

# Bankcard Pros CRM Setup and Configuration Check List

Version: September 21, 2010

PLEASE NOTE: ALL ITEMS BELOW IN **BLUE** MUST BE COMPLETED AS MINIMUM REQUIREMENTS BEFORE THE FIRST TRAINING SESSION BEGINS.

**THE CHECK LIST ITEMS BELOW THAT ARE IN BLUE PRINT ARE THE MOST IMPORTANT ITEMS TO BE COMPLETED.**

When you are completed with each item on this checklist, please mark completed or need help, and fax this document to Bankcard Pros CRM at 562-679-4636. We will review all items you need help with, schedule our first training call, and we will start the first training by reviewing all items you need help with first.

Please login to your CRM software, and then proceed to the setup and configuration page. You must read the setup and configuration guide that will teach you how to complete all check list items below.

## GET STARTED

### 1. Purchase a new domain name for your software / or use a domain name you already own.

Vendor: <http://www.godaddy.com>

Complete  Need help  Done by BCPCRM | Date \_\_\_\_\_ By \_\_\_\_\_

Domain name purchased/owned \_\_\_\_\_

**Please note:** If you are hosting on BCPCRM secure servers, you will need to change the primary and secondary name servers for your domain name to the following:

ns1.creativevisionstudio.us - and - ns2.creativevisionstudio.us

### 2. Setup a new hosting account for your CRM software with PHP/MySQL enabled

Provider: <https://creativevisionstudio.us:8443/login.php3>

What server are you going to use?  My Server  BCPCRM Server / Codero secure facility

Complete  Need help  Done by BCPCRM | Date \_\_\_\_\_ By \_\_\_\_\_

Hosting control panel access: <https://creativevisionstudio.us:8443/login.php3>

Control panel username \_\_\_\_\_ Password \_\_\_\_\_

### 3. Install, set-up, and upload data to the MySQL database.

Complete  Done by BCPCRM Date \_\_\_\_\_ By \_\_\_\_\_

MySQL database name \_\_\_\_\_ username \_\_\_\_\_ password \_\_\_\_\_

#### 4. Software installation and configuration

Complete  Done by BCPCRM Date \_\_\_\_\_ By \_\_\_\_\_

Bankcard Pros CRM Login Page \_\_\_\_\_

SystemAdmin username \_\_\_\_\_ Password \_\_\_\_\_

#### 5. Purchase SSL certificate from [www.aplus.net](http://www.aplus.net) - \$49.95 per year.

Vendor: <http://www.godaddy.com/ssl/ssl-certificates.aspx?ci=9039>

Complete  Done by BCPCRM Date \_\_\_\_\_ By \_\_\_\_\_

#### 6. Email copy of your DBA business license for SSL certificate verification/approval process.

Complete  Done by BCPCRM Date \_\_\_\_\_ By \_\_\_\_\_

#### 7. Install SSL security certificate on the server/domain name.

Complete  Done by BCPCRM Date Complete \_\_\_\_\_ By \_\_\_\_\_

#### 8. Email BCPCRM your PDF merchant app so we can integrate into your CRM (\$185 per PDF)

Complete  Done by BCPCRM Date Complete \_\_\_\_\_ By \_\_\_\_\_

#### 9. Edit the SystemAdmin user contact information with your company contact info.

Location: [http://yourdomainnamehere.com/user.php?cmd=edit\\_user&uid=MYACCOUNT](http://yourdomainnamehere.com/user.php?cmd=edit_user&uid=MYACCOUNT)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

#### 10. Edit the system contact info for your CRM software inside the setup/configuration page

Location: [http://yourdomainnamehere.com/update\\_corp.php](http://yourdomainnamehere.com/update_corp.php)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

### WHEN YOU LOGIN AS SYSTEM ADMINISTRATOR, GO TO THE SET-UP AND CONFIGURATION SECTION.

#### Edit the system wide advanced settings as follows:

11. Disable Login Access: Do you want to disable all access to the CRM for maintenance or updating?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

12. Leasing Features: Do you offer equipment leasing? Enable/Disable

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

13. Lease Calculation Option: Equip/Lease Split or Lease Split/Equip

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

14. Upfront Bonus Features: Do you pay upfront bonuses? Enable/Disable

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

15. 5-Level Residual %: Do you pay residuals based on volume? Enable/Disable

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

16. Site Login Info Section - Do you want to view the site login section info?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

17. Logo Banner Graphic - Do you want to view the logo/banner on the top of all pages?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

18. Database Backup Alerts - Do you want to be reminded to backup CRM database every 2 days?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

19. Residual Net Profits - Do you want users to see the total net profit and % you are paying them?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Leads/Telemarketing Options**

20. Delete Leads: Do you want non-admin users to delete leads?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

21. Add Lead List Names: Do you want non-admin users to create lists?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

22. Lead Statuses Categories - add, edit, rename, disable, delete lead status categories

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

23. Lead Statuses: Edit all lead status levels for each lead category

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Edit the Admin Contact Information page**

**24. Admin contact info:** Edit the content for the login page, contact, about us page, and the copyright and powered by text for the footer of the site.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**25. Upload logos/banners:** Design and upload site logo/graphic

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**26. Add/edit Admin company profile and contact information**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**27. Footer link content - change the content for all 10 footer pop up page links**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**28. Menu items - rename the navigation buttons if you want to change them**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**29. Daily quotes - add, edit, delete quotes of your choice.**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**30. Site Color Scheme: Edit and change the colors of the site layout.**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**31. Page titles - change the html page titles for each section in the software**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**32. Database Backup: Do your first backup of the database to your desktop.**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**Set-Up Basic System Options and Administrative Information**

**33. User types - add, edit, rename, disable, delete user types**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**34. User import tool - this allows you to import all your sales reps contact info into the user system**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**35. User Access Rights - Edit user rights for the following user type defaults: system administrator, administrator, technology, customer service, underwriting, sales office, sales manager, sales rep, in-house sales reps, and telemarketers.**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**36. Status levels - add, edit, rename, disable status levels (PLEASE SPEAK TO BCPCRM STAFF BEFORE USING THIS)**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**37. Status level groups - add, edit, rename, disable status level group names (PLEASE SPEAK TO BCPCRM STAFF BEFORE USING THIS)**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

38. Cancel reason options - add, edit, rename, disable, delete cancel reason options  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

39. Client status/priorities - add, edit, rename, disable, delete cancel reason options  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**40. Email Notifications: Edit the content and contact information**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

41. Import Database: use this to import your existing list of merchants  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

42. Edit Referral Form: Edit and change the graphic and content of the referral form.  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

43. Login Sessions: Nothing needs to be done on this page. This is just a report of who is logging into the software and how long.  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**Set-Up and Configure the Online Application System - User & Merchant Apps**

**44. Banks/Processors:** Edit, add, delete, change, and enable this list. You will notice a list of existing banks/processors in the system. If you use them, enable them. If you don't, just disable them.  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

45. Vendor PDF Contracts: Enable or disable all paperwork options you want to use with the software. (PLEASE SPEAK TO BCPCRM STAFF BEFORE USING THIS)  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

46. Edit User App: You can manage the entire online application by rearranging all the sections and fields of the online app to match the same order of fields that appears on your PDF merchant application. This will make it easier and save time when filling out an online application. (PLEASE SPEAK TO BCPCRM STAFF BEFORE USING THIS)  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

47. Edit Customer Apps: Here, you are able to clone existing user apps, disable advanced features and fields, and provide this link on your website so visitors can go to your sales website and fill out a short version of your full user online apps.  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

48. Online Signature Content - Please ask BCPCRM to activate this for you. You will be able to add, edit, rename, delete, change content of the online signature feature.  
 Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

49. Customer App Links - here you will edit the content of the helpful links to the online customer application link you add to your sales reps. This is the content your visitors will view as they fill out the customer app.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

50. Rates/Fees Categories: Edit this section. These items will appear on the user online app and data must match exactly what is on your PDF merchant application provided by your processor.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

51. Customer Rates/Fees: Add all rates and fees buy rates, minimum rates, and suggested rates for all banks/categories and for each business type like retail, mail order, internet, restaurant, etc.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

52. Merchant Types: Edit by adding only the merchant types that are listed on your PDF merchant application (retail, moto, internet, b2b, etc.)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

53. Edit SIC/MCC List - this is used by the internal user application, so it is important you keep this information current and up to date

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

54. Edit Merchant Types - this is used by the internal user application, so it is important you keep this information current and up to date based on your bank/processor merchant application paperwork

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**55. Ship and Install Options:** Edit install, verify, and training options for the online application.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**56. Additional Service Options:** Add/edit additional service enrollment options

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

57. Application Checklist: Here you can create a checklist of additional tasks that need to be completed for each merchant application in the system.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

58. PowerPay Options - this feature is for all sales offices who submit merchant applications to <http://www.powerpay.biz> and who are using the PowerPay online application

[http://www.powerpay.biz/announcements/application\\_Ins.htm](http://www.powerpay.biz/announcements/application_Ins.htm)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

## Set-Up and Configure Equipment/Software List

**59. Equipment Sales Tax** - enter the state sales tax % where your corporate office is located

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**60. Equipment Trade In** - configure these options if you have a free equipment trade in program you offer your merchants. if not, then skip this options.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**61. Equipment Inventory** - here you will add, edit, rename, delete all equipment and software you sell, lease, or provide for free to your merchants.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**62. Equipment Categories:** Change/edit equipment categories list such as terminal, pin pad, software

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**63. Add Equipment Items:** Add and edit equipment items to each category

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**64. Edit Equip Costs:** Change/edit equipment cost list

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**65. Equip Manufacturers:** Add/edit equipment items and manufacturers

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**66. Equip Platforms:** Change/edit equipment platform list (vital, bypass, omaha)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**67. Equip Prompts:** Edit programming options (avs, tip, auto batch, ebt, etc.)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**68. Equip Communications:** Edit communications options (dial, ip, wireless, etc.)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**69. Equip Vendors:** Edit vendors list (TASQ, Terminals Direct, Phoenix Group, etc.) This information is needed in order to fill out lease contracts.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**70. Equip Warranty Options:** Edit list of equipment warranty options

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **71. Pay Options**

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

## **Set-Up and Configure User Profits and Costs**

**72. Lease Vendors:** Add lease vendors, grades, and month terms

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**73. Lease Factors/Splits:** Change/edit lease factors and % splits

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

74. Upfront Bonuses: Change/edit up-front bonus options, by bank/processor.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

75. Starter Supplies: Change/edit starter supplies list (imprinters, imprinter tickets, etc.) - the pricing will reflect the agents costs and deducted from invoice.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

76. Shipping Options: Edit shipping options/costs - the shipping costs will reflect the agents costs and deducted from agents invoice.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **OTHER FEATURES THAT MUST BE SETUP**

**77. Edit the Recruiting Form** - this is the form you use when recruiting new sales reps so you can gather the contact information of each individual you want to join your company.

[http://your-domain-name.com/site\\_config.php?cmd=recruit\\_form](http://your-domain-name.com/site_config.php?cmd=recruit_form)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

78. Import new interchange rates and fees items for Visa, Mastercard, and Discover on this page

[http://your-domain-name.com/import\\_intquote.php](http://your-domain-name.com/import_intquote.php)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Support Section**

**79. Trouble Tickets** - edit the trouble ticket issues, statuses, and priorities before using the trouble ticket system for your employees and sales reps.

[http:// your-domain-name.com/syslists.php?cmd=list\\_ticket\\_options](http://your-domain-name.com/syslists.php?cmd=list_ticket_options)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

**80. Document Download Library** - Start building your document download library by adding a category for each bank, processor, ISO, or vendor that you are doing business with and selling their services and products, and then start uploading all paperwork, contracts, and support documents to each vendor category

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

81. Knowledgebase: Start adding new knowledge-base articles and attaching documents and forms to each article (optional).

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

82. Equipment Support: Start adding new equipment support knowledge-base articles and attaching documents and forms to each article (optional).

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

83. News Articles: Start adding news articles when you are ready and send them out to a list of recipient options.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Address Book Section**

84. Address Book - Add address book categories, and add, edit, delete new address book contacts. You can create a new address book category for each vendor you do business with, then add contact information for all contacts you have with each vendor.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Events Scheduling System**

85. At any time, you can start adding tasks/reminders, appointments, events, and holidays to the system. You can choose for all items to be viewed by admin users only, or all users in system. You can also setup one time events or recurring events as well.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

86. Edit the Holidays page. Currently, there are over 70+ holidays and you can add, edit, or delete holiday events already in the system.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Database Backup**

**87. Setup/Configuration:** Go to the setup/configuration page and perform another backup of your database. Bankcard Pros and Creative Vision Studio is not responsible for your server, domain name, software, and database, especially the loss of data. It is your responsibility to perform a database backup every day.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

### **Adding Users to the Software**

88. Admin Users: Start creating ADMIN user accounts for all your employees at your corporate office and provide them with usernames and passwords.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

89. Non-Admin Users: Start adding sales offices, sales managers, sales reps, inhouse sales reps, telemarketers, etc. user accounts to the system.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

## Residual Reports

90. Setup the residual report templates in the Profits section. You are able to create new templates for unlimited number of vendors who pay you monthly residual income.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

91. Import a test residual report with the help of Bankcard Pros so we can make sure you setup the vendor template properly.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

## Employee/User Policies and Responsibilities

92. Develop a set of in-house policies and responsibilities for your employees and outside sales reps. Consider the following options:

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

93. Who is responsible for receiving applications via Fax, Email, or eFax?

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

94. Who is responsible for underwriting and changing app statuses?

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

95. Who is responsible for importing and managing leads?

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

96. Who is responsible for boarding merchant application data? The sales rep or your staff? if you make it a requirement for all sales reps to board new merchant applications into the system, it will save your company time and money to do all the data entry.

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

97. Who is responsible for all leases received, sent to lease company, approval process, and updating the status section?

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

98. Who is responsible for equipment ordering, equipment programming, equipment shipping, or equipment reprogramming, and updating the system with new statuses when this is complete?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

99. Who is responsible for insuring paperwork is received with original signatures? Sending paperwork to the processor?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

100. Who is responsible for payroll and insuring invoices are correct?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

101. Who is responsible for importing residual reports each month?

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

Employees Responsible? \_\_\_\_\_

102. Create a new advertising campaign to announce and launch the software to your employees, sales reps, and referral partners.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

103. Launch and announce the software.

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

## USING THE SYSTEM

I have provided test links from the bankcardpros.net demo site so you can know where to go to perform the following tasks:

104. While logged in as the system administrator, fill out a test online user application. Make sure all fields are in the same order as the fields on your PDF merchant application.

**Where is this located?** [http://bankcardpros.net/app\\_manager.php?p=6&app\\_id=1736](http://bankcardpros.net/app_manager.php?p=6&app_id=1736)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

105. Go to the STATUS SECTION of the site, and review all data for the application you just submitted. You can also view the agent invoice and documentation section.

**Where is this located?** [http://bankcardpros.net/apps\\_status.php?cmd=edit\\_app&app\\_id=1732](http://bankcardpros.net/apps_status.php?cmd=edit_app&app_id=1732)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

106. Fill out a test CUSTOMER online application

**Where is this located?** [http://bankcardpros.net/app\\_manager.php?app\\_id=1737](http://bankcardpros.net/app_manager.php?app_id=1737)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

107. Fill out a test lead in the leads section

**Where is this located?** [http://bankcardpros.net/leads.php?cmd=add\\_lead](http://bankcardpros.net/leads.php?cmd=add_lead)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

108. Fill out a test trouble ticket in the trouble ticket section

**Where is this located?** [http://bankcardpros.net/tickets.php?cmd=edit&ticket\\_id=NEW](http://bankcardpros.net/tickets.php?cmd=edit&ticket_id=NEW)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

109. Fill out a test referral application

**Where is this located?** [http://bankcardpros.net/referral\\_merch.php?agent\\_id=1](http://bankcardpros.net/referral_merch.php?agent_id=1)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

110. Fill out a test recruiting form

**Where is this located?** <http://bankcardpros.net/apply/>

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

111. Add a new appointment

**Where located?** [http://bankcardpros.net/calendar.php?cmd=edit\\_event&event\\_type=Appointment](http://bankcardpros.net/calendar.php?cmd=edit_event&event_type=Appointment)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

112. Add a new task/reminder

**Where is this located?** [http://bankcardpros.net/calendar.php?cmd=edit\\_event&event\\_type=Task](http://bankcardpros.net/calendar.php?cmd=edit_event&event_type=Task)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

113. Add a new event

**Where is this located?** [http://bankcardpros.net/calendar.php?cmd=edit\\_event&event\\_type=Event](http://bankcardpros.net/calendar.php?cmd=edit_event&event_type=Event)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

114. Add a new holiday

**Where is this located?** [http://bankcardpros.net/calendar.php?cmd=edit\\_event&event\\_type=Holiday](http://bankcardpros.net/calendar.php?cmd=edit_event&event_type=Holiday)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

115. Fill out a sample rate quote

**Where is this located?** <http://bankcardpros.net/ratequote2.php?cmd=new>

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

116. Add a test user account

**Where is this located?** [http://bankcardpros.net/user.php?cmd=add\\_user](http://bankcardpros.net/user.php?cmd=add_user)

Complete  Skip  Need help Date Complete \_\_\_\_\_ By \_\_\_\_\_

117. Add a new sample news article

**Where is this located?** [http://bankcardpros.net/news.php?cmd=edit\\_news&step=edit](http://bankcardpros.net/news.php?cmd=edit_news&step=edit)

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

118. Add a new address book category

**Where is this located?** [http://bankcardpros.net/ab.php?cmd=list\\_cats](http://bankcardpros.net/ab.php?cmd=list_cats)

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

119. Add a new address book contact

**Where is this located?** [http://bankcardpros.net/ab.php?cmd=edit&cat=&contact\\_id=](http://bankcardpros.net/ab.php?cmd=edit&cat=&contact_id=)

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

120. Add a new sales quote

**Where is this located?** [http://bankcardpros.net/syslists.php?cmd=list\\_dayquotes](http://bankcardpros.net/syslists.php?cmd=list_dayquotes)

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

121. Search for a customer in the database

**Where is this located?** <http://bankcardpros.net/search.php>

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

122. Clock in or clock out of the time sheet

**Where is this located?** <http://bankcardpros.net/clock.php?cmd=show>

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_

123. Upload original paperwork and original signatures for a new merchant account received

**Where located?** [http://bankcardpros.net/apps\\_status.php?cmd=edit\\_app&step=docs&app\\_id=1732](http://bankcardpros.net/apps_status.php?cmd=edit_app&step=docs&app_id=1732)

Complete  Skip  Need help    Date Complete \_\_\_\_\_ By \_\_\_\_\_