Bankcard Pros CRM Account Tracking Software

www.bankcardpros.com | www.bankcardpros.net

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Frequently Asked Questions (FAQ's)

Q: Where can I download all your training and support materials?

Our Site http://bankcardpros.com/html/training_videos___manuals.html

YouTube: http://www.youtube.com/user/rhendrix76?feature=mhum#g/u

Q: Where can I download and view training videos?

http://bankcardpros.com/html/training_videos___manuals.html

Q: What are your support options?

http://bankcardpros.com/html/support_options.html

Q: How can we get updates on new features you add to your CRM software?

http://twitter.com/#!/bankcardpros

http://creativevisionstudio.blogspot.com/

Q: If I have any questions, what are your procedures to receive support?

You must email our support staff with your questions, and we will respond to your emails. You can email us at training@bankcardpros.com. In order to receive training or support, your company must be paying the monthly support and training fee per your contract agreement.

Q: What is Bankcard Pros CRM Account Tracking Software?

Developed exclusively for the payment processing industry for small, medium, or large ISO/ISI sales offices, Bankcard Pros CRM Account Tracking Software empowers your business to sell, board, track, deploy merchant account services, and process and ship equipment without costly delays and helping reduce costs. Your entire sales team can instantly access key contact and merchant information, manage and prioritize activities, and track all merchant-related communications so you can grow more productive business relationships. Bankcard Pros CRM Account Tracking Software improves your ability to deliver information and services timely and effectively. With Bankcard Pros CRM Account Tracking Software, you can access over 1,000 powerful features that provides your sales force with software that is easy to use, fast, secure, and all this for the low cost of getting your office up and running. The most popular features with Bankcard Pros CRM Account Tracking Software are the online training curriculum, recruiting and hiring system, online forms builder system, referral partner network system, the leads and telemarketing system, 5 different rate quote calculators, online account status system, residual reporting system, and more.

You can view the top 30 features of the software here:
http://bankcardpros.com/html/top_30_features.html

And you can view the complete list of software features here:
http://bankcardpros.com/html/complete_feature_list.html

Q: What are the major components of Bankcard Pros CRM Account Tracking Software?

The software provides the following features:

- Merchant account boarding and tracking with 16 status levels + real-time reports
- Ability to customize status levels, user types and access rights, lead statuses, and online apps
- Email notifications keeps your sales force up to date within minutes of status changes
- PDF generated applications for merchant accounts, leasing, and other vendors
- Commission reports and invoices details up-front bonuses and lease funding
- Multi-level user system, user access rights controls, & multi-level residual profit sharing
- Administrative, technology, underwriting, and customer service user accounts
- Sales office, sales manager, sales rep, and telemarketer user accounts
- Referral agent, referral partner, and trade association partner user accounts
- Comprehensive leads & telemarketing system able to convert leads to live apps
- Rate quote and cost analysis proposal + Interchange rate quote calculator
- Recruiting and new hire lead inquiry and status system
- Trouble tickets, knowledgebase, news alerts, document download library
- Equipment help section with ability to attached docs to KB articles and Trouble Tickets
- Merchant database advanced search tools
- Email system allows users to communicate with administrators
- Send out Birthday wishes to users, merchants, leads, address book contacts
- Export mailing list reports for users, merchants, leads, and address book contacts
- Vendor address book
- Sales statistics leader board with top sales person photo for each category
- Referral Partner form, merchant application form, and recruiting lead form

Q: How do I receive training on how to use the software? What is the best way to manage the software for my employees and my sales office?

Before your first training session begins, you must first complete the entire setup and configuration checklist provided to your business after the software is installed. It is highly recommended that you assign one of your employees as the manager for your CRM system and will be the point of contact when your employees and sales reps need help. This person will be in charge of learning the software, contacting us with questions or training, setting up the entire system, managing all features, and insuring your entire staff is properly using and updating the system in accordance with their daily tasks, department goals, and individual job responsibilities within your company. Our company has developed over 64+ online YouTube training videos covering every feature within the CRM software. Simply watching all the training videos will eliminate the need to receive any support or training from our company as the videos will answer almost 98% of all your questions.

You also must watch all the 64+ YouTube Training videos located here:
http://www.youtube.com/user/rhendrix76#g/u

And you can download all support and training materials on this page
http://bankcardpros.com/html/training_videos___manuals.html

Q: Where can I view your sample sales website templates?

http://bankcardpros.com/html/web_design.html

Q: We are having a hard time getting our sales websites designed and not happy with our web designer. The website we received does not do anything for us. Can you provide us a website as well as your CRM software?

We have 12 years of experience within the bankcard industry, so you would not have to deal with a web designer who has no knowledge of the bankcard industry. This would require you to spend hours of your time to prepare the website layout and 100% of the content for a web designer that would require that you provide all this for them.

Here are a few example sales sites from the templates we offer:
http://bankcardpros.com/html/web_design.html

When we design your sales and career opportunity websites, there will be graphics and links on the sales websites so you can receive business referrals, people can fill out an employment form and submit their resumes when they want to join your company, and visitors can fill out an online application for a merchant account. Your sales website will be designed and ready to receive referrals, leads, and applications from your visitors.

All these forms are linked to your Bankcard Pros CRM software so you can collect the contact information and all data from these forms and contact the leads, keep track of the status of the leads, and keep track of all the activity and history of each lead.

Sample Business Referral Form
http://bankcardpros.net/referral_merch.php?agent_id=1

Sample Recruiting Employment Application form
http://bankcardpros.net/apply

Sample Merchant Account Application
http://bankcardpros.net/app_manager.php?app_id=1925

Sample Customer Service Survey
http://bankcardpros.net/?form=customer_service&u=1

All these forms are already built and available within Bankcard Pros CRM account tracking software. The CRM software allows you to manage these forms, and customize the fields and content of these forms so you can edit and customize them based on how you want the forms to work for your sales office.

Q: I will only use 30-50% of these features and this seems to be more than what I am looking for, what are my other options?

The software has a user access rights feature that allows you to disable features, sections, or entire pages within the software like it does not exist. We have clients that state that they will only use 50% of the features this software provides. This feature allows you to disable features and pages you do not want to use or allow your users to have access to.

Q: Is the software web-based?

Yes, the software is installed and accessible via your company domain name and any user can login wherever they have internet access 24-hours a day.

Q: Is this software a CRM software?

Yes, this software provides all the features that other leading CRM software packages. Over the past 9 years, our software has been custom designed and built specifically for the credit card processing industry based on the feedback and requests of hundreds of sales offices like yours. In addition, the software also provides all the same scheduling features providing in Microsoft Outlook 2003 including the calendar system, scheduling recurring events, tasks, appointments, reminders, etc. However, the software does not provide email functionality. The software provides a way to send communications and messages back and for the between users in the email system on the home page as well as the News Alert system in the support section.

Q: What is the cost for installation?

There is no cost for installation as this is included with the purchase price of the software. We provide free setup and installation and can take as little as 1 hour to complete. If you want to move your software and database at a later point in time, there is a $185 fee to move and reinstall your software on a different server, hosting account, or domain names.

Q: What if I would like to add new features or customize a few things in the software?

We can provide this service for you if it improves the functionality of the software. We charge $65.00 per hour for all programming work. Please allow 2-5 business days to complete the new customization project or task, depending on how complex the tasks are.

Q: Can we install the software on our server?

Yes, we will be able to assist you install the software on your server. If your server is a Windows 2003 or above server, you need to install PHP and MySQL software, IIS, and the server must be setup to host live domain names on the server, or you can install the software to be accessed internally via IP address/port. You can also access the server via IP address and access the software internally only by all employees where no outside person can access the software.

Q: Can Bankcard Pros provide web hosting for our business?

Yes, we provide full web hosting, emails, and control panel access to the Plesk server where it is being managed in a high-secure facility in San Diego, California. Top Technology, Secure Data Centers and

Infrastructure. Our fully modernized, state-of-the-art data centers in San Diego and in Phoenix use the best and most reliable brands: Our data storage is Seagate, our network runs on Cisco, and our servers are based on Intel and AMD products. The cost to provide hosting for your CRM software is $10.00 per month in addition to your monthly support fee.

Q: How long does installation take? A few days? I'd like to get started as soon as possible.

Bankcard Pros CRM Software can be installed and live within 1 hour or less. When we host the CRM for our clients, we can register your domain name with www.godaddy.com, change the DNS name servers of your domain name to point to our servers, setup your client account on the server, setup your hosting account, setup the FTP account, upload files, and install your CRM software ALL within 20 minutes. This is how fast we can do this if there is no issues with your domain name or hosting account.

Q. What training comes with the initial setup or purchase of the software?

Training and support is in no way a part of the purchase of the software. Support and training is an additional service we provide. You must pay the first monthly support fee before support and training will begin.

Q. If I setup the software on your server, can it easily be moved later to my own server, if so desired?

Yes, we can move the software to your server, but this will be considered a new installation and will be billed at $125.00 new install fee.

Q: Do you recommend installing an SSL Certificate on our domain name to protect the data?

Yes, every company utilizing a CRM software should have an SSL Certificate installed on their domain name. In the world of electronic commerce, security is paramount. Although Web sales are on the rise, widespread fears about sending private data over the Internet keep millions of potential shoppers from buying online.

According to Connecticut-based IT research firm Gartner, Inc., 15 percent of U.S. Web shoppers are so worried about online fraud that they don’t shop on the Internet at all. The numbers are even higher in Great Britain, with 41% of respondents to a CyberSource Ltd. survey citing security fears as one reason they don’t shop online.

To run a successful Internet business today, you absolutely *must* assure customers that their credit card numbers and personal information will be kept safe from interception. If consumers perceive that their sensitive data *might* be compromised online, they are unlikely to do their shopping on the Internet.

But the news isn’t all bad. In response to the growing number and sophistication of Internet thieves, Web users are getting smart about online security. More and more of them are looking for the padlock icon, the “https” prefix or a green address bar before submitting personal information to *any* website.

It doesn’t matter how big or old or trusted your business is -- if your company’s website doesn’t display the telltale signs of a Secure Sockets Layer (SSL) Certificate, visitors may leave before making a purchase, creating an account or even signing up for a newsletter.

Installing an SSL Certificate on your website protects information flowing to and from your site from cyber thieves intent on stealing personal data. Names, addresses, passwords, account and credit card numbers – all are safe when submitted to a website with a valid SSL.

Secure Sockets Layer (SSL) technology protects your Web site and makes it easy for customers and your sales partners to trust you. An SSL Certificate enables encryption of sensitive information during online transactions or submitting data online using online applications. Each SSL Certificate contains unique, authenticated information about the certificate owner.

Every SSL Certificate is issued by a Certificate Authority that verifies the identity of the certificate owner. Without SSL encryption, packets of information travel through networks in full view. Imagine sending mail through the postal system in a clear envelope. Anyone with access to it can see the data. If it looks valuable, they might take it or change it. Without third-party verification, how do you know a Web site is really a business you trust? Imagine receiving an envelope with no return address and a form asking for your bank account number. An SSL Certificate helps Web site visitors protect sensitive information and get a better idea of who they are trusting with it.

Bankcard Pros staff will assist you in purchasing and installing an SSL certificate on your website to make it secure. More information on costs per year: http://www.aplus.net/ssl_certificates.html

Q. If Bankcard Pros CRM hosts my CRM, does it include an SSL Certificate?

SSL Certificate is not included in the software purchase or support fees. You will be responsible for purchasing your own SSL certificate which starts at $49.95 per year with www.godaddy.com. If you need us to install your SSL, we will need to access your server and install the SSL, and we will bill you $65.00 to do this.

Q: If I host the CRM myself, how is an SSL Certificate handled?

You will need to contact your SSL provider for support and assistance in installing your SSL, or have your IT person handle this for you. If you need us to install your SSL, we will need to access your server and install the SSL, and we will bill you $65.00 to do this.

Q: Is your Bankcard Pros CRM software PCI compliant?

The answer is **YES**, our Bankcard Pros CRM is compliant and certified, even though our CRM software does not store credit card data! Since partnering with Trust Guard http://www.trust-guard.com, our CRM software is scanned on a monthly basis for over 42,000 known vulnerabilities which helps to protect our CRM software from Hackers, Trojans, worms and viruses.

We highly recommend our customers to contact Trust Guard and subscribe to their services and have your CRM site scanned on a monthly basis to insure your CRM is secure, especially if you host your CRM yourself. Although our CRM software is compliant and certified, we do not guarantee anything and are not responsible for any unauthorized access or loss of your data. Their service is around $25.00 and up to $45.00 depending on how frequent you want your CRM site scanned.

Statistically there's a huge chance (over 80%) that any site is currently vulnerable to Worms, Trojans and Hackers! That's why merchant banks and credit card companies are pushing so hard for PCI compliance. A PCI Compliance scan and Certification will make your Merchant Bank happy, but what's more important is it could save you from losing your business, and ten's of thousands of dollars in fines and penalties should a breach ever occur.

We also add hundreds of new vulnerabilities every month to ensure that your site is always up-to date with the latest protective measures.

For most people, the world of PCI (Payment Card Industry) is very complicated, frustrating, and extremely boring. So, in an effort to help you keep your sanity, I've put together the following information for every online business owner that's been told that they need **PCI Scanning** or **PCI Compliance** for their website, but don't ever get a straight answer as to what it is, why they need it, what to do about it, or how to get it. My goal here is to simplify PCI for you so that you can make a clear, educated decision and weigh your options on your terms. You won't find any other resource like this online, so be sure to bookmark it so you can easily access it again. I should also mention that while we go to great lengths to provide you with as accurate information as possible, we don't make the rules, laws and/or regulations that govern PCI, and the information below may change at any time. So, if your bank or acquirer (that's one of those ambiguous words I'll define for you below) tell you something different than what is stated below, we recommend you follow their instructions. This document is for information purposes only. For the official 'migraine-inducing' documentation, go to www.pcisecuritystandards.org.

Q: I'm kind of concerned about cost for this and looking to do it as cheaply as possible.

You are viewing your purchase with many concerns about how much it will cost you and your sales organization, when you should be making every consideration of how much time and money the purchase will actually save your sales organization on a daily, weekly, and monthly basis.

Many other CRM software products charge high per user fees, up to $250 per user, which can easily add up to thousands of dollars in monthly fees for a CRM you have no control over, and they all limit you on how much disk space per user.

Here are just a few CRM competitors (not customized for the bankcard industry) and what they charge per user (you will also find their support and add-on fees are very expensive as well):

Microsoft Dynamics CRM	$34 per user
Salesforce.com	$25 up to $250 per user, plus high support fees
Sugar CRM	Up to $60 per user per year
Zoho.com	$12 to $35 per user
GoldMine.com	$695 per user
Vtiger.com	$12 per user

The fact is, purchasing Bankcard Pros CRM will actually provide your business a Return-on-Investment in as little as 30-60 days of using the system, which is actually what you should be focusing on. Utilizing the CRM software will save in expensive overhead costs including managing and supervising employees, provide a highly efficient and effective organizational structure of completing daily tasks, elimination of paperwork, reduce time on phone, eliminate 50% requests for support via email, reduce the demand for support via email and phone, and many other demands for various day-to-day support issues by your employees and outside sales reps. The CRM automates your entire sales organization and provide you statistics and reports on a daily basis so you can track the production and progress of every employee and sales rep.

There are absolutely no per user fees, just the cost to purchase the software and the monthly support fee. For a small one-time license fee purchase, you will be investing in a software system that has been customized specifically for the electronic payment processing industry.

Want to build your own software for your business? You will be spending thousands of dollars a month in programmers, plus you will have to have 2-3 employees on your staff, including yourself, investing countless hours per month in managing this project, working with programmers to insure they know what you want, and supervising to make sure they are working the hours they are billing you. It could be a 6 month or up to a 2-4 year project for you depending on what you want included in your system, and you probably will not end up with a product that offers all the features as Bankcard Pros CRM.

Why would you try to re-invent the wheel and try to build something that already exists when you can be up and running in a few weeks for $2,500 or less? Our software has been built and designed based on the feedback and requests from hundreds of clients over the past 5 years. You will also need to consider the costs and time involved in managing a project like this, managing your programmers, making sure they are on schedule, testing their work, making sure they are working. You will need to involve at least 30% or more of your time each work day and weekends managing your programmers, providing them with instructions on what to do, making sure they work, and more. The costs and time to do all this will be overwhelming, so you will need to factor in your time in this project on a daily basis for the first 2-3 years, in addition to trying to run your business, hire sales reps, provide service and support for your merchants, and more.

Q: I was expecting the Bankcard Pros CRM software to be live and ready to use when you installed the CRM software, and I don't have time to do this myself. What can I expect from Bankcard Pros staff because this is what I pay you to do?

If you do not take an active participation in reading the support documentation, learning how to setup the CRM, and complete the setup and configuration of your CRM software, this project will be a failure for you and your business. We understand that you will not be able to learn 100% of the CRM software in the first 5 days, but you should be able to learn and setup 60-80% of the CRM, and we will be able to guide you in learning and setting up the remaining steps. However, you are required to make a reasonable effort to do as much as you can on your own before your first training and support session will begin. The CRM software will only be as successful as how much time you put into it.

It is the customer's responsibility to utilize the software they purchase. The biggest complaint we get is when we hear from a customer 2-3 months after they purchase the CRM software is this, "We never could use our CRM software!" When we get this complaint and after we investigate we find out the customer did not do 3 things, (1) they have not even logged into their CRM software for months, (2) they never started or completed their setup and configuration checklist which is required, and (3) they never emailed us for support.

Just by reviewing your CRM software, we can quickly tell if you have setup anything in the CRM or how many times you have logged in, and know how many minutes they spent learning, setting up, and using their CRM software. Receiving support from our company does not start on day 1 after their CRM is installed. Support starts after they completed the checklist and after they viewed all the training videos.

Q: What will it cost for support each month? Or is this included?

The monthly cost of support each month is from 39.95 and up to 179.95 per month, depending on the level of support you need. For the basic 39.95 plan, you will receive up to 1 hour of support monthly. If you are not paying a monthly support fee, then we will provide support for $69.00 per incident with a 1 hour limit per incident.

Q: After six months, can I still receive upgrades?

You will receive free software updates and patches as long as your company continues paying the monthly support fee each month. Major software version releases and/or component upgrades will be $895.00 or more for new upgrades.

Q: Can I build my own forms to link to all my sales websites?

Yes, the CRM software allows you to build your own online forms. Here are a few forms we designed for you to review. Fill out our sample online forms, surveys, and questionnaires we custom built:

MLS Sales Survey – Fill-Out Survey
Employment Application – Fill-Out Application
Referral Partner Form – Fill-Out Form
Lead Management Survey – Fill-Out Survey
The Power of the Sales Process Survey – Fill-Out Survey
Automated Selling Tools Survey – Fill-Out Survey
Powerful Presentations Survey – Fill-Out Survey
Customer Relationship Management Survey – Fill-Out Survey
Know Where You Stand Survey – Fill-Out Survey
Questions to Measure Employee Engagement Survey – Fill-Out Survey
Customer Service Survey – Fill-Out Survey

Q: What rate quote calculators are in the system?

- Merchant Cash Advance Rate Quote 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 Application with Special Rates and Fees Quote
- Payroll Solutions Return-On-Investment (ROI) Calculator

Q. How do I change the Visa, Mastercard, Discover Interchange names and rates in the Interchange Rate Quote Calculator?

The Interchange rate quote calculator allows you to import new Interchange items and rates when Visa, Mastercard, and Discover makes changes to these items. You are able to import these items and rates via an Excel document with 3 separate imports for Visa, Mastercard, and Discover. When you import the new items and rates, the system will automatically delete ALL old items and rates and replace them with the new items and rates you import.

Q: Does BankcardPros CRM sync with Microsoft Outlook 2010, or Google Calendar, Apple iCal, or other programs?

Yes, our CRM software sync's with a total of 38 applications in all, using the iCalendar application http://en.wikipedia.org/wiki/ICalendar

Complete list of applications with iCalendar support
http://en.wikipedia.org/wiki/List_of_applications_with_iCalendar_support

iCalendar is a computer file format which allows Internet users to send meeting requests and tasks to other Internet users, via email, or sharing files with an extension of `.ics`. Recipients of the iCalendar data file (with supporting software, such as an email client or calendar application) can respond to the sender easily or counter propose another meeting date/time.

iCalendar is used and supported by a large number of products, including Google Calendar, Apple iCal, GoDaddy Online Group Calendar [3], IBM Lotus Notes and partially also by Microsoft Outlook. iCalendar is designed to be independent of the transport protocol. For example, certain events can be sent by traditional email or whole calendar files can be shared and edited by using a WebDav server, or SyncML. Simple web servers (using just the HTTP protocol) are often used to distribute iCalendar data about an event and to publish busy times of an individual. Publishers can embed iCalendar data in web pages using hCalendar, a 1:1 microformat representation of iCalendar in semantic (X)HTML.

List of applications with iCalendar support:

- 37signals Backpack
- Alfresco - a collaboration portal that allows export of site calendars in iCal format.
- Atlassian Confluence
- Apple iCal
- BusyCal
- Contactizer
- Buni Meldware Communication Suite
- Facebook
- FirstClass
- Google Calendar
- Huddle
- Jalios JCMS
- Lotus Notes
- Meeting Maker (PeopleCube)
- melssCRM (CRM)[1]
- Microsoft Entourage
- Microsoft Exchange Server
- Microsoft Office Outlook 2000
- Microsoft Office Outlook 2007
- Microsoft Office Outlook 2010
- Microsoft Works Calendar
- MonoCalendar
- Novell Groupwise
- Nuvvo
- Projektron BCS
- Rainlendar
- Sun Java Calendar Server

- Teamwork agenda and meetings synchronizer
- Westlaw (TWEN)
- Windows Calendar
- Windows Live Calendar
- Wrike
- WebTrain - Web Conferencing Meeting Reminders
- Yahoo Calendar
- Yandex Calendar
- Zimbra Collaboration Suite
- sunbizar Internet Marketing Company
- Sunbizar Technologies Systems Software Development Company

Q: Will the software support LIVE Chat Support Software?

We can integrate Live Chat Software to your CRM software so you can provide instant live support to all your sales partners

- ProvideSupport.com - $15.00 per month
- PHPLiveSupport.com - $49.95 for unlimited departments and unlimited operators, you own the PHP Code
- Solutions.LivePerson.com - FLASH DEMO

Q: Can you also host our company website and emails?

Our company only provides hosting for the Bankcard Pros CRM software. Although we are equipped with the servers and technology to host websites and email accounts, we are not in the business to provide this service as well as the support it requires. If we do provide hosting and emails, our services are suitable for small offices that rely on using Microsoft Outlook as their primary email software. However, many of our clients have a high demand for reliable email solutions for outside sales agents who need to access their email through a reliable webmail client 100% of the time. Our webmail software is not suitable for users who rely on using their webmail to manage all their email needs instead of using Outlook. Our webmail software, as well as many webmail services available from other companies, are not built to support high volume email needs for large sales forces on its own.

If you need a high volume webmail solution, you can look into these solutions:

GoDaddy Work Space	https://login.secureserver.net/
AtMail Webmail	http://www.atmail.com/webmail-client/
Microsoft Exchange	hhttp://www.microsoft.com/business/bpostestdrive/exchange.aspx

Q: Our employee (sales manager) who manages our CRM software is no longer with our company. What do we need to do to insure they can no longer access our CRM software?

There are a few things that must be done to insure former employees can no longer access your CRM. You will need to change the user account information for this person by changing the username, password, and email address for this user account (especially the email account). If you just change the username and password, and not the email, they can still use the password reset instructions on the login page to reset the username and password if the email is still the same. So make sure you change the email as well. Secondly, if this former employee was in charge of managing the CRM for your company, there is no way you can know if this person knows all the usernames and passwords for all user accounts. So you will need to change the password to all user accounts in the system, and then send each user the password reset email so they can click on the link and follow the instructions for changing the passwords again. This is the only way you can know for sure former employees will have no way to access your CRM.

You can also monitor the login sessions for all users logging in. The login sessions will tell you if this former employee logged into your CRM by their IP address. If you notice they are logging in without authorization, you can take legal action against this former employee for theft of data, and so on. But you will also be able to restrict the IP address from the former employee from logging in again into your CRM.

Q: If you host my Bankcard Pros CRM software for me, what hosting features do I receive, and how much does hosting cost?

Hosting fees are not included in the support fees. Hosting is $14.95 per month which includes PHP, MySQL database, and your CRM files installed and live. Atmail6.0 Webmail will cost an additional $50 per year per 100 user accounts.

You will login to your hosting account here:
https://216.139.215.50:8443/login_up.php3

You can view your website traffic statistics here:
https://YOUR-DOMAIN-NAME.COM/plesk-stat/webstat/

In addition, you will receive the following hosting and control panel features:

Plesk 10 Control Panel and Hosting Account

Parallels Plesk Panel provides a structured, easy-to-use, end-user server control panel that simplifies our clients hosting management experience, reducing both churn and support costs. And the intuitive Web-page model lets users learn quickly, rapidly find the desired functionality, and still have full access to all needed power. Parallels Plesk Panel now comes with a separate administrator interface, optimized for server and business management.

Parallels Plesk Panel provides complete customer and business management capabilities include support for account resources, FTP, SSL, e-mail accounts, Web mail, favorites, databases, traffic limits, DNS management, service rebooting, Web statistics, shell access, service plans, cron jobs, backups, and search capabilities — plus an internal file manager.

Plesk 10 Features: http://www.parallels.com/products/plesk/features/
Plesk 10 Video Tutorials: http://www.parallels.com/products/plesk/tutorials/

Bankcard Pros CRM clients now have the tools to provide its staff and outside sales agents with a full-featured, powerful webmail solution called Atmail Webmail 6.0:

Atmail 6.0 Webmail: http://www.parallels.com/products/plesk/atmail/
Atmail 6.0 Demo: http://a6demo.atmail.com/

Atmail enables the easy administration of email accounts and provides the webmail interface to Plesk email accounts. **Atmail Full** gives you the full power of Atmail's groupware, multiple interfaces and Outlook Sync, as well as the acclaimed Atmail WebAdmin, for ease of account management. By upgrading to Atmail Full, hosting business email accounts becomes elegantly simple.

Atmail Webmail allows users to create contacts through a simple, elegant web interface or through your phone. Share them with friends, coworkers and colleagues - through numerous supported clients and mobile devices. Create calendar entries to keep you in touch with what's going on. Share your events so people know what you're up to. Be reminded of important tasks, events and meetings - all this, within your browser or a mobile device of your choice. Bridge the information gap. With Outlook WebSync, you can keep your desktop and web items synchronized through a hassle-free, unobtrusive interface. Achieve information coherence. You never have to check for when an email arrives, as emails get 'pushed' to the mobile device of your choice as soon as they are received. Contacts go to your mobile device as soon as they are updated. Be informed on the dot with Atmail Push. Sit back and relax. Maintenance, administration, and configuration tasks are readily accessible through Atmail's elegant, easy-to-use interface.

Bankcard Pros CRM clients now have the tools to provide its sales agents and merchants with the ability to build a website or edit existing websites with the new Plesk SiteBuilder 4.5.

Plesk 10 SiteBuilder: http://www.parallels.com/products/plesk/sitebuilder/
Plesk 10 SiteBuilder Demo: http://sitebuilder4.demo.parallels.com/Wizard

Parallels Plesk SiteBuilder is an easy to use, scalable web application designed to create and manage websites. This next-generation software can be integrated into any business process. Parallels Plesk SiteBuilder is the ideal marketing tool for converting your site traffic into a new client base.

Parallels Plesk SiteBuilder includes an easy to use five-step wizard. In addition, the newly improved modules make Parallels Plesk SiteBuilder even more powerful and flexible. The modules included are: Blog, Image Gallery, Guestbook, eShop, SitePal, Forum, Feedback, Registration, RSS Reader, Voting, Script, Area Map, File Download, SiteMap, External Page, and Flash Intro.

Q. I'd like to have my bookkeeper put together an Excel file of all our merchants, so that I may upload them to the CRM, upon making the purchase of your product. What fields do you recommend I have her include in the Excel file?

As a minimum, you would include the following fields:

Bank/Processor Name
MID#
Sales Rep Name
Sales Rep ID
Activation Date
DBA Name
Address
City
State
Zip Code
Owner Name

Location Phone
Location Fax
Equipment Type
Email
Website

If you don’t have emails for merchants, you should have someone spend 2-3 days calling all your merchants asking for their email or new emails, and update your system. You can use the email marketing tools to be able to send out marketing emails to all your customers, especially when this does not cost anything to you.

Q: When I import my existing merchants into the CRM software, what fields are available for me to import?

You are able to import your existing merchants using an Excel document, and the following fields are available for you to map and successfully import all your data:

Agent Name
Agent ID
Bank/Processor Name
Status Level
Start Date
MID (Merchant ID Number)
Notes
SIC Code
Amex Account #
Discover Account #
Additional Services
ABA (Routing Number)
DDA (Account Number)
ATM Bill Denomination
ATM Cashloader
ATM Cassette Type
ATM Communication type
ATM DNS
ATM Gateway
ATM MAC Address
ATM Misc
ATM Owner
ATM Phone Number Phone
ATM Remote Monitoring Service
ATM Serial Number
ATM Static IP Address
ATM Subnet Mask
ATM Type
ATM Warranty End Date
ATM Warranty type
Add'l Residual Share User
Add'l User Residual %

Annual Revenue
Average Ticket
Business Website
CVV2
Cell Phone #
Cell Phone # Area Code
Contact Name
Contact Phone
Contact Phone Area Code
Credit Card Billing Address
Credit Card Number
Customer Service Phone
Customer Service Phone Area Code
Customer Status (New / Existing)
DBA Address
DBA City
DBA Federal Tax ID Number
DBA Name
DBA State
DBA Suite
DBA Zip
Discount Rate
EBT Cash
EBT Food
Email Address
Equip Platform
Equip Serial Number
Equip TID
Equipment Brand
Equipment Type
Fuelman
Highest Ticket
Lease Monthly Payment
Lease Score/Grade
Lease Term
Leasing Co.
Legal Address
Legal City
Legal Name
Legal State
Legal Suite
Legal Zip
Length of Current Ownership
Location Fax
Location Fax Area Code
Location Phone
Location Phone Area Code
Mailing Address
Mailing City

Mailing State
Mailing Zip
Monthly Processing Volume
Name of Bank
Owner1 % of Ownership
Owner1 Date of Birth
Owner1 Drivers License #
Owner1 Drivers State
Owner1 First Name
Owner1 First+Last Name
Owner1 Home Address
Owner1 Home City
Owner1 Last Name
Owner1 Phone
Owner1 Phone Area Code
Owner1 SSN
Owner1 State
Owner1 Title
Owner1 Zip Code
Owner2 % of Ownership
Owner2 Date of Birth
Owner2 Drivers License #
Owner2 Drivers State
Owner2 First Name
Owner2 First+Last Name
Owner2 Home Address
Owner2 Home City
Owner2 Last Name
Owner2 Phone
Owner2 Phone Area Code
Owner2 SSN
Owner2 State
Owner2 Title
Owner2 Zip Code
Percentage Swiped
Pin Based Debit (New / Existing / N/A
Products/Services
Residual Override %
Software: Login Password
Software: Login Username
Software: Software Type
Software: URL Site Login
Terminal Id(s)
Toll Free #
Toll Free # Area Code
Transaction Rate
Voyager
Wright Express

Q: Is there a limit to how large a file I can upload? I'm having trouble uploading some files.

We uploaded 3MB files and it took about 10 seconds to upload. We also uploaded 20-30 MB files and it took about 45 seconds to upload. There are no restrictions on upload size. If you are having issues, then you might have problems with your PHP settings on your server, you should change the PHP time out settings to 6000 seconds.

Q: We have 2 processors which we have entered into the CRM software. However, our sales reps can't see the bank/processor online application as an option. Is there a setting somewhere that I need to activate so they can see both processors when entering an Internal App?

You have to go to the user account and select the bank/processor name you want the user to have access to, and then save the settings for that page. Each user account gives you the ability to choose which bank/processor you want them to have access to use or not allow them access to use.

Q: What kind of features does your CRM provide in regards to equipment management and inventory tracking capabilities?

After you login to our demo website, you can go to the following page link and see how users can manage the equipment items and inventory here:
https://bankcardpros.net/equipment_manager.php?cmd=list_equipment_inv

You can add inventory via serial numbers here:
https://bankcardpros.net/equipment_manager.php?cmd=inventory&equip_id=3

You can view your equipment inventory statistics and costs here
https://bankcardpros.net/equipment_manager.php?cmd=list_equipments

Here is where you edit equipment items
https://bankcardpros.net/syslists.php?cmd=list_equips&EquipmentType=Terminal

Here is where the equipment is added when you board a new merchant application
https://bankcardpros.net/app_manager.php?step=page&p=3&app_id=2072

Here is where you manage all the equipment programming options and prompts for each equip item here
https://bankcardpros.net/app_manager.php?cmd=edit_equip_item2&p=3&equipment_purchase_id=290

And this page is where you can view the summary of equipment for each merchant account in the status section
https://bankcardpros.net/apps_status.php?cmd=edit_app&step=equipment&app_id=2072

Q: Is it possible for our sales people to send out one email to all his/her leads at one time, like an email blast?

Our CRM software does not have a feature in the system that will allow you to email a letter or advertisement to ALL of the leads in the system. You can send out mass emails to all your merchants.

Further, if you do this on a repeated basis, our server, your server, your domain name, and/or all your IP addresses of the domain name that was used to send out the email blast would get blacklisted for spam. It is best to use an email service company to do this mass email task you need. I don't believe any company in the USA will allow you to do this because of the spam email laws. Emails can only be sent out to subscribers with their permission. There might be companies in other countries that will do this for you, you will just have to do research and find a company in another country. And if you did this, you would need to set up another domain and email and phone to take the inquiries so you don't jeopardize your real company name you operate under, because you could still end up getting black listed.

Even http://www.constantcontact.com has a strict policy of emailing to people without permission. If they get enough complaints, they would even shut your account down for policy violations.

Q: When a sales person gets an email that there is a new lead in the CRM, is it possible for the email alert to link the page that the lead is listed on?

All the email notifications are located in the administrator's setup/configuration system, on this configuration page http://bankcardpros.net/email.php?cmd=edit_mails

We currently have this feature for trouble tickets and the code you use for trouble tickets is as follows:

http://www.bankcardpros.net/tickets.php?cmd=view&ticket_id={$ticket_id}

Adding this code to the email notification will allow recipients to click on the link and view the new trouble tickets they receive from the CRM system.

The code you would use inside your new lead email notification content would be as follows:

http://bankcardpros.net/leads.php?cmd=status&lead_id={$lead_id}

Q. Can I integrate PDF docs into the software on my own?

Integrating PDF docs into the software is a 3 step process. Our programmers must first integrate the PDF files into your software, as you will not be able to do this step unless you are a programmer and you are familiar with our system and how PDF integration process works. The next step is you will need to customize and build the online application in which the software is built to allow you to do this on your own. The final step is mapping the fields of your online application to the fields on your PDF document, and the software has a mapping page built so you can do this on your own as well.

Q: When we back up the database and download it opens up in Notepad with useless information, seems to just be the headers for the system, has not customer information. Any suggestions on how to back up and save properly so it is useful?

When you backup your MySQL database to a text file on your desktop, you need to just save it as it is saved in a format used by the MySQL database software. If you open it in Wordpad, it will show the data properly, but it is in a format you will not understand or cannot use in any other application. If your software or the server/hard drive fails, we can easily have your software installed within 1 hour or less, and all you need to do is provide us with the database backup text file you download each day, and we can import that into your mysql database and all your data in your CRM software will be restored and live. If you try to open the text file in notepad and wordpad, and if you alter the data, edit, add, or delete any data, you will ruin the integrity of the database text file and it will not be useable for importing and restoring your CRM software in case of server/hardware failure. It is highly recommend you only backup and store the text files only, and never alter or change any of the data content in the text file.

Q: Which PDF merchant applications and documents are available in the software from the major banks, processors, or ISO's?

Here is the entire list of all PDF merchant applications that are available within the software. If you are using any of the following banks/processors/ISO's, then you will not have to spend the time and money to configure the software, customize the user online app, add the PDF document, and map the fields. The list is as follows:

Over 90+ Major Bank/Processor/ISO PDF Merchant Applications and Documents

- ABC Global Systems (EVO)
- American Express Card Acceptance
- AMS - Allied Merchant Services
- Banctek Solutions
- Chase Paymentech Solutions
- Clearent LLC Merchant App
- COMDATA Processing Systems
- CTS Holdings Merchant App
- Cynergy Data Merchant Services
- Cynergy Data/Harris Bank Merchant App
- Discover easi App
- Dynamic Payment Solutions
- Elavan Inc. Merchant App
- Elite Bankcard Network
- EVO Merchant Services
- EVOyes Merchant Services
- First American Payment Systems
- First Data North Merchant App
- First Data Omaha
- First Data/Wells Fargo Merchant App
- First National Bank of Omaha
- Global Merchant App
- Humboldt Merchant Services
- Humboldt Merchant Services App
- iPayment
- IRN Payment Systems
- MPC Merchant Bankcard Application
- MSI Merchant Services – Regular
- Newtek Electronic Payment Processing
- NOVA
- NPC National Processing Corporation
- National Merchant Center/Wells Fargo

- Newtek Electronic Payment Processing
- Online Data Corp / Wells Fargo Bank, NA
- Orion Payment Systems/Global Direct
- Pivotal Payments / Bank of America, NA
- Pivotal Payments / Chase Paymentech
- Pivotal Payments/FDR Merchant App
- POS Card Systems / Public Agency App
- PowerPay Merchant App
- PRI / TransFirst (CharegeItPro)
- RBS WorldPay
- RBS WorldPay/Comdata Merchant App
- Sage Payment Solutions
- Sage MOTO Questionaire
- Sage Authorize.Net Setup Form
- Total Merchant Services
- Total Merchant Services - MO/TO App
- Total Merchant Services - Standard Retail
- U.S. Merchant Systems
- United Bank Card, Inc.

Chase Paymentech PDF Documents

- Chase Paymentech Solutions
- Chase Paymentech EFC Cover Sheet
- Chase Paymentech Merchant Agreement
- Chase Paymentech Merchant Application
- Chase Paymentech Micros Setup Form w Merchant Link
- Chase Paymentech Netconnect Merchant Authentication Information
- Chase Paymentech Orbital Setup Information Form
- Chase Paymentech Recon Solution Setup Form
- Chase Paymentech Site Survey Form
- Chase Paymentech Terminal Input Request Form
- Chase Paymentech Discount w/Billback
- Chase Paymentech Discount w/Enhanced Billback
- Chase Paymentech Flat Discount
- Chase Paymentech Interchange Pricing
- Chase Paymentech Three Tier
- Chase Paymentech Two Tier

GETI Check Services PDF Documents

- GETI Check 21 Plus Merchant App
- GETI Checks By Phone Merchant App
- GETI Gift Merchant Merchant App
- GETI Paper Guarantee Merchant App
- GETI POS Blue Merchant App
- GETI Recurring Debit Service Merchant App

- GETI Silver Merchant App
- GETI Tele Debit Merchant App

Equipment Lease Vendors

- CIT LFG
- First Data Leasing
- Globaltech Leasing
- LADCO Leasing
- Lease Corp of America
- Northern Leasing
- Popular Leasing

Check Services PDF Documents

- Secure Payment Systems - Check Service Agreement
- Secure Payment Systems - eCheck Addendum
- TeleCheck

Gift Card Vendors

- Valutec Gift/Loyalty Cards
- Secure Payment Systems - Gift and Loyalty Agreement

Merchant Working Capital Application

- AmeriMerchant - Merchant Working Capital Application

Q: I have about 15 employees and 100 outside sales reps. I have all the individual information on an excel spreadsheet. Can I import all 115 users in the system so I don't have to setup 1 user account at a time, which could take me up to 2 days to finish?

Yes, the system has a user import page that allows you to import all users at one time, including the following fields:

Username
Password
Account Status
User Type
Sponsor/Recruiter
Full Name
Title
Business Name
Address
City
State
Zip
Phone

Cell Phone
Fax
Tax ID#
Email Address
Website
Direct Residual %
Indirect Residual %
Equipment Sales %
Notes

Q: My CRM software is down, how do I find out what is wrong to get it back online?

There are a number of reasons why your CRM software may be down. Here are instructions on how to troubleshoot which problem is the reason why your CRM software is down:

Your Internet Connection: Check and make sure you have internet connection at your home or your office. In your internet browser, try browsing other websites like www.facebook.com or any other site. If you cannot access the site, then you need to contact your Internet Service provider and ask them to fix your internet connection.

Your Hosting Account: Make sure your hosting account is still active, and make sure there are no billing issues with your hosting account monthly recurring billing. See if you can login to your hosting account and check the status. Make sure the hosting account still exists. Make sure the hosting account has not expired in the hosting settings. If you cannot login, then contact your hosting provider like www.godaddy.com or other hosting companies you may use.

Your Domain Name: Make sure your domain name is still active, and make sure the domain name registration is still active or if it expired. To check the status of your domain name, go to www.whois.net and enter your domain name and make sure the expiration date has not expired. Also make sure the primary and secondary name servers for your domain name are still pointing to your server like ns1.creativevisionstudio.us and ns2.creativevisionstudio.us

Your Server: Check your server to make sure your server is still online, and make sure you can still login to your server. If you are not able to login to your server, call your service provider who is managing your server and ask them what is wrong. It might be technical problems with your server where you might need to just reboot your server and that is all.

The CRM Software: As last resort, email us at training@bankcardpros.com and we will check the status of your software and see if it is actually the software files that has caused your software to go down. If it is, we should have it back online within 1 hour or less, and if not, we will let you know exactly what the problem is.

Here are some bare basics on how the Internet works. Every time you go to a Web site, you use its domain name such as Yahoo, ZDNet, etc. to find it. That's not what the Internet's software uses though to hook you up to a Web site. Instead, your network connection uses address resolver software to look up the site's IP (Internet Protocol) address at a DNS server from the natural language address you've given it work work with. DNS is the Internet master address list. With it, instead of writing out an Internet IPv4 address like "http://209.85.135.99/," one of Google's many addresses, you can simply type in “http://www.google.com” and you’ll be you on your way. But, DNS can only work if it has the right address information in it.

Q: How do I add my own logos to the software?

The software is installed with the Bankcard Pros logo and graphic on top as default. You are able to add your own logo or banner graphic to the top of the page to replace the Bankcard Pros Logo, as well as replace and/or add your own logo/graphic to the merchant online application, referral form, and recruiting/career form within the site. When you login as the system administrator, go to the setup/configuration page, then click on LOGOS link, and upload all your logos on this page.

Q: How do I change the colors of the software?

When you login as the system administrator, go to the setup/configuration page, then click on the SITE COLOR SCHEME link, and edit the colors throughout the site.

Q: Can I customize the content and text of the login page, contact page, about page, and the merchant application?

When you login as the system administrator, go to the setup/configuration page, then click on ADMIN CONTACT INFO link, and edit the content there. Also, on the ADMIN COMPANY PROFILE, EDIT REFERRAL FORM, and EDIT MERCHANT APP links all within the setup/configuration section.

Q: How can I back up my data? I'm a bit concerned about security.

The software allows you to do a daily backup. You will have to follow a few steps to complete the backup process which is located in the setup/configuration checklist.

Q: Why is there a red blinking box on the top left of the site that says “BACKUP DATABASE”

If you have not backed up the database in more than 2 days, the backup database message will show up as a reminder to do this. All you have to do is click on the red blinking box, and follow the instructions. The software will generate a backup text file on the server of all the data that has been input into the software, and then you will get a new instructions link saying “Click here to download” to complete the backup process. If you move your mouse curser over the red blinking box, it will tell you how many days have passed since you last did a backup. It is recommended that you do a backup every single day. Losing just 1 day of data could cost your company hours, if not a few days, in time spent to re-enter all the data that was lost, if that ever happens.

Q: On this link /merchant.php?agent_id=1, the “?agent_id=1” on the end of the url leads me to believe that this app can be made to link to individual reps. How do we do that so that leads come into specific sales reps?

If you go to the users section, and click on a user type like “Sales Rep” you will see you have users. You will then put your mouse curser over each sales rep name, and you will see this in the bottom left of your MS Internet Explorer browser = /user.php?cmd=edit_user&uid=47 OR If you click on the user name, and edit the user profile, this will show up in your browser address bar = /user.php?cmd=edit_user&uid=47 and at the end will be the user id = 47, just replace 1 with the actual user ID # assigned to that sales rep.

Q. How is the merchant application submitted to our ISO, bank, or processor for approval?

We currently have over 90+ ISO's, Banks, or Processor's online apps integrated in our system where the online apps match all the PDF merchant applications for all 75 ISO's, banks, or processor.

Every ISO, Bank, or Processor has different requirements to submit a merchant account to them. They require the sales offices or sales reps to either fill out the online app in their system to get the merchant boarded, or they simply require that you email or fax the paperwork to them where they have the staff to board the merchant themselves in their own system.

So the answer to this question depends on which ISO, Bank, or Processor you are using.

Our software will simplify the entire sales process. Example: For in-house sales reps who do sales over the phone only, they can log into their software, fill out the online app for the merchant, and then submit the app to the merchant for review and signatures. Our system will email the PDF app to the merchant where all the fields are already populated by the system. The merchant needs to print the application, sign it, and fax it back to the sales rep.

To make the sales process even faster, our system will also email a email to the merchant that has a link to the online app with a digital signature by mouse feature, so all the merchant needs to do is review the app online, sign by mouse, and submit, and the sales rep will have everything he needs to submit to the processor. The sales rep can then open the PDF doc for that app, and will see all fields populated and all signatures in the signature lines, and just email or fax the PDF doc to their ISO, bank, or processor and the application process is done.

We can also design a script that will automatically log you into your ISO, Bank, or Processor's system, fill out all fields, and submit the app for you within a matter of seconds, so you don't need to type in a merchant account 2 different times which could include up to 300 fields for an online app. You would just fill out the online app in your system, click a simple button, and the software will automatically submit the data to your ISO, Bank, or Processor's online system.

Q: When importing leads, residual reports, or merchants into the software, the customer must do the following:

1. The only way we can train them over the phone is for them to email a copy to you so you can see what they are using.
2. We must review the report to make sure it is setup properly.
3. If they do not understand, email a copy of the sample reports to them so they can see.
4. All reports allow the customer to select all data in the MS Excel document, copy, and then go to the web page and paste the data in the field box provided, then map the fields, and finish the import process.

Q: Before the first training session with any new client, do the following:

1. Did the customer complete the set/up and configuration checklist that you emailed them?
2. The customer must go through the checklist first before you start training. If they do not understand a step, they need to check that item, and move on to the next item. When finished,

they must call us and schedule training and we will review the items they do not understand one item at a time.
3. What banks/processors are they using?
4. Have the customer email you a copy of the Merchant PDF documents they are using for each bank/processor.
5. Email the customer the sample MS Excel documents to them such as the sample lead list and residual report so they know what format they need to be.
6. They must import their existing merchants into the software. If they need help, they MUST email you what they are trying to import so you can make sure the report is correct with no errors. Import the list first to make sure all is OK and no errors. Show them what you imported so they can see that it works. Then delete the records and have them import so they can know how to do it.

Q: Before the customer can import residual reports, they must do the following:

1. First, they must read the section in the training manual that teaches them how the residual report section works.
2. Have them email the residual report to you so you can see what they are using and help them over the phone.
3. All merchants MUST exist in the database, including MID #'s and each merchant must be linked to a sales rep in the software.
4. The customer must customize the residual report template and add columns they want to show online for their sales reps to see.
5. If you need help, ask Robert to get on the phone with them.

Q: How can sales reps (users) import their own leads into the system?

Go to the leads section, and click on the Import Lead List link or the Add New Lead link.

Q: Can I export files from your software into excel or access?

We are able to add the feature for you to export excel or access files, we need to know what fields you want to use and this can be easily done, as this type or exporting features is a customized project, but easy to do. All my clients are different and request different fields and reports, so we happily accomodate each customer based on needs and requests.

Q: Is there any way I can see my company's logo in the app?

No problem, we can easily add your logo to the website as well as the PDF document as well.

Q: I want to upload residuals from 4-5 banks. How much will it cost me to have an automatic upload from them?

We can design uploading functions for residuals from your 4-5 different banks. This is a customized project. We need to see sample reports you receive from the banks. Please request Excel docs from your banks so the task will be easier and will cost less money for us to design this for you. Having this feature on your site is well worth the investment where it will save you countless hours each month from manually doing this process and keeps your sales reps happy with easily accessible reports online.

Q: What if we would like to customize the software and add new features just for our company?

Your company can purchase the source code and hire your own programmer that understands PHP and MySQL.   Please contact Bankcard Pros staff for the cost of the source code license.

Q. How do we keep the emails from going out on every status change. When our telemarketers are working a list and changing statuses they are getting emails on each account.

A. There is no way to turn that off at this time. The email always will go out to them. It is best for the TM to create a rule in their outlook express program so all emails will go in 1 specific folder instead of their inbox.

Q. You mentioned that your software can produce a referral partner online form similar to the one that I currently use for one of our referral partners. Can you send me a link to a couple of examples of this in use?

Every time you add a new referral partner user in the system, the software automatically creates a referral partner form with a unique URL link you can send to your referral partner to use when submitting leads to you. You are able to customize the logos and the entire content of these forms, as well as the fields used.

Q. Whenever someone at one of our referral partners submit a referral via our web form, it sends our office an email. From that, we then distribute the referral to an appropriate sub-agent. I presume we're able to handle this in a similar way with your software (assigning the referral to a particular rep)?

Yes you have complete control to customize the message and fields in the referral form. And yes, the referral form goes into the leads system as a lead, and is awaiting for you to assign it to a telemarketer to call and setup an appointment, assign it to a sales rep only, or both.

Q. Will I have the ability to tweak the referral form? Such as the verbiage above the form, the blanks and questions being asked, etc?

Yes, you are able to edit and customize all aspects of the entire referral form

Q. Also, when a referral is submitted via the form, does it automatically go into the CRM as a lead, waiting for me to assign it to an appropriate rep?

Yes, all referrals received are saved and stored in the leads section as a "Referral Received" status. There you can view the details, and assign the lead to a sales rep, a telemarketer user, or both.

Q. Does your software allow for any type of integration or export to QuickBooks?

We do not offer this feature at this time. If you provide us the developers specifications from Quickbooks to do this, we can build an export page that will allow you to export the correct data in the correct format that will work with Quickbooks.

Q: Regarding the Referral Form button on the Bankcard Pros demo site - I can setup multiple, completely separate, Referral Forms, correct?

Yes, you are able to build as many forms as you want. The software will even allow you to clone existing forms content and fields to new forms so you don't have to build new forms from scratch, saving you hours of work.

Q: I'll need to setup many Referral Forms, some with different fields than others. If so, what's the Referral Form button do if I have multiple forms?

THE WAY THIS WORKS IS YOU WILL SETUP MANY USER ACCOUNTS FOR ALL YOUR REFERRAL PARTNERS, AND EACH USER ACCOUNT WILL BE ASSIGNED ITS OWN REFERRAL ID LINK TO ASSIGN TO THE REFERRAL PARTNER THAT THEY WILL USE.

Q: When setting up a referral form, can some of the contact info fields at the bottom of the page be suppressed, so they're not seen? I may have a few forms that I'd like the user to be able to simply send in the information… but I may not want them to see our office's contact information. On your demo site, looking at how I'd edit the form, it appears there will still be the word "Fax", "Phone", etc on the bottom of the page, even if I leave those fields blank.

YOU WILL BE ABLE TO EDIT AND DISABLE FIELDS IF YOU DO NOT WANT TO USE THEM, AND YOU ARE ABLE TO ADD FIELDS IF YOU NEED TO AS WELL.

Q: In your marketing materials, you have in the flow of an app with a processor, that the Underwriter at the processor updates the app's status. Are you actually saying that the Underwriter at the processor will do this? I guess I'm not understanding how the CRM will show status updates on an app.

YOU AND YOUR STAFF WILL BE UPDATING THE STATUS OF EACH ACCOUNT. SOME OF MY CLIENTS HAVE THEIR OWN UNDERWRITER AS THEY CALL THEM, AND THIS PERSON GOES THROUGH EACH APP TO INSURE THE PAPERWORK IS CORRECT AND NOTHING IS MISSING, AND THEN THEY SUBMIT THE PAPERWORK TO THE ISO/BANK/PROCESSOR UNDERWRITING DEPARTMENT FOR APPROVAL.

Q: I have one processor who is willing to pay my sub-agent's directly, while paying my sales office our own % as an override. How does your CRM handle that?

OUR CRM CAN CALCULATE HOW MUCH RESIDUALS YOU GET PAID AS WELL AS YOUR SUB-AGENT, BUT YOU WILL JUST TELL YOUR SUB AGENT THE PAY WILL COME FROM THE PROCESSOR.

Q: I use a different DBA name for an association partnership. Can your CRM handle this? Can each referral form independently have a different logo and name that I want on it?

YES YOU CAN DO THIS.

Q: How much does it cost to integrate new PDF docs into the software?

The cost is $185.00 per PDF doc.

Q: Can you integrate the online application to connect with the online applications with my banks/processors system to electronically transmit the fields from Bankcard Pros CRM to my bank/processor's server automatically?

This depends on the bank/processor or ISO you are working with. We have integrated our system to submit the data from online apps to the servers for UBC, PowerPay, and First National Bank of Omaha. The costs involved to do this depends on how much work is involved, and could be around $2,000 and up to $4,000 or more in programming work depending on how complicated the task is.

Q: Regarding the User section, if I set-up a User account as a Bank Branch User Type (that's one of the selections in the drop-down menu of User Types), will the system automatically setup a basic Referral Form for the User in the online forms builder section? I didn't set it up as a Referral Partner. Is there a difference in creating this User as a Bank Branch vs. a Referral Partner?

If you setup a user in the system (and they are not a referral partner user) the users will still have a link to a referral form that you can click on in the user profile page like this: /user.php?cmd=edit_user&uid=1. And there is a section called this: **User System ID and User Links for External Applications and Forms**. And this section has a referral form link as follows: Referral Form /referral_merch.php?agent_id=71. All other users will use a generic referral form with a unique ?agent_id=1 link for visitors to fill out. When these forms are submitted, they are saved in the system in the leads section on this page: /leads.php?cmd=list&type=NEWREF. This page will show all forms received, and you will need to click on each lead and assign them to a telemarketer to call and setup an appointment for the sales rep. Or the sales rep can just manage the lead without a telemarketer and contact the lead himself.

All non-referral partner users in the system will be using the same generic referral partner form, this is what is available in the system at this time. You can manage this form here /form.php?cmd=edit_form&form_id=66733c57031b8834076a93f02548f4cc

Q: I plan to load all my customers into the CRM. What happens if I later upload a Residual Report that includes a client that I don't already have loaded in the CRM? Will I receive some kind of warning that I have "one acct too many", or does it prompt me to create a customer acct for the additional MID in the Residual Report?

When you import your residual report into the system, you will click on the PREVIEW button first before you import the data. This PREVIEW button will allow you to view all accounts that will be imported into the system. Any MID#'s that are in RED letters will alert you that either that merchant account is missing, or the MID# is missing, or if the MID# is misspelled and does not match the same MID# in the system. You will then print this page, go into the status section, and fix any accounts with red letters. When done, you will import the accounts again, click preview and all accounts should be in black letters with no alerts, and click on IMPORT and you are done.

Q: Once a Referral is submitted via a Referral Form, how do I assign it to a particular user in the software?

You will see all new referral forms received in the leads section under the New Referrals lead status. You will be able to click on each new referral lead, and assign that lead to a sales rep user and a telemarketer user as well, or both at the same time.

Q: Once I assign the referral lead to a Sales Rep user, who may view this Referral?

Because you are logged in as a system admin user, you are able to view all leads for all users. The referral leads are only able to be viewed by users you assign them to.

Q: If a Rep is a Sub-Agent of another Rep, will the higher-up Sales Rep user will able to view it as well?

As long as the user category has "network" visibility rights, that user can see all leads for themselves and all users below them that are linked directly to their user account.

Q: Once the assigned Sales Rep user contacts the Referral, I'd like for them to be able to type the notes from the contact into the CRM, so the bank and I can see the progress on the acct. How is that accomplished?

The sales rep will add notes to the lead here /leads.php?cmd=status&lead_id=1

Q: How do I upload more than one Residual Report for a particular processor for the same set of merchants? NAB, from time to time, sends me a 2nd Residual Report, to correct an error in Residuals. For instance, recently I received a small Residual Report from NAB, which added to our Oct 2010 residuals.

You will have to delete the existing report and import the new one. If your new report includes corrections to a partial list of accounts and does not include all other accounts, then you will have to upload multiple reports for the same processor for the same month/year as follows:

NAB (Feb 2011)
NAB w/Corrections (Feb 2011)

Q: My ISO/Bank/Processor posts Conversion Bonuses once per week, but they don't really supply me with an Excel Report of such. When I originally setup a merchant in the CRM, I understand I can set them up as receiving a Conversion Bonus in the future. But what if I either didn't set them up for a Conversion Bonus? Or I didn't know they will be receiving a Conversion Bonus… then we receive a bonus, such as $237.52… How do I post that to the merchant acct?

The system will automatically add the bonus to the invoice for the account but it will be in a pending status. When the bonus is actually approved and paid to you by nab, then you will change the status of the account to payroll approved. When you pay your sales rep with a check, you then change the status of the account to payroll paid.

If you do not know what the bonus amount is, then you will just manually post this to the account on this Invoice page for each account /apps_status.php?cmd=edit_app&step=agent_com&app_id=1143, in this section Add Bonus/Deduction $ to User Invoice - Current User Who Sold Account. Just add the bonus name and the amount and it will add this to the invoice.

Q: How do I post docs, such as the signed app etc, to the merchant record in the CRM?

On this page /apps_status.php?cmd=edit_app&step=docs&app_id=1143, in this section Upload New Documentation for this Customer, you will see I already uploaded a test document named Test Paperwork for you to review

Q: How do I delete a User?

On this page /user.php?cmd=edit_user&uid=76, you will change the Account Status field to Delete, and then scroll to the bottom and SAVE, and the account will be deleted. If the user you are deleteng has some 50 apps linked to that user, all apps will automatically be transferred to the system admin user.

Q: From time to time, we lose a Rep (termination, quit, etc). If the Rep hasn't earned vesting status with our company, what do I do? Do I simply go into all the former Rep's user accounts and change their Residual% to zero?

You can just change all the account statuses of those reps to INACTIVE and you can also change their residual % to 0 so the system admin user will get 100%

Q: Can I delete a User at all?

YES, On this page /user.php?cmd=edit_user&uid=76, you will change the Account Status field to Delete, and then scroll to the bottom and SAVE, and the account will be deleted. If the user you are deleting has some 50 apps linked to that user, all apps will automatically be transferred to the system admin user.

Q: Can I delete a User if they are still earning a % on a merchant account? A Bank Branch may close, which I presume may be similar to a Rep being terminated. If a Bank Branch closes, I presume I'll need to move their accts to another bank branch, correct?

It is best to just change the account status to inactive. BUT, If you choose to delete the user completely from the system, if the user you are deleting has some 50+ merchant applications linked to that user, all merchant applications will not be deleted, they will automatically be transferred to the system admin user.

Q: Rarely does this happen, but how do I handle it if one of my Sub-Agents is to be paid directly by the processor? In this event, I setup the Sub-Agent with our processor, with my company receiving an override, such as 25% of all commission paid to the Sub-Agent? How do I handle this in the CRM?

The Bankcard Pros CRM only reports what each user will earn for each month. It is up to you to notify each user who will actually be paying the sales rep by check or ACH deposit, either you or the ISO/Bank/Processor.

Q: If I want to setup a Rep with a monthly quota that's needed in order for them to receive their monthly residuals, how would I handle that? For instance, I may require that a Rep needs to board 3 new accts each month, to receive their monthly residuals.

Bankcard Pros CRM software does not track this type of monthly quota scenario.

Q: What should I do with merchant accounts that I have sold back to the processor? From time to time, we may choose to sell a residual stream, such as 20 accounts back to the processor. If I do that, I’m not due any more residuals on the acct, but I still service the acct and such. How do I handle that in the CRM?

For each of those accounts you sold, you will need to override the Residual % field for each account to show 0.00 so the system will pay the system admin and user 0.00 residuals. The override page is here /app_manager.php?cmd=add_app&step=2&app_id=1143.

And it is also located here as well /apps_status.php?cmd=edit_app&step=prof&app_id=1143

Q: It’s my understanding the CRM supports a monthly email newsletter function. How does that work? Does it send out a basic text email, or can it send out an HTML email?

The news, announcement, or newsletter feature in the system allows you to add and edit HTML formatted newsletters. It is located here /news.php?cmd=edit_news&step=edit

Q: What is involved in added a pdf doc for an additional processor or vendor? You’d previously said you could show me how to map the fields and such. What else is involved in that?

This is done in 3 steps. The first step is we have to integrate the PDF doc into the software and you are not able to do this. This requires a programmer to integrate the docs into the system. The second step you are able to do on your own, and you need to build and customize all the sections and fields for the online app, which can be done and managed here /syslists.php?cmd=list_apppages. The final step is you need to map the fields on your own, by adding mapping code names in the PDF doc to the software which is done on this page /sys_pdf.php?cmd=map_help&pdf_id=145.