Bankcard Pros CRM - Pre-Setup Questionnaire

Please answer the following questions in order to determine which CRM software features your company will use. This will help you determine which setup and configuration features to focus on in the setup process, and guide you in disabling features you do not want to use.

Please answer the following questions about which features you want to use and setup, and choose which features you want to disable:

Question #1: Do you want to utilize the recruiting section to receive new job applicant forms and resumes for hiring sales agents and sub-agents?

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ Edit the forms options page located on the home page
❐ Design a new logo to upload to the recruiting form page at /apply
❐ Edit the content of the recruiting form located on the home page

Question #2: Do you want to Import and view merchant daily transaction reports and daily batch settlement reports, transaction statistics, and automatic generated merchant statement invoices

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ There is no setup or configuration required, just import daily transaction and batch reports on the setup/configuration page on a weekly or monthly basis

Question #3: Do you want to Build and customize online forms, questionnaires, and surveys

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ You will need to edit the forms options on the home page
❐ You will need to go to the Edit/View forms page and there you can add, edit, delete new forms and all forms options, as well as customize the form layout and appearance and fields

Question #4: Do you want to Manage and track statistics for referral partner leads

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to add new referral partner users in the system

❒ You can view referral partner statistics on the users section under Referral Network section in the Quick Links section on the left of the CRM

Question #5: Do you want to Utilize the comprehensive leads and telemarketing system for call centers with inside sales reps and telemarketers. Access sample cold calling and telemarketing sales pitches to use when speaking to prospects

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to edit the lead status levels

❒ You will need to edit the lead source names

❒ You will need to edit the letter templates in the leads section

❒ You will need to enable or disable all the options that appear on the lead summary page, and you do this on the user access rights page within the setup/configuration section

❒ You will need to add leads 1 at a time, or import mass leads from an excel format document, and then assign leads to different sales rep or telemarketing users

❒ You will need to add telemarketer users, and in the telemarketer user profile, you will need to assign sales rep users to the telemarketer, and choose what lead status levels the telemarketer will have access to.

Question #6: Do you want to Send letter templates to prospects and active clients via email or fax

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to edit the letter templates in the leads section, or you can add new templates and allow all users to use these templates

Question #7: Do you want to Manage online training curriculum program for new sales agents, as well as manage and track progress, steps completed, and scores

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to customize, add, edit, or delete training modules which is located in the USER section

- ❒ You will need to add or edit new training modules
- ❒ You will need to edit the training module options

Question #8: Do you want to Board new merchant accounts into the system so you can track underwriting status, view merchant contact information, and manage existing clients activity, history, paperwork, and more.

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ Customize the status level groups
- ❒ Customize the status levels

Question #9: Do you want to Generate merchant application documents with fields already populated on PDF docs that you can view, download, print, save to your desktop, or email to your merchants

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ Create new bank/processor names in the setup/configuration section
- ❒ Integrate new PDF documents into the CRM software
- ❒ Customize and build the online application so fields will match fields in your PDF doc
- ❒ Map fields in the online application to map to the PDF document so fields will populate

Question #10: Do you want your employees, merchants, and outside sales reps to receive daily status report "email notifications" for all merchant accounts boarded into the system?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ Edit the content of all email notifications in the setup/configuration section
- ❒ Choose recipients for all email notifications
- ❒ Enable or disable email notifications to send emails to recipients

Question #11: Do you want to Utilize 6 different rate quote calculators which include Merchant Cash Advance Comparison Calculator, Comprehensive 3-Statement Cost Comparison & Rate Quote Proposal, Interchange Rate Quote Proposal, IC Plus. 2-Tier, 3-Tier, and 4-Tier Cost Comparison Quote, Merchant Online Q: Application with Special Rates and Fees Quote, and the Gift Card Return-On-Investment (ROI) Calculator

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ There are no setting in the setup/configuration section

❒ If you want to use the Interchange Rate Quote Calculator, you will need to customize the settings for add items, import, organize, merchant types pages within the rate quote calculator

❒ You will need to import the most recent interchange items and rates provided by Visa, Mastercard, and Discover. We can provide these reports in excel format as well.

Question #12: Do you want to Order and track the status of business card orders for employees and sales reps

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ If yes, you will need to edit the Business Card Options page within the Support Section.

❒ You will need to upload default business card samples

Question #13: Do you want to Send out birthday wishes to your vendors, leads, sub-agents, and your existing merchant accounts

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ All you need to do is edit and customize the content of the email noitification for birthday wish features

Question #14: Do you want to Access, view, and download forms, training materials, and marketing materials using the document download center

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to add new categories or departments in the document download library

❒ You will need to add new documents within each department in the document download library

Question #15: Do you want to Utilize and manage all your contacts with the address book

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ You will be able to add, edit, or delete address book categories
❐ You can import contacts into the address book

Question #16: Do you want to Keep track of all equipment and software inventory, costs, pricing, and inventory on-hand

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the Equipment Section of the setup/configuration section:

❐ You can edit sales tax % by state
❐ You can edit and manage equipment trade-in options
❐ You can manage and add new equipment items in the inventory section
❐ You can edit and customize equipment categories
❐ You can add, edit, delete, and customize new equipment items
❐ You can add, edit, delete, and customize new equipment costs
❐ You can add, edit, delete, and customize equipment manufacturers
❐ You can add, edit, delete, and customize equipment location/warehouses
❐ You can add, edit, delete, and customize equipment options and prompts
❐ You can add, edit, delete, and customize equipment communication options
❐ You can add, edit, delete, and customize equipment vendors
❐ You can add, edit, delete, and customize equipment warranty options
❐ You can add, edit, delete, and customize equipment pay options

Question #17: Do you want to Send out news articles and announcements to vendors, sub-agents, merchants

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ There is no setup and configuration required to send out news articles
❐ You can add, edit, delete, and customize new news articles in the SUPPORT section

Question #18: Do you want to Schedule training conference call events for you and your sub-agents

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You can add new EVENTS in the home page in the SCHEDULING section

Question #19: Do you want to Search the general knowledgebase for answers and training on various topics

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to add new knowledgebase categories in the SUPPORT section

❒ You will need to add new knowledgebase articles within each of the categories in the SUPPORT section

Question #20: Do you want to Submit trouble tickets for receiving support for you, your sub-agents, or your existing merchant accounts

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You will need to edit and customize the trouble ticket options in the SUPPORT section

❒ You will need to edit and customize the trouble ticket issues in the SUPPORT section

❒ You will need to edit and customize the trouble ticket statuses in the SUPPORT section

❒ You will need to edit and customize the trouble ticket priorities in the SUPPORT section

Question #21: Do you want to Export mailing lists so you can mail out letters or post cards to leads or existing merchants

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ There is no setup or configuration required for this feature

Question #22: Do you want to Create email marketing campaigns and send out marketing emails to your leads or existing merchants

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ There is no setup or configuration required for this feature

❐ You will use the Upselling Leads feature within the Leads section

Question #23: Do you want to Keep track of your sales statistics with daily, weekly, monthly, and yearly reports

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ There is no setup or configuration required for this feature

❐ You will view these statistics in the STATUS section and the PROFITS section on the top of both of these sections

Question #24: Do you want to View daily sales and motivational quotes

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ You can edit, add, delete sales motivational quotes in the setup/configuration page, as well as disable quotes, and change the speed the quotes change to next quotes viewing times.

Question #25: Do you want to Keep track of hourly employees, sub-agents, or telemarketers by utilizing the time and attendance time clock features

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❐ There is no setup or configuration required for this feature

❐ Users can clock in and clock out of the time sheet by clicking on the “Time Sheet” gray button that appears on the top of each page of the CRM software.

Question #26: Do you want to Schedule appointments between you and your vendors, sub-agents, employees, or business partners

❐ YES ❐ NO ❐ Maybe at a later time ❐ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ There is no setup or configuration required for this feature

❒ You can add, edit, delete tasks, reminders, appointments, events, and holidays in the EVENTS SCHEDULING section on the home page of the CRM software

Question #27: Do you want to Schedule tasks and reminders between you and your vendors, sub-agents, employees, or business partners

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ There is no setup or configuration required for this feature

❒ You can add, edit, delete tasks, reminders, appointments, events, and holidays in the EVENTS SCHEDULING section on the home page of the CRM software

Question #28: Do you want to Schedule training events between you and your vendors, sub-agents, employees, or business partners

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ There is no setup or configuration required for this feature

❒ You can add, edit, delete tasks, reminders, appointments, events, and holidays in the EVENTS SCHEDULING section on the home page of the CRM software

Question #29: Do you want to Schedule seasonal holidays and vacations for your vendors, sub-agents, employees, or business partners

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ There is no setup or configuration required for this feature

❒ You can add, edit, delete tasks, reminders, appointments, events, and holidays in the EVENTS SCHEDULING section on the home page of the CRM software

Question #30: Do you want to View your monthly residual report details and profit from each merchant account as well as track over 10 different bonus and commission options available on the User Invoice for each new merchant account boarded

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ You can access, view, and customize residual reports in the PROFITS section
- ❒ You will need to add new vendors
- ❒ You will need to customize the fields for each new vendor residual report
- ❒ You will need to import residual reports in the system on a monthly basis

Question #31: Do you want to pay your sales reps or employees bonuses for each merchant account submitted?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ You must enable/disable this feature in the setup/configuration page
- ❒ You must customize the default bonuses in the PROFITS AND COSTS section of the setup/configuration section, and when you add new users to the CRM, the system will apply these bonus defaults to each new user automatically

Question #32: Do you want to pay your sales reps or employees performance bonuses for each merchant account submitted?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ You must enable/disable this feature in the setup/configuration page
- ❒ You must customize the default performance bonuses in the PROFITS AND COSTS section of the setup/configuration section, and when you add new users to the CRM, the system will apply these performance bonus defaults to each new user automatically

Question #33: Do you want to pay your sales reps or employees lease bonuses for each merchant account submitted?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

- ❒ You must enable/disable this feature in the setup/configuration page
- ❒ You must customize the default lease bonuses in the PROFITS AND COSTS section of the setup/configuration section, and when you add new users to the CRM, the system will apply these lease bonus defaults to each new user automatically

Question #34: Does your company lease equipment? Do you want to pay your sales reps or employees a % of lease funding for each lease account submitted?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You must enable/disable this feature in the setup/configuration page

❒ You must customize the default bonuses in the PROFITS AND COSTS section of the setup/configuration section, and when you add new users to the CRM, the system will apply these bonus defaults to each new user automatically

Question #35: Do you want to pay your sales reps or employees volume bonuses for each merchant account submitted?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You must enable/disable this feature in the setup/configuration page

❒ You must customize the default volume bonuses in the PROFITS AND COSTS section of the setup/configuration section, and when you add new users to the CRM, the system will apply these volume bonus defaults to each new user automatically

Question #36: Do you want to pay multiple sales reps or employees setup fees for each merchant account submitted?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ You must enable/disable this feature in the setup/configuration page

❒ You do not need to customize default setup fees, as these are added in the online app by each user, based on how much setup fees they charged their merchants.

Question #37: Do you want to use RSS News Feeds on the home page?

❒ YES ❒ NO ❒ Maybe at a later time ❒ Disable?

If yes, you will need to configure the following settings within the setup/configuration section:

❒ The RSS News Feeds can be viewed on the home page when you login to your CRM

❒ You will need to add RSS News Feed links within the setup/configuration section