

Card Processing Service Order – Request for Information - (FILLABLE)

Name of business: _____

Business Address: _____

Business Phone Number: _____

Exact Legal Business Name: _____

Legal Entity, choose one: Sole Proprietor Corporation Not-for-Profit LLC

If LLC applies, check type: Partnership Single Entity Corporation

If your Merchant Credit Card Statements should be sent to another address, please provide:

Date Business started accepting credit card: _____ EIN: _____

OWNER INFORMATION:

Check here if you prefer to be sent a secure email link to complete the information requested in this section.
If yes, you may skip the "Owner Information" section, but please complete the rest of this application.

Owner's full legal name: _____

Full Home Address: _____

Length of time you have lived there: _____

Home Number: _____ Cell Number: _____

Email Address: _____ Percent % of Equity: _____

Date of Birth: _____ Social Security Number: _____

Yes No - Is viewing your credit card processing and other funding data and reports online important to your business? We have a free funding analytics portal (Heartland "Infocentral") for you.

Who is or will be, doing your credit card processing, other than the owner?

Full Name: _____ Phone Number: _____

Title: _____ Email: _____

Check here if you allow the above person to manage the funding portal for your business.

Do you currently integrate your credit card processing with software?: Yes No

If yes, description: _____

Do you currently accept credit cards online?: Yes No Via your website?: Yes No

Does your virtual terminal run through a computer?: Yes No Want to start?: Yes No

Do you have an existing credit card machine that accepts chip cards?: Yes No

What is the make and model number of your current credit card machine(s)? _____

Can your credit card machine run over a phone line or via cable (Ethernet-high speed)? Yes No

About how many feet is your internet router to where you will run credit card transactions?: _____

Interested in a swap/upgrade of your old credit card machine for a new fast chip enabled machine?

Yes No

If you need a Chip-enabled credit card machine would you prefer to pay installments (2-6 months), at no cost?

Yes No If yes, how many months?: 2 3 4 5 6

If you have a credit card machine to go over high speed cable (cat5/Ethernet): Which do you have?

Please choose one: Static IP Address Dynamic IP address?

If your have a Static IP Address, then the following is required (which you can get from your IT person or phone carrier) Regardless, you will need to have an open port on your internet router.

Static IP Address provided by the internet service provider (*NOT from the server computer*):

- Static IP Address: _____ • Subnet Mask: _____
- Gateway IP: _____ • DNS IP: _____

Heartland can set up your credit card transactions to process automatically for you. (Ex: At the close of your business day) What time daily should Heartland auto-batch out your credit card transactions?: _____

What is your time zone: _____

How do you want your fees taken out when you have credit card transactions? (*Either way, no cost*)

Check one: Daily Monthly

What else is most important to you about your credit card processing? _____

Wants: Take credit card acceptance through an app on smart phone or tablet (We have a **FREE** app. It works great as a primary or back up to process payments.) Please check boxes accordingly:

- Yes No - Mobile card processing for your smart phone and tablets
- Yes No - Mobile Card Reader (\$60 for any smart phone or tablet)
- Yes No - Mobile Swipe with Chip-enabled Reader (\$170 for any smart phone or tablet)
- Yes No - Heartland's free online auto-debit or recurring billing. (*It is a secure way to accept Credit Card and ACH payments online securely from your computer*).
- Yes No - Heartland's **free** online auto-debit point-of-sale (POS) system? (*with Heartland's "Portico" virtual terminal, you can process payments securely from laptop or PC with internet access*)
- Yes No - Interested in Heartland Lending? (*Starting at 4.90%*)
- Yes No - Interested in Heartland Payroll Services / tax filing or without HR op special offers?
- Yes No - Interested in Heartland's E-Commerce on your website?
- Yes No - Interested in Heartland's website bill payment portal or invoicing and auto deposit?
- Yes No - Interested in Heartland's email marketing or gift / loyalty cards or invoicing portal?

Which one? _____

Owner's Home Business - Where do you want us to ship your credit card equipment?

When do you want to complete your setup with Heartland?: _____

Thank you, Jennifer of Heartland