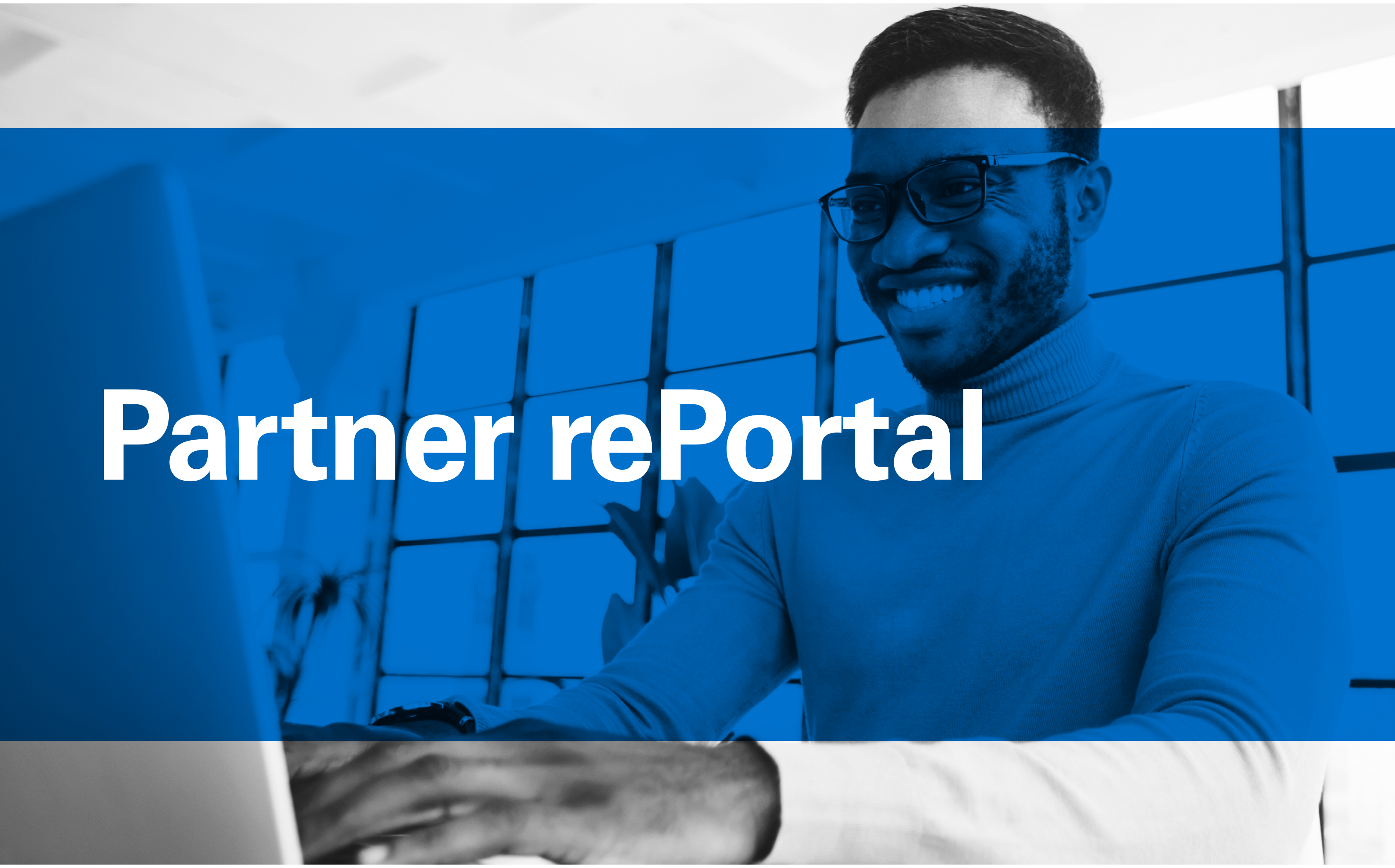
Heartland



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 Referals

Heartland

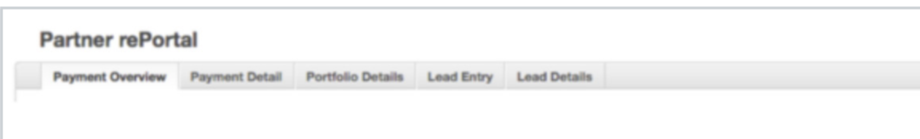
Logging In

Please follow the steps below to generate your login information:

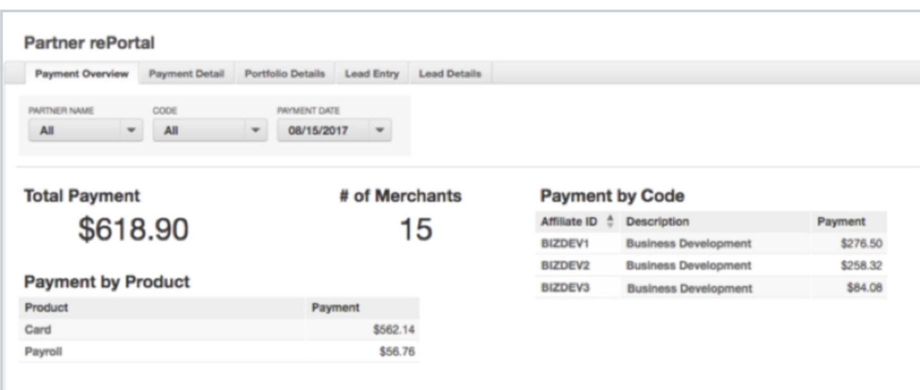
1. Visit https://reports.heartlandpaymentsystems.com/
2. Click "Forgot Password" link under the Password field and enter your email address
3. Click "Reset"
4. You will receive an email from PartnerReporting@e-hps.com with a link to enter a new password. After setting up your new password, navigate back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

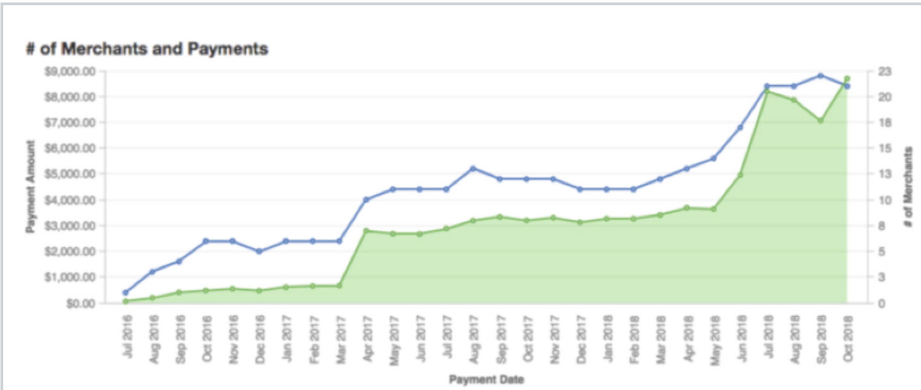


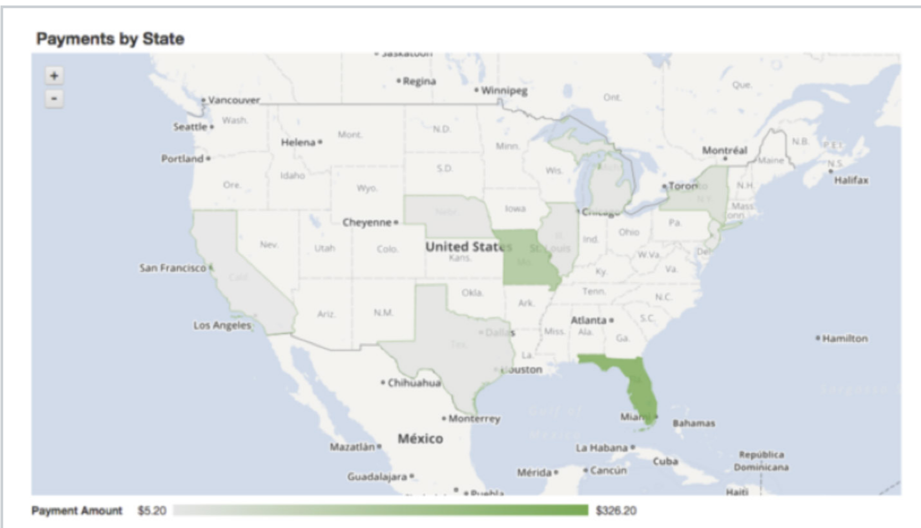
Payment Overview Dashboard
The total payment is broken down by product and affiliate code and is summarized at the top of the Payment Overview dashboard. Note: Payments are dispersed around the 22nd of the month following activity. For example, March activity is paid on approximately April 22nd.



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.

Heartland





Payment Details

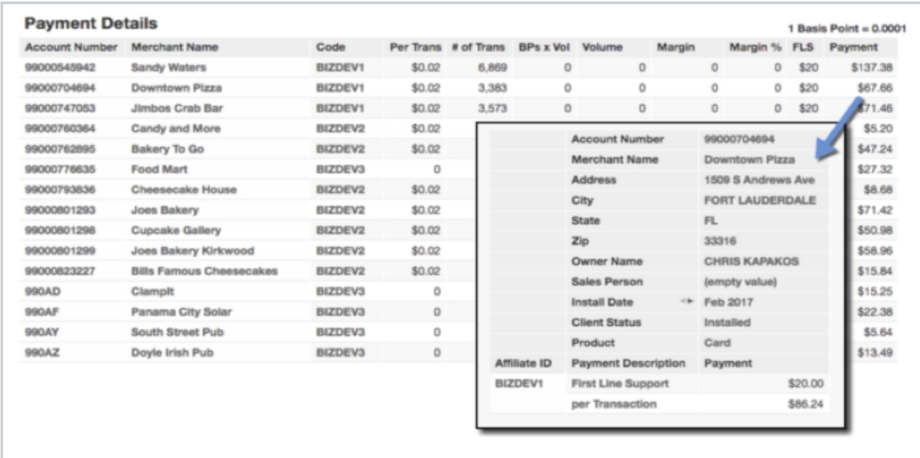
The Payment Details tab shows the breakdown of each of your payments by merchant and provides details on how each payment was calculated.

Payment Details

1 Basis Point = 0.0001

Account Number	Merchant Name	Code	Per Trans	# of Trans	BPs x Vol	Volume	Margin	Margin %	FLS	Payment
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	Jimbos 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	Joes 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	Joes 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	Clampit	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

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



Payment Details

1 Basis Point = 0.0001

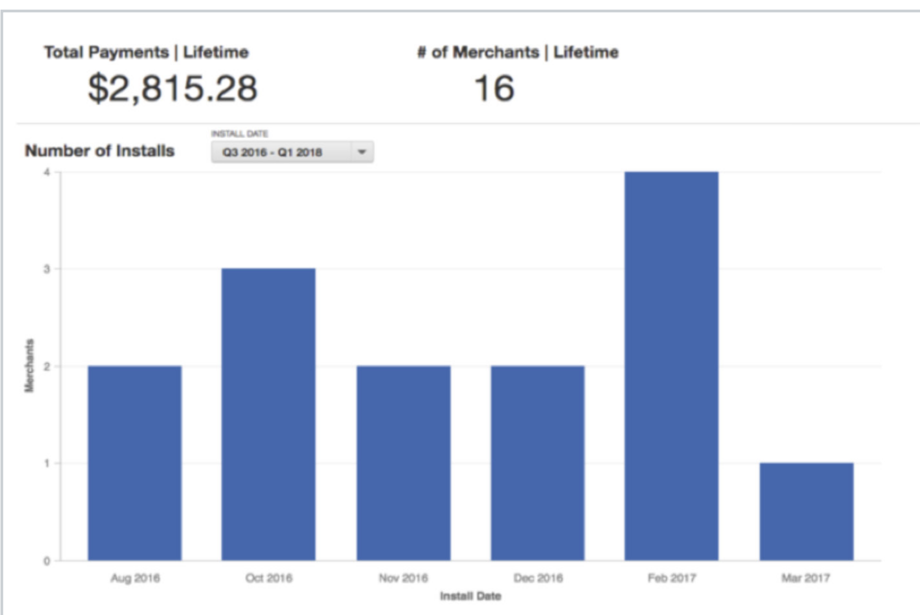
Account Number	Merchant Name	Code	Per Trans	# of Trans	BPs x Vol	Volume	Margin	Margin %	FLS	Payment
99000545942	Sandy Waters	BIZDEV1	$0.02	6,869	0	0	0	0	$20	$137.38
99000704694	Downtown Pizza	BIZDEV1	$0.02	3,383	0	0	0	0	$20	$67.66
99000747053	Jimbos Crab Bar	BIZDEV1	$0.02	3,573	0	0	0	0	$20	$71.46
99000760364	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
99000801298	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	Clampit	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

	Account Number	99000704694
	Merchant Name	Downtown Pizza
	Address	1509 S Andrews Ave
	City	FORT LAUDERDALE
	State	FL
	Zip	33316
	Owner Name	CHRIS KAPAKOS
	Sales Person	(empty value)
	Install Date	Feb 2017
	Client Status	Installed
	Product	Card
Affiliate ID	Payment Description	Payment
BIZDEV1	First Line Support	$20.00
	per Transaction	$86.24

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.

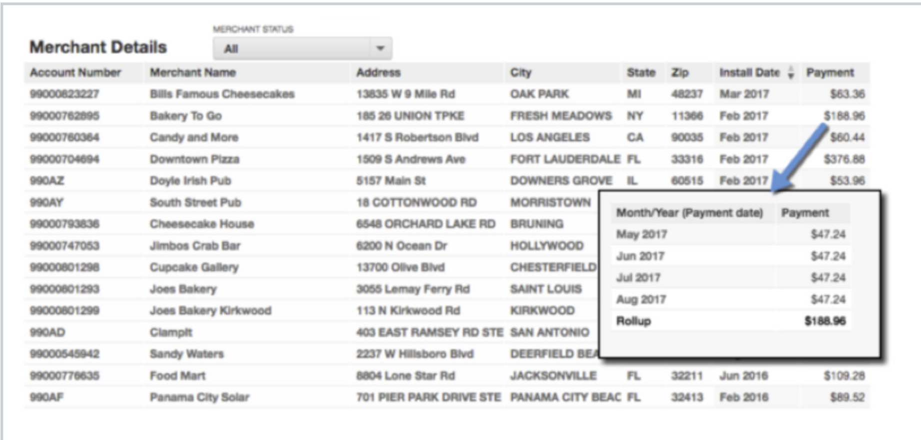
Portfolio Details

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



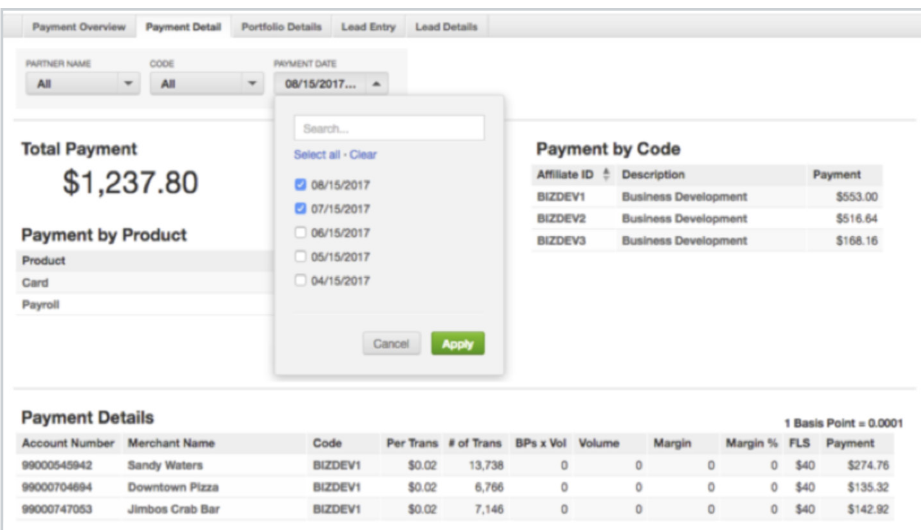
Heartland

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



Filters

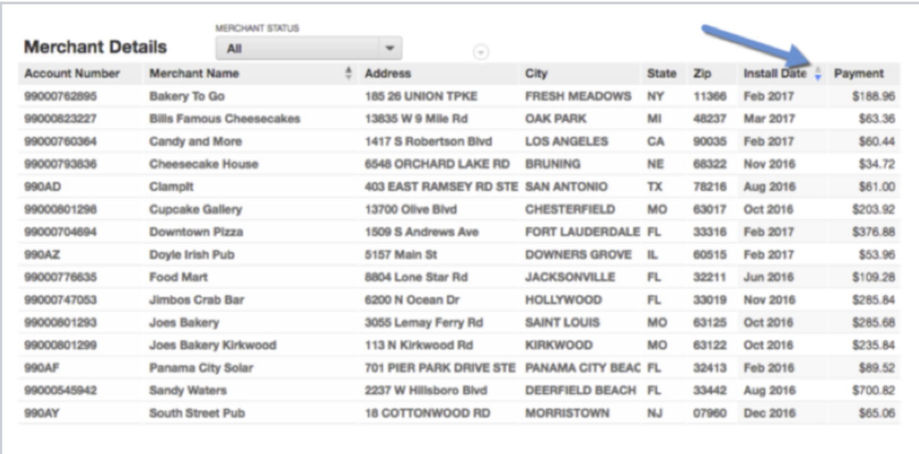
Select from the filter options available on each dashboard. Click apply to activate the filter.



Heartland

Sorting

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

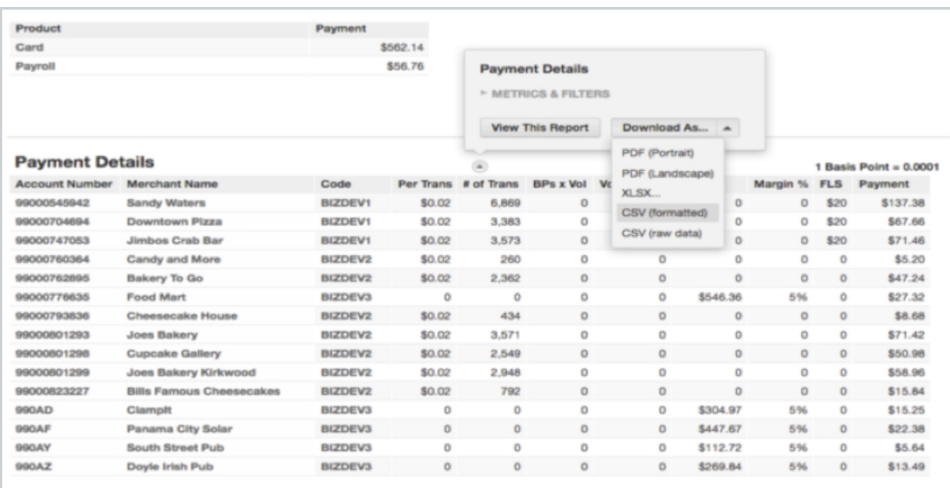


Merchant Details MERCHANT STATUS: All

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
99000801298	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	Jimbos Crab Bar	6200 N Ocean Dr	HOLLYWOOD	FL	33019	Nov 2016	$285.84
99000801293	Joes Bakery	3055 Lemay Ferry Rd	SAINT LOUIS	MO	63125	Oct 2016	$285.68
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 1 Basis Point = 0.0001

Account Number	Merchant Name	Code	Per Trans	# of Trans	BPs x Vol	Vo		Margin %	FLS	Payment
99000545942	Sandy Waters	BIZDEV1	$0.02	6,869	0		0	0	$20	$137.38
99000704694	Downtown Pizza	BIZDEV1	$0.02	3,383	0		0	0	$20	$67.66
99000747053	Jimbos Crab Bar	BIZDEV1	$0.02	3,573	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	Joes 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	Joes 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	Clampit	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

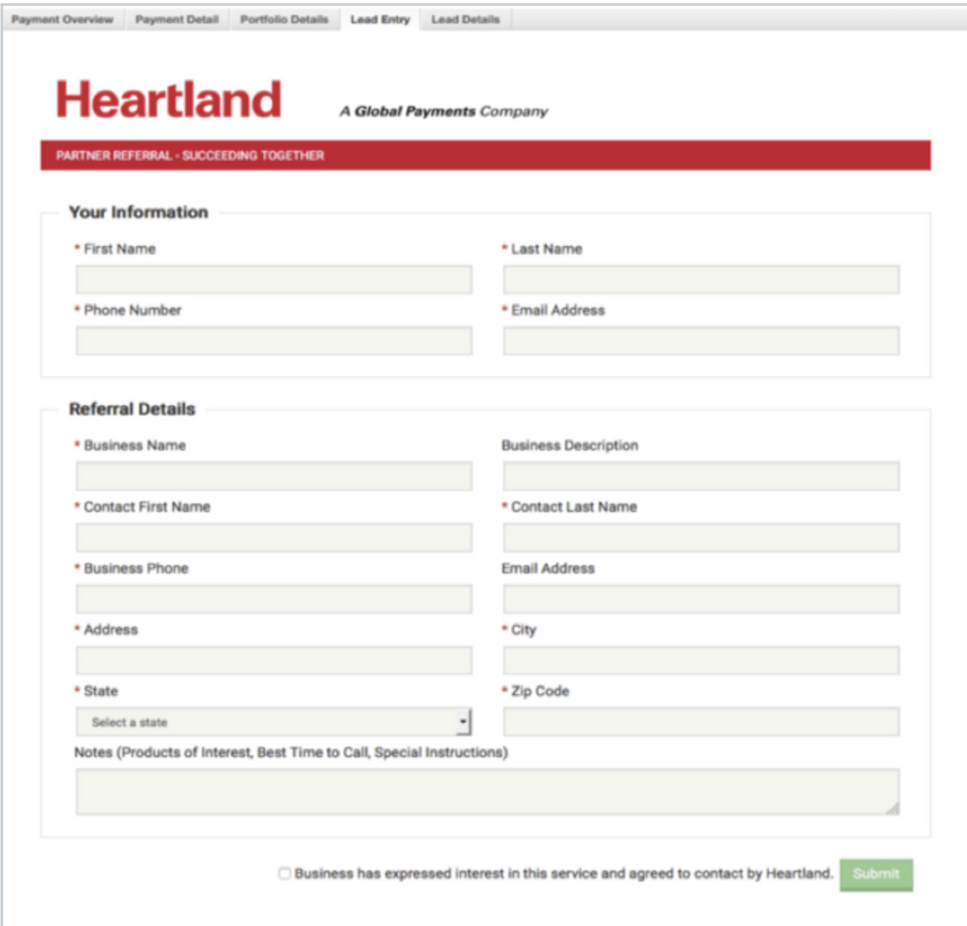
For assistance with the Partner rePortal, please reach out to your Heartland representative or email our Business Development Operations team at bizdev@e-hps.com.

Heartland

How to Submit/Track Referrals

Lead Entry

To enter a lead, navigate to the Lead Entry tab



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.

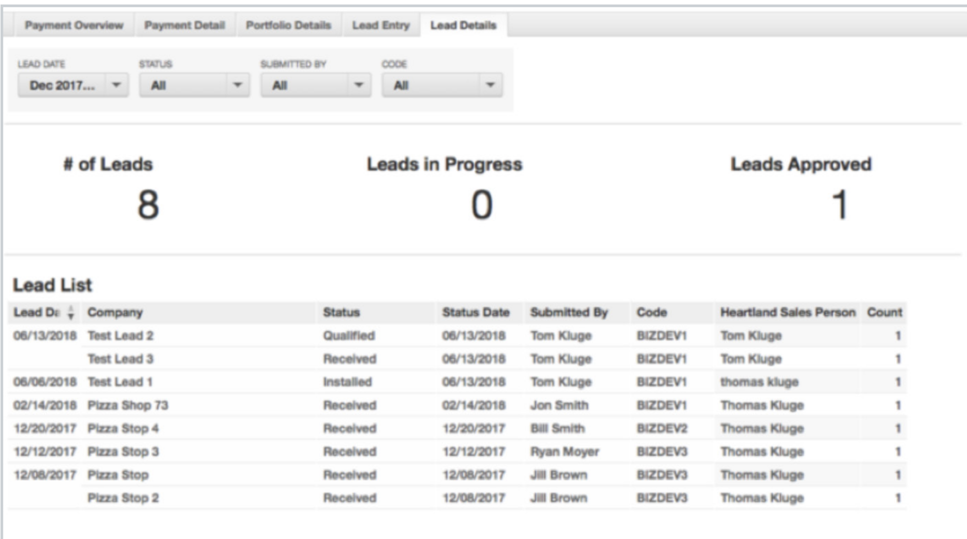
Click the Submit button. Once submitted, the referral lead is automatically routed to your Relationship Manager and they will contact the business. You will be able to follow the activity of your lead in your Lead List found under the “Lead Details” tab.

Heartland

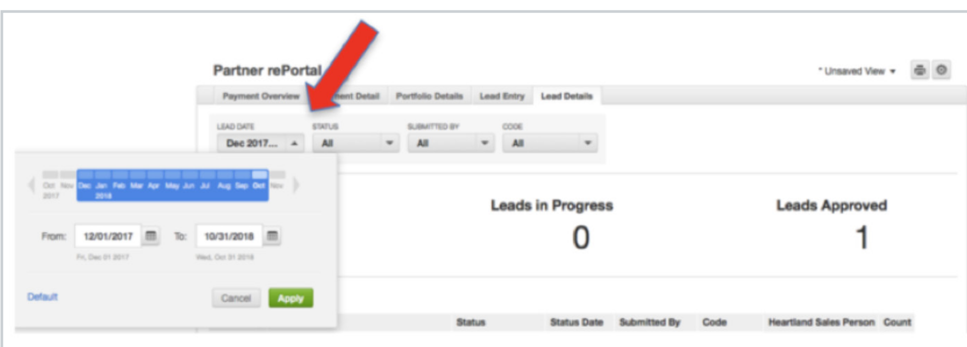
Lead Details

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.



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



Heartland

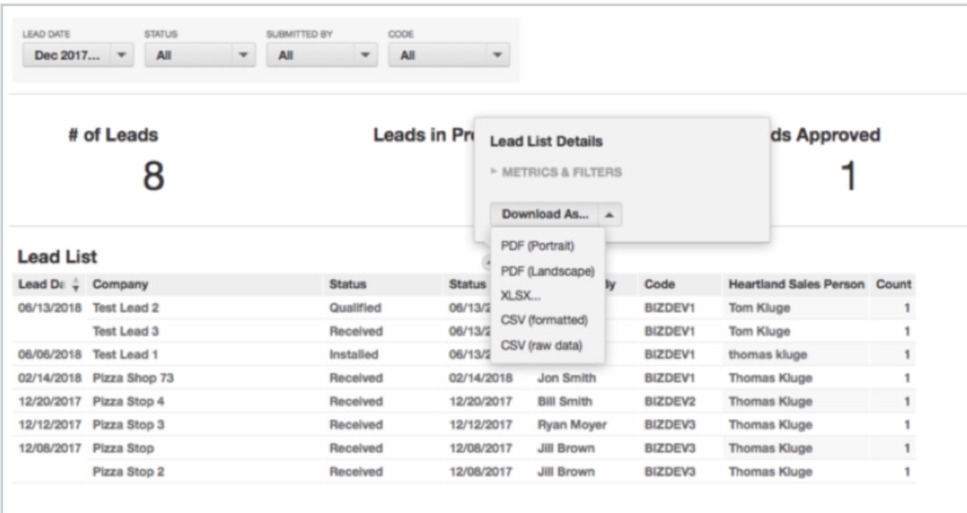
Lead Status

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.

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.



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