

How To Add, Edit, and Customize New Online Applications Bankcard Pros Account Tracking Software

The purpose of adding, editing, and customizing the online application in the software is so the pages, sections, and all fields of the online User App in the system will match the EXACT same order as your PDF merchant application paperwork.

This makes the process easy and simple when filling out an online application in the software because the order of the fields will be in the same order.

This is one of the few time consuming and complicated tasks of getting your software configured so you can start using the online applications in the software. This process must be completed in order for the software to work best for your business needs. You will need to go through and complete all steps of the setup and configuration checklist before you add users and start using the software. You will receive a copy of the checklist via email when your software is installed.

Almost all sales offices nationwide are using multiple banks/processors when submitting their merchant account applications for approval. Because of this fact, Bankcard Pros software allows you to add, edit, and customize multiple online user apps in the system. You can add and customize an unlimited number of apps!

As a bonus feature, and to save your company time from customizing your own online applications within the software, the following bank/processors are already customized in the software including all fields and PDF documentation:

1. AMS - Allied Merchant Services
2. Banctek Solutions
3. Chase Paymentech Solutions
4. Cynergy Data Merchant Services
5. Dynamic Payment Solutions
6. Elite Bankcard Network
7. EVO Merchant Services
8. First American Payment Systems
9. First Data Omaha
10. First National Bank of Omaha
11. Humboldt Merchant Services
12. iPayment
13. IRN Payment Systems
14. MPC Merchant Bankcard Application
15. MSI Merchant Services – Regular
16. Newtek Electronic Payment Processing
17. NOVA
18. NPC National Processing Corporation
19. Online Data Corp / Wells Fargo Bank, NA
20. Pivotal Payments / Bank of America, NA
21. Pivotal Payments / Chase Paymentech
22. POS Card Systems / Public Agency App
23. PRI / TransFirst (CharegeItPro)
24. Sage Payment Solutions

25. Spectrum Merchant Services
26. Total Merchant Services - MO/TO App
27. Total Merchant Services - Standard Retail
28. U.S. Merchant Systems
29. United Bank Card, Inc.

If you need to integrate new PDF documents into the software and map the fields with the fields on the online application, you need to email your PDF documents to Bankcard Pros staff and we will add them to the software for you, for an additional fee of \$275 per PDF document, up to 3 pages. For more pages, we will review your PPF documents and provide you a price quote.

To get started, when you login to the software as an administrative user, go to the setup/configuration page <https://www.bankcardpros.net/configuration.php>

PLEASE NOTE: All URL weblinks below are links to the direct page where you can manage each item below. However, if you are an administrative user, you can access all links on the SETUP/CONFIGURATION page. Also, the links below state <https://www.bankcardpros.net/>..... you need to simply replace the “bankcardpros.net” portion of the URL of the domain name the software is installed for your business.

Next, go to the 4th section called Set-Up and Configure the Online Application System - User & Merchant Apps, and click on the “Banks/Processors” link and it will take you to this page https://www.bankcardpros.net/syslists.php?cmd=list_processors

Before you can add, edit, or customize a new online application, you must first add a bank/processor name to the system. As an example, we will add Total Merchant Systems. This processor has 2 PDF merchant applications, so we will be customizing 2 online applications into the software.

TMS has 2 PDF merchant applications, so we will add 2 bank/processores on this page https://www.bankcardpros.net/syslists.php?cmd=list_processors

- Total Merchant Services - MO/TO App
- Total Merchant Services - Standard Retail

For these 2 names, you will need to check the check box that says “Enable” and also click on the radio button to designate one of these 2 apps as the default bank/processor. When a user clicks on the Submit User App gray button, the default bank/processor app will show up as default.

Now that we have added the bank/processor names to this page, we will go to the next step. We will now go to the setup/configuration page and go to Edit User Apps on this page https://www.bankcardpros.net/syslists.php?cmd=list_apppages

On this page, it shows the PAGES of all online applications that you can customize, reorder the pages, enable/disable the page, edit sections, and edit fields. You will notice the drop down menu field box shows “Default Bank/Processor.” You would simple choose the bank/processor name in the drop down menu and then you can start customizing the online application pages, sections, and fields.

If you cannot find the bank/processor name in the drop down menu, that means you did not enable the bank/processor name on the bank/processor setup page.

Pages available to use in the online application system:

1. Get Started
2. Service Request
3. Merchant Info
4. References
5. Rates and Fees
6. Site Survey
7. Shipping/Supplies
8. Additional Card Acceptance
9. Equip Options
10. Merchant Info (Paymentech Only)
11. Terminal Input Request (Paymentech Only)
12. Site Survey (Paymentech Only)
13. Gift Card Rates
14. Electronic Check Service Application
15. Merchant App Welcome Page

These pages are all hard coded and cannot be changes or deleted. You can only add, edit, or disable the sections and fields within all pages.

Explanation of pages available and how they work:

1. Get Started – This page is hard coded and cannot be deleted, but you can skip this page and disable it. This page is primarily used for system information like user name, user ID#, bank/processor name, etc.

2. Service Request - This page is hard coded and cannot be deleted, but you can skip this page and disable it. For every application, each user is able to enroll the merchant in additional products or services other than credit card processing, such as bankcard types, merchant status, service enrollment bonuses (if you pay bonus commissions to your sales reps), additional card acceptance services (new or existing), and you can add a list of other vendors such as gift cards, check processing, cash advance, prepaid, authorizenet, equipment lease vendors, and so on.

Service enrollment bonuses can be customized by going to this page

https://www.bankcardpros.net/bonus_manager.php?s=p&uid=

There is a link to this page in the setup/configuration page under this section **Set-Up and Configure User Profits and Costs**

Additional card acceptance service items can be customized by going to this page

https://www.bankcardpros.net/syslists.php?cmd=list_addservices

There is a link to this page in the setup/configuration page under this section **Set-Up and Configure the Online Application System - User & Merchant Apps**

3. Merchant Info - This page is hard coded and cannot be deleted. It is the main page of the online application system where you add fields regarding the merchant contact information, owner/officer information, trade references, bank info, and so on.

Certain fields are required to use because the system will use the values of those fields within the STATUS section of the software. For each online application, you will need to use the MERCHANT TYPE field located at this link:

https://www.bankcardpros.net/syslists.php?cmd=list_bustypes

4. References – This page allows you to add, edit, or disable fields regarding trade references, based on what is on your PDF merchant application paperwork.

5. Rates and Fees – This page allows you to add, edit, or disable fields, as well as setting up all your rates and fees items that are on your PDF merchant application page. To setup your rates and fees items, you need to go to the setup/configuration page, and then go to the **Rates/Fees Categories** page here:

https://www.bankcardpros.net/syslists.php?cmd=list_fees

After you add all your rates and fees items, you will need to add default rates and fees values that are sorted by bank/processor, and sorted by merchant type:

https://www.bankcardpros.net/merchant_fees.php?s=p&uid=

Setting up rates and fees items and default values may be complicated to understand, so please contact Bankcard Pros staff for assistance with this section.

6. Site Survey - This page allows you to add, edit, or disable fields regarding site survey questions, and based on what is on your PDF merchant application paperwork.

7. Shipping/Supplies – This is a customized, hard-coded system page that will allow users to order starter supplies, choose shipping options, choose where to have the equipment shipped to, choose installation, lease verification, and customer training options, and add special notes. You are able to manage and customize the starter supplies, shipping options, and installation and training options as follows:

You can manage and customize your starter supplies on this page within the setup and configuration section:

https://www.bankcardpros.net/ssup_manager.php?s=p&uid=

You can manage and customize your shipping options on this page within the setup and configuration section:

https://www.bankcardpros.net/shipcost_manager.php?s=p&uid=

The software is installed with all the shipping options already programmed as default to save you time, you would only need to add your shipping costs values.

You can manage and customize your installation and training options on this page within the setup and configuration section:

https://www.bankcardpros.net/syslists.php?cmd=list_training_options

8. Additional Card Acceptance - This page allows you to add, edit, or disable fields regarding additional card acceptance such as American Express, Discover, JCB, and/or Diners, and based on what is on your PDF merchant application paperwork.

9. Equip Options – This is a customized, hard-coded system page that will allow users to choose equipment items, pay options which include purchase, lease, reprogram, free, rental, swap, or trade-in, add specific equipment details under equipment summary sections, add fees collected, and add payment option details like leasing information.

You can manage and customize your equipment categories on this page within the setup and configuration section:

https://www.bankcardpros.net/syslists.php?cmd=list_equiptypes

You can manage and customize your equipment items and pricing on this page within the setup and configuration section:

https://www.bankcardpros.net/syslists.php?cmd=list_equips

You can manage and customize your equipment warranty items on this page within the setup and configuration section:

https://www.bankcardpros.net/syslists.php?cmd=list_warrantyoptions

You can manage and customize your leasing vendors on this page within the setup and configuration section:

https://www.bankcardpros.net/syslists.php?cmd=list_vendors_lease

You can manage and customize your leasing factors on this page within the setup and configuration section:

https://www.bankcardpros.net/user.php?s=p&cmd=edit_cost&uid=

If they choose Equipment Trade-In as the Pay Option, you can manage and customize your trade-in options on this page within the setup and configuration section:

10. Merchant Info (Paymentech Only) – DO NOT USE THIS PAGE - This page is used by the Paymentech online application only, and will never be used for any other app, so you can disregard this section.

11. Terminal Input Request (Paymentech Only) – DO NOT USE THIS PAGE - This page is used by the Paymentech online application only, and will never be used for any other app, so you can disregard this section.

12. Site Survey (Paymentech Only) – DO NOT USE THIS PAGE - This page is used by the Paymentech online application only, and will never be used for any other app, so you can disregard this section.

13. Gift Card Rates – DO NOT USE THIS PAGE - This page is used by the Valutec Online Application, so you will never use this page.

14. Electronic Check Service Application - DO NOT USE THIS PAGE - This page is used by the Check Processing Vendors Online Application, so you will never use this page.

15. Merchant App Welcome Page – This is used for editing and customizing the Merchant Application. You can edit the content of this welcome page here

https://www.bankcardpros.net/site_config.php?cmd=merchapp_form

You can view the merchant application link here

https://www.bankcardpros.net/app_manager.php?cmd=add_app&app_id=NEWMERCH

To add, edit, delete, manage, and customize unlimited Online Merchant Applications, you can do so in the setup/configuration section, using this link EDIT MERCHANT APPS:

https://www.bankcardpros.net/syslists.php?cmd=list_merchprocessors

You can customize the content of the merchant application welcome page message, requirements, FAQ's, Glossary, Fees Explanation, Agreement and Terms, Contact Information, and Success page content, on this page:

https://www.bankcardpros.net/site_config.php?cmd=merchapp_form