BANKCARD PROS CRM ACCOUNT TRACKING SOFTWARE

Setup and Configuration Guide
And Complete Training Procedures

Version: 06-26-2011

For support and training, please email us at
training@bankcardpros.com
and we will schedule a training session within the same day or next day.

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Valuable Training Resources

Bankcard Pros CRM Software - Training Videos:
http://bankcardpros.com/html/training_videos___manuals.html

Bankcard Industry Links:
http://bankcardpros.com/html/industry_links.html

Valuable Online Business Tools Available:
http://bankcardpros.com/html/business_tools.html

Sample Bankcard Industry Regulations & Compliance Guidelines:
http://bankcardpros.com/html/compliance_guide.html

Leads/Appointment Setting Companies

i-Elev8 Contact Solutions
Brandy Wine Plaza West
1521 Concord Pike (US 202)
Suite 301 Wilmington Delaware 19803
Toll Free #: 888-807-4441
http://www.ielev8cs.com
You can negotiate down to $30 per appointment

TSF Enterprises
http://tsfsales.com
866-831-1199

Wholesale Marketing Solution
www.wholesalemarketingsolution.com
David Majoros - Sales Manager - Direct: (941) 312-7599
1990 Main Street Suite 750, Sarasota, FL 34236

Other Valuable Resources

Statement Stacker
https://www.statementstacker.com
3755 Corporate Woods Drive
Vestavia Hills, Alabama 35242
Phone: 888-543-6050
Fax: 888-541-1822

Merchant Recovery Services, Inc.
http://www.merchantrecovery.com
525 Plymouth Road, Suite 309, Plymouth Meeting, PA 19462
Phone: (610) 828-6438 / Fax: (610) 819-0855
Jim Schafle - (610) 828-6438 x224
jim.schafle@merchantrecovery.com

Merchant Recovery Services, Inc. is a Professional Services Company that Specializes in Providing Unique Chargeback Collection, Residual Report Auditing, and Support Services to the Credit Card Industry. Specializing in assisting high risk merchants maximize their profits.

PCI Compliance Resources and Videos

PCI Security Council
https://www.pcisecuritystandards.org

The PCI Security Standards Council is an open global forum for the ongoing development, enhancement, storage, dissemination and implementation of security standards for account data protection. The PCI Security Standards Council's mission is to enhance payment account data security by driving education and awareness of the PCI Security Standards. The organization was founded by American Express, Discover Financial Services, JCB International, MasterCard Worldwide, and Visa, Inc.

Approved PCI Compliance Scanning Vendors (ASVs)
http://www.pcicomplianceguide.org/pci-scanvendors.php

PCI Compliance and Security Solutions
https://www.controlscan.com

Control Scan
https://www.controlscan.com/pcicompliance.php

Trust Guard
http://www.trust-guard.com/PCI-scanning-s/39.htm

Security Metrics
https://www.securitymetrics.com
SecurityMetrics simplifies compliance for Payment Card Industry (PCI) Data Security Standards (DSS)

RSPA - Project PCI
http://www.gorspa.org

Social Engineering - The Art of Deception
http://www.youtube.com/watch?v=xn9hH1Bc ... annel_page

RSPA - Project PCI - YouTube Videos
http://www.youtube.com/watch?v=GEOdnJ4WS-c&mode=related&search=

and
http://www.youtube.com/watch?v=K0KtIgDfjY8&feature=related

Training Procedures and Recommendations

Welcome to Bankcard Pros CRM Account Tracking Software! Before you begin using your software, you will need to spend the first 2-4 hours setting up and configuring the software for your business. The software can be customized and private-labeled for your business so you can add your own logo, change the color scheme, and change all contact information on the footer and header sections of the software, and more.

The training process is provided to your company in a 5 step process. Some steps can be done on the same training calls.

DEVELOPING A GAME PLAN ON UTILIZING THE CRM IN YOUR COMPANY

Here are a few suggestions we highly recommend you implement with your company:

1. You have to design a game plan from day one! What do you want the CRM to do for your business. Have a meeting with your sales staff in your conference room and plan on how you will use the CRM, and how you want the CRM to allow your company to run more effectively and efficiently, reducing support calls and emails from customers, vendors, employees, and sales reps. How can the CRM save you time and money per employee? Know what you want to do and where you want your company to be in 30 days, 6 months, and 12 months before you start using the CRM software.

2. Before using the CRM, have a meeting with your employees and sales reps and assign responsibilities to everyone involved in the company. Have each department draft a list of procedures of how each department operates. Assign responsibilities to each employee so everyone knows what part of the CRM software they are responsible for.

3. Make sure you assign 1 person in your company as the manager of your CRM software, or the system administrative user. All support issues with the CRM will be directed to this 1 person This person will also be responsible for reading all support and training materials for the CRM so they know how to use and manage the CRM, how to customize, change settings, and so on.

4. Provide training videos and policies and procedures to all ouside sales reps so they will learn and understand how to do business with your company. Instead of calling or sending emails to each department, they must login to the CRM and start using the CRM to communicate. The CRM will completely automate the entire process of doing business, and expedite response times, and provide instant access to all information and documents needed for the sales reps to perform their daily tasks. No need to call or email for things the CRM already provides 24/7.

5. Avoid getting caught up in wanting to add new features and options. Try to keep the crm as simple as possible. If you overwhelm your employees and sales reps with a CRM software that has tons of features, you will find your company losing time and money in training, support, and learning how to use complicated features, when your employees and sales reps should be focused on speaking to customers, closing sales, and processing new accounts in your office. You will find your employees and sales reps spending more and more time each day on the computer using the CRM rather than doing what is important, like selling your products and services. You want a CRM that allows your employees and sales reps to complete tasks and data entry in as little steps as possible. Don’t make things too complicated. Make the CRM work smarter, not harder.

SOFTWARE MANAGER / SYSTEM ADMINISTRATOR

It is highly recommended that you assign 1 person in your company to become the manager for the software, who will be the System Administrator and will manage the entire system, the data, and insure all employees are properly trained and using the software properly on a daily basis. Any employee having issues or needs support can go through the software manager and let this person contact Bankcard Pros for support.

This works more effectively than having 10 separate people in the company sending multiple requests where most of the support requests are asking the same questions for the same support issues.

Pre-Training Requirements

Before training is provided to you, you must first complete the setup and configuration checklist on your own which should take a few hours. Most items on the checklist take time to do and it is not necessary for me to be on the phone waiting for tasks to be done that are easy, but time consuming.

1st training session

We will get on phone with you and review what is done and teach you how to do tasks you don't understand. We will make sure all sections are completed and accurate.

After the checklist is completed, We will teach you how to customize user categories, how to add new users, how to add sub-user accounts, and how the multi-level user system works.

Additional training

We will need to import all your existing clients into system. You need time to prepare this list so when it is ready, we will do the training on importing clients on this call. Every client must be linked to the correct processor name, user name, and also contain the MID# to the account.

We will train you on how to use the software, the home page section, the leads section, and the status section. I will walk you through on how to get started from importing or adding leads, working on leads, tracking all activity, selling a lead, converting lead to an online user app, and then walk you through the status section on how to view all information about an account and changing the status of an app in progress.

We will teach you how the residual reporting system works and how to prepare residual reports for importing, what data is required, and how to import residual reports.

A few important and major tasks that must be done to setup your software:

1. Complete the entire setup and configuration checklist and all steps. (See below)
2. Make sure you added all the bank/processor names into the system that you will be doing business with (or if you are still receiving residual payments from them).
3. Setup new user accounts for all employees and outside sales offices, sales reps, referral partners, etc.
4. Make sure you assign the residual payment % for each user. This field is located at the bottom of the page on the new user creation page.
5. Import your existing merchant accounts into the software.
6. Lastly, you can now design your residual report page view for each processor and import residual reports.

You must import ALL your existing merchant accounts into the software so a record will exist for all your clients. This is mandatory in order for your residual reporting system to work properly. The minimum required fields are as follows: DBA name, MID#, sales rep, processor name. It is highly recommended that you also import other data such as DBA address, city, state, zip code, phone, fax, email, website, owner name, cell phone, and so on.

Now that all previous merchant accounts exist in the software, it is also very important that you board each new merchant account into the software and provide complete and accurate information in all fields. If you do not do this on a consistent basis, you will find yourself spending hours of work at the end of the month inputting all the accounts you sold for the month. All merchant accounts are required to exist in the software so you can import residual reports and successfully generate accurate calculations and end of month reports for your sales reps.

When you import all your existing clients, you can view these clients in the status section, and all accounts imported are automatically assigned and dropped into the "Payroll Approval" status level in the status section.

Please Note: When you are viewing all your accounts in the status section, check all accounts and make sure they are all assigned the proper sales rep user account and they are all assigned to the correct Processor name. This is required in order for the residual reporting system to work properly.

Providing Customer Service and Technical Support to your sales reps and clients

Importing all your existing clients will also be very helpful when providing customer service and technical support to your sales reps as well as your merchants. You will be able to search for the client, and keep track of all activity as well as record all notes regarding the support and service you provide to your merchants and sales reps.

In the status section, you are able to log each support call for your sales reps and merchants when they call for support. You can also provide detailed notes, create trouble tickets, and create new tasks for each merchant in the status section.

Accessing Your CRM Software and Getting Started

The first step you will need to do is login to the software as the System Administrative user account. The default username and password was emailed to you when the software was installed.

When you successfully login, go to the setup/configuration page. On the gray menu bar, under the HOME menu button, you will see a Setup/Configuration option in the drop down menu to click on and go to that page.

To access the setup and configuration page and customize and configure all 70 options, go to this page: http://bankcardpros.net/configuration.php

Only the System Administrator has access to this page.

Please print out the actual checklist that includes 40-50 items for you to complete. This guide below will teach you how to complete each setup and configuration task.

The setup and configuration page allows system administrators to manage, configure, and setup all options, features, pricing, and costs for the entire system that will effect all users using the system.

The setup and configuration page provides over 70 different internal administrative features so you can customize and configure how you want the software to be used by your company and sales partners on a daily basis.

Below are the 70 different administrative features you can customize and configure, with instructions and explanations on how to use and manage all 70 features.

They are as follows:

Disable Login Access

This feature will allow you to restrict any user system wide from accessing the software, with the exception of the system administrative user. This message will appear on the login page if anyone tries to login and access your CRM software:

> **Our CRM system is down for maintenance and will be available soon. We are sorry for the inconvenience. Please contact us if you have any questions.**

Leasing Features

Does your sales office plan on selling equipment leasing services? If yes, you can enable this feature. There are sales offices that do not do equipment leasing, so all clients are able to disable all equipment leasing features throughout the entire software system by disabling this feature.

This feature allows you to enable or disable equipment lease funding and upfront lease bonus commission feature within the system, depending on which feature you want to use.

The 4 options available are as follows:

Lease %

Choose this option if you want the system to automatically calculate equipment lease funding % for all users, which is generated when an online app is submitted in the CRM

Equipment lease split can be setup and configured on this page http://bankcardpros.net/syslists.php?cmd=list_vendors_lease and can also be configured for each user on this page: http://bankcardpros.net/user.php?s=p&cmd=edit_cost&uid=

Lease Commission

Choose this option if you want the system to automatically calculate upfront lease bonus commission for all users, which is generated when an online app is submitted in the CRM

Lease commission can be setup and configured on this page http://bankcardpros.net/syslists.php?cmd=list_lbonuses

Both

Choose this option if you want to enable the Lease % and the Lease Commission feature within the CRM software

None

Choose this option if you want to disable both the Lease % and the Lease Commission feature within the CRM software

Lease Calculation Option (Enable/Disable Feature)

If you sell equipment leasing services, you can have the system calculate total lease funding in 2 ways.

Option A: Equip/Lease Split

49.95 x 48 months, A Credit Score, .0278 lease factor
50% split funding (How much sales rep gets paid) / Equipment cost = $350.00 49.95 / .0278 = 1796.76 – 350.00 = 1446.76
1446.76 x 50% lease funding split = 723.38

Option B: Lease Split/Equip

49.95 x 48 months, A Credit Score, .0278 lease factor
50% split funding (How much sales rep gets paid) / Equipment cost = $350.00
49.95 / .0278 = 1796.76 x 50% = 898.38
898.38 – 350.00 = 548.38

Upfront Bonus Features (Enable/Disable Feature)

If your business pays upfront bonuses to your sales reps, you can enable this feature. There is a feature within the setup/configuration page that will allow you to add as many upfront bonuses you want to offer your sales reps.

Upfront bonus features can be setup and configured on this page:

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

5 Level Residual % (Enable/Disable Feature)

This feature allows you to pay residuals to sales reps based on a volume performance incentive. If this feature is disabled, the residual reporting system will pay a % of residuals (no matter what amount) to all sales reps. If this feature is enabled, the system will pay up to 5 levels of a % amount based on total profit volumes.

Example, If the total residual profits off all merchant accounts is $500 or less, you can pay your sales rep 25% residuals. If the residual profits from all merchant accounts are $501 to $1000, then you can pay your sales rep 35% residuals.
If the residual profits from all merchant accounts are $1001 to $2500, then you can pay your sales rep 55% residuals. If the residual profits from all merchant accounts are $2501 or more, then you can pay your sales rep 75% residuals. This feature only allows you to set up to 5 levels.

Site Login Info Section (Enable/Disable Feature)

This feature allows you to enable or disable the top blue row that shows your business contact information on the left as well as the login information to the right. This blue row is just below the gray menu bar. So you don't have to scroll down pages so much, we added this feature to allow users to see as much information on the top of your computer screen as possible, with less scrolling.

Logo Banner Graphic (Enable/Disable Feature)

This feature allows you to hide the logo banner/graphic on the top of the site. This allows viewers to navigate back and forth between all pages of the site while eliminating the need to do so much scrolling up and down each page.

Database Backup Alerts (Enable/Disable Feature)

This feature is for system administrative user only. Every 2 days, if the system administrator does not backup the database, a red blinking backup alert box will appear as a reminder. If you do not want to see this alert, simply disable this feature.

Residual Net Profits

This feature allows you to show or hide certain data from all users in the residual reporting section. if you do not want users to see what the total net profit earned from each account as well as the User % they are earning, you can disable these columns in the residual report section. The 2 options are as follows:

View Net Profits/User %
Hide Net Profits/User %

Here is an example page of what the residual reporting page looks like:
http://bankcardpros.net/res_report.php?cmd=rep_by_merchants&AgentUID=19&Year=2010&Month=4&res_id=60

Current Language (Enable/Disable Feature)

This feature is not a fully functional feature at this time, so please disable this feature at this time. We will let you know when this feature is fully available and provide instructions and training when this is available.

CRON Task Scheduler

This is a new feature we just added to the software. There is no action or daily management or maintenance necessary on your part. CRON is a Unix/Linux program scheduler. It'll automatically execute commands on your server according to a schedule you specify. Almost anything that needs to be done according to a schedule and that doesn't need direct human supervision can be set up with Unix/Linux CRON.

For more information about how CRON works, see this site http://www.ez-response.com/howcronworks.htm

The CRON Task Scheduler program is an automatic system that will automatically send out email notification reminders to ALL users in the system reminding them that they have activity due that day. The CROM manager will run only once per day, and will send out automatic email notifications each day at 12:00 AM to all users in the system who have events/activity scheduled that is DUE that day for the following events:

1. Tasks (from the calendar/scheduling system on the home page)
2. Reminders (from the calendar/scheduling system on the home page)
3. Appointments (from the calendar/scheduling system on the home page)
4. Lead Tasks/Reminders (in the leads/telemarketing system)
5. Lead Appointments (in the leads/telemarketing system)
6. Equipment Install Appointments (in the STATUS section)
7. Equipment Reprogramming Appointments (in the STATUS section)

Bank Partner Users (Enable/Disable Feature)

This feature is not a fully functional feature at this time, so please disable this feature at this time. We will let you know when this feature is fully available and provide instructions and training when this is available.

Leads/Telemarketing Options

You can add as many status levels within each category as you choose. You cannot delete a lead status level if there are leads already assigned to that status level. You would have to delete the lead or move the lead to a new status level so you can delete the lead status level. However, you can edit and rename lead status levels.

New features in the leads and telemarketing section:

1. You can now get driving instructions/directions to the business address listed in each lead. All you have to do is click on the link provided, and it will direct you to www.mapquest.com and will automatically fill in all fields for the directions from and directions to address fields on mapquest, and submit the page for you, so you can immediately see the results and driving directions.

2. The email address and website address for each DBA name for each lead is now linked so you can click on it and immediately send an email using your Outlook Express on your computer desktop.

3. You can also do a WHOIS search on all domain names listed for the business to check and see who the owner of that domain name is. This feature directly links to http://www.networksolutions.com/whois/index.jsp, will automatically fill in the web address, and submit, so you can directly see the registrant owner is for that domain name.

4. The Letter Template within the leads system will allow you to create an unlimited number of letter templates and save them for future use. You can send a letter template, choose the template you want to use, attach up to 5 documents to the letter template, and send.

5. FAXING Capability. This feature is coming soon. This will give you the option to not only email the letter template and up to 5 attached documents, but will also allow you to fax the letter template and attached documents to the DBA owner. This feature will require you to setup an account with a fax provider, and there will be monthly fees associated with using this faxing capabilities with them.

Delete Leads (Enable/Disable Feature)

This is a feature that allows you to control the users ability to delete leads from the leads and telemarketing system. If you do not want users to delete leads from the system, you will enable this feature. This will prevent all non-administrative users from deleting leads.

Add Lead List Names (Enable/Disable Feature)

Go to this page to manage the lead list names
http://bankcardpros.net/syslists.php?cmd=list_lead_options

All leads are assigned to a lead list name. A lead list name is a way you can keep track of the source of the leads, or where they came from. When you take advantage of the lead list name feature, you are able to later do a search and track the results of all leads based on where they came from. So if you find that leads are not closing well from one source, you can stop spending a lot of money to purchase the leads from that source.

When speaking to businesses on the phone who call you, always ask how they heard about you, and keep track of how customers hear about you, so you can track results at the end of each month. When knowing this valuable information, you can choose to budget more money in the resources that work best for your company.

Leads can come from the following sources:

Friends
Referral Partners
Phone calls
Yellow pages
Assumed Name / DBA names / LLC from County Clerk offices
Existing customers
Post card
Newsletter
Newspaper ads
Radio ad
Printing Companies
CPA's
Google search (or other search engine)
Sales Genie
Telemarketing firm setting appointments for you
InfoUSA
Experian
Dunn and Bradstreet
GoLeads
ZapData
Business.com
USA Data
BizJournals
Chamber of Commerce
Network Meetings
Buyer Zone
Inc.com
Hoovers

This is a feature that allows you to control the users ability to ADD lead list names from the leads and telemarketing system. If you do not want users to ADD lead list names from the system, you will enable this feature. This will prevent all non-administrative users from ADDING lead list names.

Lead Status Categories

The lead status categories are system categories that cannot be deleted, and you cannot add any additional categories. You are able to edit the lead category names, and that is all.

You can go to this page to edit the lead status category names:
http://bankcardpros.net/syslists.php?cmd=list_leads_statuscats

The default 6 lead status category names are:

NEW LEADS
WORKING LEADS
LEADS CONTACTED
QUALIFIED/HOT LEADS

SOLD/PENDING
DEAD LEADS

Lead Status Levels

You can go to this page to manage all lead status names within all 6 lead status categories
http://bankcardpros.net/syslists.php?cmd=list_leads_statuses

This feature allows you to add, edit, or delete lead status levels within each of the 6 status categories.

SETTING UP BASIC SYSTEM OPTIONS

Admin Contact Information

It is extremely important that the system contact information below be properly filled out with accurate and up to date information. This contact information is used by all system email notifications in the email "SUBJECT" and "TO" fields sent out to users and customers.

This page allows you to add your business contact information, as well as upload your own logos or banner graphics for the following: system logo/graphic, merchant application logo/graphic, referral form logo/graphic, and the recruiting page logo/graphic.

You can click on the View button to view the page so you can make sure your logo or banner graphic was uploaded and saved successfully. You will also be able to add your own system description like ABC Merchant Services Sales Portal.

Admin Contact Information

It is extremely important that the system contact information below be properly filled out with accurate and up to date information. This contact information is used by all system email notifications in the email "SUBJECT" and "TO" fields sent out to users and customers.

This page allows you to add your business contact information, as well as upload your own logos or banner graphics for the following: system logo/graphic, merchant application logo/graphic, referral form logo/graphic, and the recruiting page logo/graphic.

You can click on the View button to view the page so you can make sure your logo or banner graphic was uploaded and saved successfully. You will also be able to add your own system description like ABC Merchant Services Sales Portal.

You can also apply all contact info settings for the SystemAdmin user account to this page.

You can also label the software with a name by adding it to the System Description field. Example: Bankcard Pros CRM Account Tracking Software 2010

Admin Company Profile

This feature allows you to add your own content on the following pages: about us page, contact us page, login page, as well as adding your own text/content for the copyright and powered by rows on the footer of all pages within the software. If you do not know where the login, contact, or about us pages are located, they are here:

A. http://www.yourdomainnamehere.net/login.php
B. http://www.yourdomainnamehere.net/site_config.php?cmd=show&code=aboutus
C. http://www.yourdomainnamehere.net/site_config.php?cmd=show&code=contactus

Footer Page Links

You are able to enable or disable footer links. You can add content to all the links at the bottom of the site (footer) as follows:

- About
- Contact
- Support
- Careers
- Referrals
- Terms of Service
- Legal
- Privacy
- Security
- Protect Your PC
- Protect Your Business
- PCI Security Standards
- Visa CISP
- MasterCard SDP
- Discover Network DISC
- Trust Wave

Upload Logos and Banners

On this page you can upload the following logos/banners:

- Customer App Logo/Graphic
- Referral Form Logo/Graphic
- Recruiting Page Logo
- SSL Security Certificate Provider Information

Menu Items

You are now able to rename the menu buttons, as well as change the order of the gray navigational menu buttons on the top of each page of the CRM software. This feature allows you to edit the gray menu bar page titles which are as follows:

Home
Leads
Quotes
Status
Profits
Reports
Users
Support

Daily Quotes

This feature allows you to add as many motivational or leadership quotes as you desire that will appear on the home page. the quotes rotate one at a time on the home page.

Example quotes:

"The difference between a successful person and others is not a lack of strength, not a lack of knowledge, but rather in a lack of will." - Vincent T. Lombardi

"If you don't know where you are going, you might wind up someplace else." - Yogi Berra

"Think of yourself as a resource to your clients; an advisor, counselor, mentor, and friend." - Brian Tracy

Site Color Scheme

This feature allows you to change and edit the color scheme to the header, footer, and left link menu, and so on You are able to change the colors of up to 8 components of the software.

Page Titles (HTML Search Engine Page Titles)

This option allows you to change the HTML page title that shows up in the search engine directories like Google, Yahoo, etc.

The HTML page titles you can change are as follows:

1. Default Title
2. Login Page
3. Home Page
4. Configuration
5. Leads Section
6. Status Section
7. Profits Section
8. Merchants
9. Users Section
10. Rate Quotes
11. Support section

Database Backup

This feature is only available to the system administrator and it is your legal responsibility to make sure you backup your database on a daily or weekly basis. The instructions for doing this is simple, and you can just follow the 2 step process provided in this feature.

The database backup feature will also allow you to view reports of when each backup was done, and by who, including the following information:

User name
Date and time
IP address
File size
A link to allow you to download the most recent backup completed

It is your full responsibility to backup the MySQL software database data on a daily basis. The backup file is downloaded and saved on your computer (other than the server where the software files are located and running) and is saved as a text .txt file. CVS is not responsible for loss of data, regardless of where the software is being hosted.

You will be responsible for making daily backups of database system and the software files on separate computer workstation, safe and secure from duplication or distribution of any employee or outside individual. If hardware fails resulting in complete loss of entire software and all files, CVS will install new software and restore database backup within 48 hours after you have restored the hardware to working condition.

User Types

This feature allows you to customize your list of user type categories in the system.Every user is assigned to a user type category.When you are done adding, deleting, or editing existing user type categories, you MUST go to the User Access Rights section and enable these user type categories for each user or bulk users.You can also change the order of each user type category, enable/disable the user type category, and also assign the user type category as an Admin or User classification.

User type categories:

http://bankcardpros.net/syslists.php?cmd=list_usertypes

Results of editing and customizing user type categories can be viewed here:
http://bankcardpros.net/user.php?cmd=list_users

Example user type categories are as follows:

1. System Administrator
2. Administrative
3. Technology
4. Underwriting
5. Sales Office
6. Sales Manager
7. Sales Rep
8. Inside Sales Rep
9. Bank Referrals
10. CPA Referrals
11. Referral Partners
12. Telemarketers

User Import Tool

This feature allows you to import multiple user accounts into the system so you do not have to setup each user account one at a time. You must have all your sales reps names and contact info in Excel format to include the following sample fields:

Name
Address
City
State
Zip
Phone
Cell Phone
Fax
Toll Free
Username
Website
Email

When you have successfully imported all your user accounts, you will see all your accounts in the user section in the Incomplete User status page here:
http://bankcardpros.net/user.php?type=INCOMPLETE

Once you have entered a temporary password, residual % settings, and other user settings, and submit, the user account will be successfully saved in an active status.

You can view all active user accounts here:

http://bankcardpros.net/user.php?type=all

User Access Rights

This feature 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. You must setup this feature before you setup user accounts.

You must customize the default settings for all user types and save the settings before adding new users to the system. When you add a new user, the system will automatically set that user up with the default settings for their user type that you customized for them.

Status Levels

Instructions: Before you add, edit, delete, or enable/disable status levels, you can edit the status level groups in the setup/configuration section first. The status levels below are already built into the software and they include fields and options for each status level. So you should not reuse existing status levels below and rename them to use for another purpose.

Example: If the status level below is already labeled "Approved", do not rename it to "Declined." If you need to add a new status level for a status not shown in the list below, just add a new status level and add it to the Status Group you want it to belong to.

The existing status levels below are already in the system as system status levels, and the fields allow you to rename them if you want to do that.

Example: If you want to rename "Approved" you can rename it to "App Approved"

Status levels can be managed here:
http://bankcardpros.net/syslists.php?cmd=list_statuses

The results of the status levels can be viewed on this page:
http://bankcardpros.net/apps_status.php

Status Level Groups

Status level groups can be managed and setup on this page
http://bankcardpros.net/syslists.php?cmd=list_statusgroups

Status level groups include the following group names:

Pre-Boarding
Underwriting
Equipment Leasing
ATM Products
Merchant Cash Advance
Implementation
Relationship Mgmt

You can view the results of your status level groups in the STATUS section on the left menu column of this page
http://bankcardpros.net/apps_status.php

Once you setup the status level groups you want to use, you can now manage and edit all status levels for each group on this page:
http://bankcardpros.net/syslists.php?cmd=list_statuses

Cancel Reason Options

This is a feature available in the status section. Select a merchant application that is “in progress” then click on the “Status” button, then scroll down to the last status level called “14. Cancel” and you will be able to view your options.

You can manage the cancellation reason content on this page:
http://bankcardpros.net/syslists.php?cmd=list_cancelreasons

The results of editing or adding cancel reasons can be viewed on this page:
http://bankcardpros.net/status_changer.php?app_id=1041
Then scroll all the way down to the status level “14. Cancel” and you can see your options in the drop down menu

Client Statuses/Priorities

This is a new feature we added to the software in the STATUS section so it will alert all users, administrators, and employees of any issues with any merchant account. If the status of any account is negative, it will alert you so you can inform the merchant that existing issues with their account must first be resolved before you can provide any service or support to that merchant or sales rep.

http://bankcardpros.net/syslists.php?cmd=list_client_options
Status levels include

GOOD STANDING - No Issues
WARNING - Previous Billing Issues
WARNING - Previous Chargeback Issues
CAUTION - Update Contact Information Immediately / Mail Returned
STOP - Chargebacks Must Be Resolved
STOP - Billing Rejects/NSF's Must Be Resolved
STOP - Fraudulent Transactions / Transfer To Manager

Client priorities include:

Low - Inactive Merchant, Not Processing
Medium - Active Merchant, Low Processing Volume $10k<
Average - Active Merchant, Medium Processing Volume $10k-25k
High - Active Merchant, High Processing Volume $25k>
Priority - High Processing Volume (Provide Priority Support)

The results for client statuses and priorities can be viewed for each client account here:
http://bankcardpros.net/apps_status.php?cmd=edit_app&app_id=1545

Email Notifications

This feature allows you to setup, edit, and customize the content of all 19 different email notifications available within the software. Example, when a new application is entered into the software, the system will automatically send out an email notification to the merchant, the sales rep, and the system administrator. You can choose to enable/disable the email from going to one of these 3 recipients.

You are able to enable or disable any or all email notifications within the system. If you disable any email notification, then it will be completely disabled so no one will receive an email.

Email notification options:

Status

Choose which status level you want the emails to go out to set recipients

Most email notifications have the following recipient options:

Administrative Users

You can choose admin users to receive a copy of the emails

Customer

You can allow the DBA Business owner to receive a copy of the email

App Owner

This is the sales rep who sold the account

Telemarketer Owner

This is the telemarketer user who setup the lead and appointment

Types of email notifications available:

New User Welcome - an email is automatically sent to the user that created the new user, to the user who was created, as well as the option to choose which admin users you want to receive an email.

New Recruit Inquiry - an email is automatically sent to a list of admin users you want to receive an email.

New Referral Form Received - an email is automatically sent to the user that the form is generated for receiving the new referral lead.

Trouble Ticket - an email is automatically sent to the user that created the trouble ticket as well as who the trouble ticket was assigned to.

Birthday Wishes – an email is automatically sent to the recipient the email is sent out to. The user creating the birthday can choose from a list of recipients in the following categories: Merchants, leads, vendors,

News & Announcements – an email is automatically sent to the recipient the email is sent out to. The user creating the birthday can choose from a list of recipients in the following categories: Merchants, administrative users, non-admin users, user type categories, address book categories, and address book types.

Application Status Notifications

New User App
New App Notes
Merchant App Approved
New App PDF Links
New App Status Change
Technology Users
Customer Service Users
Underwriting Users
Install Appointment
Reprogram Appointment

Leads/Telemarketing System Notifications

New Lead - an email is automatically sent to the user that created the new lead, as well as the option to choose which admin users you want to receive an email.

Lead Appt Reminder - an email is automatically sent to the user that created the new lead appointment as well as who the appointment was assigned to.

Lead Task Reminder - an email is automatically sent to the user that created the new lead task reminder as well as who the appointment was assigned to.

Email Notification - Field Codes Available to Use

Notification Email Field Codes	
{$BusinessPhone}	Phone #
{$BusinessWebsite}	Website Address
{$BankContact}	Bank Contact
{$BankABA}	ABA Routing Number
{$BankPhone}	Bank Phone Number

{$BusinessName}	Clients Business Name
{$OwnerDOB}	Date of Birth
{$BankDDA}	DDA Checking Account #
{$BankName}	Depository Bank
{$OwnerDL}	Drivers License #
{$OwnerDL2}	Drivers License #
{$OwnerPercentage}	Equity/Ownership %
{$OwnerPercentage2}	Equity/Ownership %
{$OwnerPhone2}	HomePhone
{$OwnerFirstName2}	Owner First Name
{$OwnerAddress2}	Owner Home Address
{$OwnerTitle}	Owner Title
{$OwnerTitle2}	Owner Title
{$OwnerPhone}	Phone No.
{$OwnerFirstName}	Principal Name (Print)
{$OwnerState}	State
{$BusinessAddress}	Statement and Mailing Address
{$BusinessZip}	Zip Code
{$OwnerFirstName}	Owner First Name
{$OwnerName}	Owner #1 Full Name
{$OwnerName2}	Owner #2 Full Name
Get Started	
{$MerchantType}	Merchant Type
{$LocationType}	App Type
{$BusinessName}	DBA Name
{$BusinessContactName}	Owner Name
{$BusinessPhone}	Office Phone
{$BusinessEmail}	Email Address
{$BusinessSIC}	SIC/MCC #
Merchant Info	
{$BusinessCity}	City
{$BusinessState}	State
{$BusinessFax}	Fax #
{$BusinessEmail}	Email Address
{$BusinessAddress}	Location Address
{$BusinessSuite}	Suite
{$BusinessContactName}	Contact Name
{$BusinessTollPhone}	Toll Free #
{$BusinessCellPhone}	Cell Phone #

{$OwnerAddress}	Residence Address
{$OwnerCity}	City
{$OwnerZip}	Zip
{$OwnerSSN}	Social Security #
{$OwnerLastName}	Owner Last Name
{$OwnerDLState}	Drivers License State
{$OwnerCity2}	City
{$OwnerState2}	State
{$OwnerZip2}	Zip
{$OwnerDOB2}	Date of Birth
{$OwnerSSN2}	Social Security #
{$OwnerLastName2}	Owner Last Name
{$OwnerDLState2}	Drivers License State
{$BusinessTaxID}	Federal Tax ID Number
References	
{$BankAccountType}	Account Type
Equipment Options. Usage: {foreach from=$listEquip item=item} ... {/foreach}	
{$item.eqTID}	TID #
{$item.eqSN}	Serial #
{$item.eqApplicationID}	Application ID
{$item.eqTerminalSetup}	Terminal Setup
{$item.eqDateInstalled}	Date Installed
{$item.eqLeaseStartDate}	Lease Start Date
{$item.eqLeaseEndDate}	Lease End Date
{$item.eqWarrantyOption}	Warranty Option
{$item.eqWarrantyDate}	Warranty Start Date
{$item.eqWarrantyEndDate}	Warranty End Date
{$item.eqPrinterReceiptHeader}	Printer Receipt Header
{$item.eqDownloadPhone}	Download Phone
{$item.eqSecondaryPhone}	Secondary Phone
{$item.eqDialPrefix}	Dial Prefix
{$item.eqCallWaiting}	Call Waiting
{$item.eqAutoCloseTime}	Auto Close Time
{$item.eqTimeZone}	Time Zone
{$item.eqReturnPolicy}	Return Policy On Receipt
{$item.eqNuritNOSVersion}	If Nurit, NOS Version
{$item.eqManualImprinter}	Manual Imprinter
{$item.eqImprinterPlates}	Imprinter Plates
{$item.eqTips}	Tips

{$item.eqSplitDial}	Split Dial
{$item.eqCVV}	CVV
{$item.eqAVS}	AVS
{$item.eqComments}	Notes/Comments Regarding This Equipment Item
{$item.eqProgrammedBy}	Programmed By
{$item.eqShippedBy}	Shipped By
{$item.eqTrainedBy}	Trained By
Software Options. Usage: {foreach from=$listSoft item=item} ... {/foreach}	
{$item.swSoftwareType}	Software Type
{$item.swVersion}	Version
{$item.swUrl}	URL Site Login
{$item.swLogin}	Login Username
{$item.swPassword}	Login Password
{$item.swPaymentGateway}	Payment Gateway #
{$item.swReference}	Reference #
{$item.swAccount}	Account #
{$item.swBin}	Bin #
{$item.swAgentBank}	Agent Bank #
{$item.swCategoryCode}	Category Code
{$item.swStore}	Store #
{$item.swTerminal}	Terminal #
{$item.swClient}	Client #
{$item.swTID}	Terminal ID
{$item.swStoreKey}	Store Key
{$item.swStoreID}	Store ID
{$item.swCIM}	Customer Information Manager (CIM)
{$item.swECC}	Expanded Credit Capabilities (ECC)
{$item.swVMS}	Verified Customer Seal
{$item.swRecurringBill}	Recurring Billing?
{$item.swFraud}	Fraud Detection?
{$item.swECheck}	eCheck Service
Equip Options	
{$fcQtyEquipment}	Equipment Sold (qty)
{$fcExpEquipment}	Equipment Sold (explanation)
{$fcQtyApp}	App Fee (qty)
{$fcExpApp}	App Fee (explanation)
{$fcQtyAppRush}	App Rush Fee (qty)
{$fcExpAppRush}	App Rush Fee (explanation)
{$fcQtyDiscover}	Discover App Fee (qty)

{$fcExpDiscover}	Discover App Fee (explanation)
{$fcQtyReprogram}	Reprogram Fee (qty)
{$fcExpReprogram}	Reprogram Fee (explanation)
{$fcExpSetup}	Set-Up Fee (explanation)
{$fcQtyRental}	Rental Deposit (qty)
{$fcExpRental}	Rental Deposit (explanation)
{$fcQtyApplicable}	Applicable Tax (qty)
{$fcExpApplicable}	Applicable Tax (explanation)
{$fcQtyOther1}	Other Fee 1 (qty)
{$fcExpOther1}	Other Fee 1 (explanation)
{$fcQtyOther2}	Other Fee 2 (qty)
{$fcExpOther1}	Other Fee 2 (explanation)
User Info Codes	
{$AgentId}	User ID
{$AgentName}	User Name
{$AgentEmail}	User Email Address
{$AgentFromEmail}	Sender 'From' Name and Email Address
{$AgentPhone}	User Office Phone Number
{$AgentPhoneExt}	User Office Phone Ext
{$AgentCellPhone}	User Cell Phone
{$AgentAddress}	User Address
{$AgentCity}	User City
{$AgentState}	User State
{$AgentZip}	User Zip
{$AgentBusinessName}	User Business Name
{$AgentFax}	User Fax
{$AgentBankName}	User Bank Name
{$RepNumber}	User Office Number

Import Database

This feature allows you to import the contact information of your existing merchant accounts within a few minutes. You must have your accounts in an Excel document, copy all the accounts, and paste them using this feature, then map the fields, and finish the import process. In order for residual reporting to work, you must have DBA name and MID fields.

How to import your existing customer database into the system:

The following instructions must be followed to successfully import your existing customer database into the system:

1. Make sure your excel document is ready for importing. Each excel document must include the following minimum columns in order for the system to import, sort, and calculate residual % for each user properly:

a. DBA Name
b. MID #
c. Bank/Processor Name
d. Sales rep name

Most companies will want to import more data as follows:

a. DBA Name
b. MID #
c. Bank/Processor Name
d. Address
e. City
f. State
g. Zip
h. Phone
i. Fax
j. Email
k. Website
l. Owners Name

2. Open your excel document, and highlight all columns and rows (including column titles) for all accounts in your excel document.

3. Copy all the highlighted rows and columns (or select the CTRL + C key at the same time) in your excel document.

4. Now go to the Database Import Page within the CRM website here: http://bankcardpros.net/import_app.php

5. In the empty/blank field box, paste (or select the CTRL + V key at the same time) the copied data in the blank field, and click on the NEXT button

6. This page will show you all the database column fields available in your excel document based on how you setup the page. You will map these database column fields with the proper columns that are in your Excel document.

7. Click on the preview button to preview all accounts that will be imported.

8. Now go ahead and click on the IMPORT button, and it will alert you as to how many accounts were successfully imported into the system.

9. All the accounts will import as default to the PAYROLL APPROVAL STATUS level. You can also create a new column in your excel document and add a different status level name if you want the accounts to import in a different status level.

10. When you successfully import your report, you can view the report results here: http://bankcardpros.net/apps_status.php?cmd=list&type=payroll approved

Edit Referral Form

This feature allows you to customize and edit the content of your referral form so you can have referral partners and merchants send you referrals at any time.

To view this form, you would go to this page: https://www.bankcardpros.net/referral_merch.php?agent_id=1

To edit the content of the referral form, go to this page http://bankcardpros.net/site_config.php?cmd=ref_form

To edit the email notification for the referral form, go to this page http://bankcardpros.net/email.php?cmd=edit_mails&notification_id=21

Login Sessions

This feature allows you to view when users login to the software, how long the session lasted, and show the IP address, including the location city and state of the user that logged in.

To view a complete history of all login sessions for all users, go here:
http://bankcardpros.net/logins.php

Language Options

This feature allows you to translate all text of the entire system in multiple languages. This feature is not a fully functional feature at this time, so please disable this feature at this time. We will let you know when this feature is fully available and provide instructions and training when this is available.

ONLINE APPLICATION SYSTEM - USER / MERCHANT APPLICATION

Banks/Processors

This feature allows you to add as many bank/processors as you choose. Most clients using the Bankcard Pros software are doing business with 3-4 different banks/processors that they send merchant accounts for processing. This feature will allow you to add and customize multiple online applications within the software for each bank/processor. When users login to your software, and they start filling out a new online merchant account application, they will have a drop down menu field so they can choose what bank/processor the merchant application will be sent for approval.

This feature also allows you to add an email address for the relationship manager of the bank/processor so you can email documentation to that contact, set the bank/processor as the default online application, enable/disable the online application, or delete the online application of you do not use it any longer. When this step is done, you will need to edit the user online application and the merchant online application next, and customize the pages and fields to match the same fields and order as on your paperwork.

Currently, we have 60 total Bank/Processors integrated into the system. For your convenience and to save you time, we have customized the online application pages, sections, and fields for 60 Banks/Processors in the system so the fields in the online application match the same fields and the same order as your Merchant Application PDF document provided to you by your ISO/Bank/Processor.

Because we have already customized the online application and integrated the PDF merchant application into the system, we have disabled each Bank/Processor so you are unable to edit or delete any of them. You will notice the names are grayed out and you are unable to edit or delete.

BEFORE USING THESE NEW FEATURES, MAKE SURE YOU COMPLETE A FULL DATABASE BACKUP OF THE ENTIRE MYSQL DATABASE.

Instructions: This page allows you to add, edit, manage, and customize new and unlimited online user applications for each ISO/Bank/Processor that you are submitting accounts to. These user online applications are for in-house use by your employees and sales partners in order to board new client account details into your CRM software.

When you add new ISO/Bank/Processor names of the companies you are submitting accounts, you are able to edit/customize the fields for each online application to match the fields of the PDF application.

When you create a NEW Bank/Processor name to this system, the system will automatically apply all pages, sections, and fields of the application called [* BankCardPros - Default App] to the new bank/processor name you added. This will save you alof of time from having to build the online app and add 100-200 fields manually from the start. All you will have to do is just edit, rearrange, or delete pages, sections, or fields you don't need.

(1) Processor Name: Add the name of the ISO/Bank/Processor you are submitting accounts.

(2) Edit: Customize the online application for each ISO/Bank/Processor.

(3) PDF Date: The last date you updated your PDF doc attached to that online application.

(4) ISO Email Contact: The email address of the contact person of the ISO/Bank/Processor that will accept original paperwork via email

(5) Def (Default): Select which online app you want to use as the default online application.

(6) Use (Enable): Select online applications you want to use/enable within your software.

(7) Del: If you are no longer going to use any online application, you can delete it from the system.

Editing Existing Online Applications:

In order to edit the existing names of Bank/Processors (that appear in gray letters that cannot be edited), you would simply enter this after your domain name in your Internet Explorer browser:

/?setup-mode=1

To disable this feature, you would simply enter this after your domain name in your Internet Explorer browser:

/?setup-mode=0

The software allows you to add and customize an unlimited number of Bank/Processors to the software. If you already customized the pages, sections, rates and fees, and fields of an online application for a specific Bank/Processor, you can now export all those settings for the online application and then duplicate those exact pages, sections, rates and fees, and fields to any other Bank/Processor you added to the system. This will save you time where you will just need to edit the pages, sections, and fields, instead of having to start from the beginning and add and organize some 100-200 fields for a new online application. Call Bankcard Pros CRM Staff for details and further explanation.

This new feature was designed to save you a lot of time, especially for those customers who need to add and customize 4-5 user online applications. In order to add, edit, and customize an online application, it could take you up to 1-2 hours to finish customizing just 1 user online application. This new feature will allow you to customize new user online applications in LESS than an hour.

In order to EXPORT the pages, sections, rates and fees, and fields for An EXISTING user online application into a data file and save it on your desktop, you would simply enter this after your domain name in your Internet Explorer browser:

/run/bank_export.php

In order to IMPORT the pages, sections, rates and fees, and fields for a specific online application to a NEW Bank/Processor you just added to the system, you would simply enter this after your domain name in your Internet Explorer browser:

/run/bank_import.php

Please Note: This feature is for advanced system administrative users only. If you do not know or understand what you are doing, do not use this feature and call Bankcard Pros CRM staff for assistance and further training. Not knowing what you are doing could cause your USER ONLINE APPS to become not-usable or deleted and could take a few days to fix.

BEFORE USING THESE NEW FEATURES, MAKE SURE YOU COMPLETE A FULL DATABASE BACKUP OF THE ENTIRE MYSQL DATABASE.

Vendor PDF Contracts

This feature allows you to add multiple vendor services like check processing, gift cards, working capital, payment gateway, etc. You can also upload paperwork for each new vendor. When this is completed, each user will be able to choose additional services enrollment options on the user online app, step 2, Service request page, for the online merchant application they are filling out for their new merchant. This will allow the sales rep and your business to lookup a new or existing merchant in the system, and be able to view a summary of all the services and products the merchant purchased or enrolled. This feature allows you to add a new vendor section to the online application service request section, link it to a bank/processor, then upload the PDF documents for that new vendor, map fields, and then enable the vendor to work on the online application service request page. When you use this feature to add new vendors, they will show up on the user online app, step 2, service request page.

Step 1: Add New Vendor Categories

http://bankcardpros.net/sys_pdf.php?cmd=list_pdf_categories

Add a new category title name and click "Add New." Step 2: Add a short titled code name to the new category you created. Step 3: Under the Processor or Vendor category, link the category you created to the matching Bank/Processor name for this category. If the Bank/Processor name is not listed in the drop down menu, you will need to go to the Setup/Configuration section, then click on the Bank/Processors option, and add the new Bank/Processor name and click on save. If the new Category is not for a specific Bank/Processor and is for an added-value service provider such as check services, gift cards, etc., and choose this option in the drop down menu "Vendor Category Only." Step 4: You are now done with this page, you can now go to the next page called "Add New Docs" and you can now add as many document names and attachments to this new Category you just created on this page.

Step 2: Add New PDF Documents (Merchant Processing Agreements)

http://bankcardpros.net/sys_pdf.php?cmd=list_pdf_docs

On this page, you can add as many PDF documents to each new category you created in the system. You will simply fill in the title of the documents you want to upload, link this title to the Category you created, upload the PDF document for this title, and then click on "Upload" and you are done. On this page, you will also be able to click on the "Map" link for the document you uploaded, and you will be able to map all fields on the PDF document with the fields in the system. Contact Bankcard Pros Support for information on how to unlock and edit the titles and sections below that will not allow you to edit or delete the settings.

Step 3: Enable Vendors

http://bankcardpros.net/syslists.php?cmd=pdfoptions

This page will show all available Bank/Processor and/or Value Added Service Provider/Vendor Categories and PDF attachments available for the User Online Application system. When you activate/enable an option below, these categories/options will appear and become available to choose as options in the "Step 2: Service Request" page of the User Online Application. The PDF forms and contracts will be automatically be activated for the Customer account application submitted and available for viewing and/or downloading (the fields in the PDF contracts will be automatically populated with data entered in the User Online App) in the STATUS section. An email notification will be sent to the designated recipients upon submission of a new User Online App.

When you are done adding new vendors and adding and enabling documents, the results will show up on this page of each online user application:

http://bankcardpros.net/app_manager.php?step=page&p=7&app_id=1617

Edit User Apps

You must add your banks/processor names to the Bank/Processors section before using this feature. After you add a new bank/processor to the system, you can use this feature to edit and customize the order of all fields, sections, and pages of the online application so it will match the same order as your PDF merchant application paperwork.

This will make it very easy for your sales reps or employees to fill out each online application. Almost all banks/processors use different paperwork, with different fields, different pages, and different content. This feature allows you to add sections, add fields, enable fields, and change the order of all fields within a section or page.

Please do not get the user online app confused with the merchant online application. On each page of Bankcard Pros software, you will see 2 gray buttons called Submit User App and View Merchant App. The Submit User app is the full application that matches your PDF merchant application documents and is to be filled out by your sales reps or employees only, and can only be accessed by logging in.

The View Merchant App is a button you can click on to view the merchant application that your merchants will have access to. This link is what you put on your website so clients can click on and fill out the online app. The merchant application is a shorter version of the User Online App.

Integrate your PDF documents (Merchant Processing Agreements)
If you want to integrate your PDF documents into the software, this is a task that must be completed by Bankcard Pros as well as your staff. When a PDF document is integrated into the software, your sales reps, merchants, and staff will be able to download the PDF document for each online app submitted, where all the fields on the PDF document will be automatically populated by the software.

Integrating a PDF document is done in 4 different steps as follows:

1. Add a bank/processor name (done by your staff) - 2 minutes
2. Integrate the PDF document into the software (done by Bankcard Pros Programmers) - 1.5 hours
3. Customize the online application pages, sections, and fields (done by your staff) - 1 hour
4. Map the fields of the online app to the fields on the PDF document (done by your staff) - 1 hour

If this process is too complicated to be completed by your staff, Bankcard Pros programmers can do all 4 steps for you for an additional charge. Please refer to your contract agreement.

Edit Merchant Apps

Once you have customized all the user online apps in the system, you can now clone the user online app, and create a merchant online application. This feature allows you to clone all the settings of a user online app to save you time. Because business owners are unable to understand and fill out a complete merchant application on their own, you are able to disable the technical pages and fields of the online application, and create a short-version merchant application to include 1-2 pages. Business owners will not know how to answer fields that ask for technical information that is foreign to them, resulting in them from not completing an online app and losing sales.

This feature allows you to add, edit, and customize the content of the help and support pages that are available on the online merchant application. The merchant online application can be viewed at the following link:

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

On the merchant application page you will see the following helpful links: requirements, FAQ's, glossary, fees explanation, agreement and terms, and contact us pages. You can edit the content of these pages.

Online Signature Content

You can activate this feature for any merchant online application so your customers can sign the application in the box provided, save the form, and the system will save the image of the customers signature.

If you want to use this feature, contact Bankcard Pros and we will activate this feature for you.

Merchant App Links

This section allows you to edit the content of your online merchant application, including the following pages:

1. Welcome page
2. Success page
3. Requirements
4. FAQ's
5. Glossary of terms
6. Fees explanation
7. Agreement and terms
8. Contact information

You can edit all the content of the above pages on this page:
http://bankcardpros.net/site_config.php?cmd=merchapp_form

The results of the content you add or edit can be viewed on this page:
http://bankcardpros.net/app_manager.php?cmd=add_app&app_id=NEWMERCH

Rates/Fees Categories

After you added new bank/processor names, and customized fields for all user online apps, you will need to customize and add rates and fees items and values for each user online app so the rates and fees items match what is on your PDF merchant application paperwork. This feature allows you to add all rates and fees items only.

Merchant Rates/Fees

After you added a complete list of all your rates and fees categories for each bank/processor, next, you will need to add default values for each rates and fees items. There will be a complete set of values for rates and fees items for each bank/processor in the system, and for each merchant type in the system such as retail, mail order, internet, restaurant, etc. If you have 5 banks/processors, and 6 different merchant types, then you would need to add 30 sets of values for rates and fees in the system since each rate and fee item vary per merchant type. Once this is completed, these default values will appear on the user online app to save them time from filling out blank fields. All the user would have to do is edit existing default values on the rates and fees page of the online application.

Instruction on how this works:

1. You will choose default user and default business type, and then input your info in all the suggested rates and fees columns, and then save these changes

2. After you do this, next choose the first option in business type field, and then scroll to bottom and click on "Apply Default Rates/Fees" to this page. Then choose the next selection in your Business Type field and repeat this step for all business types.

3. You can then go and edit the rates and fees for all business types and save your changes.

4. You have now setup default rates and fees for all business types for the default user account.

What happens is this: The software is going to save and apply all default rates and fees for all business types to ALL users in the system automatically. This will save you a lot of time.

If you want to customize the rates and fees for a specific user, you can then choose the specific user, and customize rates and fees. If you make a change to a certain rates and fee item, the software will highlight that row in blue background color. Every time you view a specific user, you will be able to see which rates and fees are customized (which will be highlighted in blue) and any rate or fee that is same as system default, it will just have a white background. So this feature will help you identify what rates and fees special pricing you gave to specific users.

Edit SIC/MCC Codes

Division of Corporation Finance: Standard Industrial Classification (SIC) Code List

The Standard Industrial Classification Codes that appear in a company's disseminated [EDGAR filings] indicate the company's type of business. These codes are also used in the [Division of Corporation Finance] as a basis for assigning review responsibility for the company's filings. For example, a company whose business was Metal Mining (SIC 1000) would have its filings reviewed by staffers in A/D Office

http://www.sec.gov/info/edgar/siccodes.htm

Merchant Types

This feature allows you to add default merchant types to be used in the user online application system. You will add the merchant types to this feature per bank/processor. You must add merchant types in this feature that are on your PDF merchant application only.

Ship and Install Options

This feature allows you to add, edit and customize your own shipping and installation options. These options are found on the last step of the User Online Application, Shipping/Supplies page. You can add your own options for who will do installation, verify leases, and do customer training.

Additional Service Options

This feature allows you to add additional services that the merchant is requesting. These options include: Pin Based Debit, American Express, Amex Reverse PIP, Amex ESA, Split Dial, Discover, JCB, Diner's / Carte Blanche, Wright Express Account, Voyager Account, EBT - Food Stamps, EBT - Cash Benefit, Fleet One, and Fuelman. These options are on the User Online app, step 2, service request page. You are able to enable or disable any of these options based on what you are offering your merchants.

Application Checklist

This feature allows you to create a checklist of tasks to be done for each new merchant application so you can insure the process to approve accounts are completed without any delays and any details are being overlooked. When you customize your list of tasks, you are able to manage this feature within the status section of the software, and a checklist is available for each new merchant account submitted under the app summary page.

FNBO Boarding Manager

This feature allows all clients to submit and transmit data from each merchant account to the First National Bank of Omaha secure server so you don’t have to key in each app 2 times.

EQUIPMENT AND SOFTWARE INVENTORY

Equipment Sales Tax

You are able to add your State Sales Tax % in this section, and this sales tax will be added to all invoices for all merchant accounts boarded into the system. The sales tax will apply to all new accounts where equipment is sold in the same state your corporate office is located:

You can add state sales tax % on this page:
http://bankcardpros.net/configuration.php

Scroll down to the 5th section called Set-Up and Configure Equipment/Software List

The results of this option can be viewed on ALL invoices for ALL merchant accounts boarded in the system. You can see the sales tax % applied to the invoice on this page as an example:

http://bankcardpros.net/apps_status.php?cmd=edit_app&step=agent_com&app_id=1041

Equipment Trade-In

This feature allows you to keep track of equipment that must be returned to your office from merchants who have agreed to participate in trading in their old equipment for your new equipment. This feature is available and can be used on the User Online App, on the Equip Options page.

Your employees can use this feature to call merchants who have not returned their old equipment yet and make arrangements to have the old equipment shipped back to your office.

To use the equipment trade-in option, go to this page of the user online application page: http://bankcardpros.net/app_manager.php?step=page&p=3&app_id=1041

Next, you will choose the equipment you are providing the merchant, then under Pay Options, choose "Trade-In", then click on the ADD button. When you add, the page will refresh and then you will see a new section called "**TRADE-IN EQUIPMENT THAT MUST BE SHIPPED TO OUR OFFICE"**

You will then add the equipment type, brand, and serial number that must be returned to you by the merchant.

Next, you and your staff can go to this page to manage the equipment trade-in items and status of all items still outstanding: http://bankcardpros.net/tradeins.php

Equipment Inventory

The equipment inventory features is located on this page: http://bankcardpros.net/equipment_manager.php?cmd=list_equipment_inv

The equipment inventory page provides you with the following options and reports:

1. View all equipment items available in the system
2. Manage, edit, and add equipment details like photo, title, description, weight, and more.
3. View how many equipment items are on hand
4. View how many equipment items (serial numbers) are pending and assigned to accounts already
5. View how many equipment items were sold for the current month, year, and all time
6. Add new equipment inventory by adding serial numbers

You can add new inventory and serial numbers on this page http://bankcardpros.net/equipment_manager.php?cmd=inventory&equip_id=16

In order to add inventory, you have to add serial numbers to the equipment items:

1. Choose the equipment item you want to add inventory and then click on the ADD button

2. When you click on the ADD button, you will add serial numbers in this section Add New Inventory Items/Serial #'s

3. If you add 5 serial numbers on this page and save, then the system will show 5 equipment items ON HAND for that equipment item.

4. If you do not have serial numbers at this time, just input any numbers like 001, 002, 003, 004, 005 and later when you are filling out the user online app and assigning equipment to that user app, you can simply change the 001 serial number to the actual serial number of the equipment item.

Note: the system will not allow you to add duplicate serial numbers

You can manage and edit equipment items here: http://bankcardpros.net/equipment_manager.php?cmd=equipinfo&equip_id=16

You can view the equipment item details and photos here:
http://bankcardpros.net/equipment_manager.php?cmd=equipinfo&popup=1&equip_id=16

Before you can start using the equipment inventory feature, you must add and setup equipment in the system as follows (in this order):

Manage, edit, rename, delete equipment CATEGORIES on this page:
http://bankcardpros.net/syslists.php?cmd=list_equiptypes

Manage, edit, rename, delete equipment MANUFACTURERS on this page:
http://bankcardpros.net/syslists.php?cmd=list_manufacturers

Manage, edit, rename, delete equipment VENDORS on this page:
http://bankcardpros.net/syslists.php?cmd=list_vendors_equip

Manage, edit, rename, delete equipment PLATFORMS on this page:
http://bankcardpros.net/syslists.php?cmd=list_equipplatforms

Manage, edit, rename, delete equipment PROGRAMMING OPTIONS AND PROMPTS on this page:
http://bankcardpros.net/syslists.php?cmd=list_programming

Manage, edit, rename, delete equipment COMMUNICATION OPTIONS on this page:
http://bankcardpros.net/syslists.php?cmd=list_communication

Add new equipment items to each equipment category on this page, INCLUDING the manufacturer and supplier for each equipment item:
http://bankcardpros.net/syslists.php?cmd=list_equips&EquipmentType=Terminal

Manage, edit, rename, delete equipment COSTS AND USER COSTS on this page:
http://bankcardpros.net/equipment_manager.php?cmd=list_equipments

Equipment Categories

This feature allows you to add various equipment categories to the system before adding equipment items. Equipment categories may include: terminals, wireless terminals, pin pads, check imagers, printers, software, internet software, etc.

Equipment Items

This feature allows you to Add, edit, or delete equipment items (ex: Verifone 3750, Nurit 2085, Hypercom T7P, etc.) and choose manufacturers for each equipment item. Adding equipment items will not show up on the online application for any user until after you go to the equipment costs page and edit the equipment cost field with a value like 279.00 or even 0.00, and then click on the submit button to save and apply your changes to all users.

Please note: When you add new equipment items, they will not show up on the user online application until AFTER you go to the Equipment Cost page and add a cost for that item.
Go to this page to add equipment items:
http://bankcardpros.net/syslists.php?cmd=list_equips

Then go to this page, look up the equipment item you added, and add a cost for that equipment item:
http://bankcardpros.net/equipment_manager.php?cmd=list_equipments

You can then go to the user online application and view all equipment options and choices to add to the online application, which will show on this page:
http://bankcardpros.net/app_manager.php?step=page&p=3&app_id=1041

Equipment Costs

This feature allows you to Add, edit, or delete equipment costs to each user, including the suggested retail price, lease price, rental price, and the reprogramming fees. These equipment costs will be added to the agent invoice in the "Accounts" section and will show up as a deduction.

Go to this page to add equipment items:
http://bankcardpros.net/syslists.php?cmd=list_equips

Then go to this page, look up the equipment item you added, and add a cost for that equipment item:
http://bankcardpros.net/equipment_manager.php?cmd=list_equipments

You can then go to the user online application and view all equipment options and choices to add to the online application, which will show on this page:
http://bankcardpros.net/app_manager.php?step=page&p=3&app_id=1041

Equipment Suppliers/Manufacturers

This feature allows you to add, edit, or delete equipment suppliers/manufacturers such as Lipman, Verifone, Hypercom, Ingenico, Comstar, RDM, Telecheck, Magtek, Thales, Citizen, PC Charge, AuthorizeNet, etc.

Equipment Platforms

This feature allows you to Add, edit, or delete equipment types such as Vital, ByPass, Omaha, First Data, etc.

To see the results of these options you added or edited, go to this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=equipment&app_id=1041
You can view these options in this section: **Equipment Options**: T7Plus

If you click on the Edit button to the right of this section, you will view this page and be able to edit the options:
http://bankcardpros.net/app_manager.php?cmd=edit_equip_item2&p=&equipment_purchase_id=126

Equipment Prompts/Options

This feature allows you to Add, edit, or delete equipment types such as AVS, Tip, Auto Batch, EBT, etc.

You can go to this page and edit or add equipment prompts and options:
http://bankcardpros.net/syslists.php?cmd=list_programming

To see the results of these options you added or edited, go to this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=equipment&app_id=1041
You can view these options in this section: **Equipment Options**: T7Plus

If you click on the Edit button to the right of this section, you will view this page and be able to edit the options:
http://bankcardpros.net/app_manager.php?cmd=edit_equip_item2&p=&equipment_purchase_id=126

You can edit or add options for the following features:

1. Application ID
2. Application Type
3. Date Installed
4. TID
5. Serial #
6. Purchase Option
7. Lease start date
8. Lease end date
9. Warranty option
10. Warranty start date
11. Warranty end date
12. Download phone
13. Secondary download phone

14. Platform/front-end
15. Communication options
16. Terminal option/prompts

Equipment Communications

This feature allows you to Add, edit, or delete equipment types such as Dial, IP, Wireless, etc.

To see the results of these options you added or edited, go to this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=equipment&app_id=1041
You can view these options in this section: **Equipment Options**: T7Plus

If you click on the Edit button to the right of this section, you will view this page and be able to edit the options:
http://bankcardpros.net/app_manager.php?cmd=edit_equip_item2&p=&equipment_purchase_id=126
You can edit or add options for the following features:

1. Application ID
2. Application Type
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4. TID
5. Serial #
6. Purchase Option
7. Lease start date
8. Lease end date
9. Warranty option
10. Warranty start date
11. Warranty end date
12. Download phone
13. Secondary download phone
14. Platform/front-end
15. Communication options
16. Terminal option/prompts

Equipment Vendors

This feature allows you to add, edit, or delete equipment types such as TASQ, Terminals Direct, Phoenix Group, etc.

This feature is necessary because the address information you provide for the equipment vendor/supplier will be populated on the equipment lease vendor PDF documents on the equipment supplier section.

Equipment Warranty Options

This feature allows you to add, edit, and customize a complete list of equipment warranty options available for each piece of equipment. This feature can be viewed and managed and added when you fill out a user online application, on the Equip Options page, when you add an equipment item, a new equipment details and summary section will be created for that equipment item. In this equipment details and summary section, you can edit all the options for this piece of equipment.

To see the results of these options you added or edited, go to this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=equipment&app_id=1041
You can view these options in this section: **Equipment Options**: T7Plus

If you click on the Edit button to the right of this section, you will view this page and be able to edit the options:
http://bankcardpros.net/app_manager.php?cmd=edit_equip_item2&p=&equipment_purchase_id=126

You can edit or add options for the following features:

1. Application ID

2. Application Type
3. Date Installed
4. TID
5. Serial #
6. Purchase Option
7. Lease start date
8. Lease end date
9. Warranty option
10. Warranty start date
11. Warranty end date
12. Download phone
13. Secondary download phone
14. Platform/front-end
15. Communication options
16. Terminal option/prompts

Pay Options

Pay options can be viewed on this page:
http://bankcardpros.net/syslists.php?cmd=list_payoptions

The pay options that can be enabled or disabled are:

1. Purchase
2. Lease
3. Reprogram
4. Free
5. Rental
6. Swap
7. Equipment trade-in

The results of enabling or disabling these options can be viewed on this page:
http://bankcardpros.net/app_manager.php?step=page&p=3&app_id=1041

In the first section called: **EQUIPMENT SOLD/LEASED**

You will see the Pay Option drop down menu with all the options you can enable or disable.

SETUP AND CONFIGURE USER PROFITS AND COSTS

Lease Vendors

You can manage, edit, add, delete options for this feature on this page:
http://bankcardpros.net/syslists.php?cmd=list_vendors_lease

This feature allows you to Add, edit, or delete lease vendors, lease grades, and leasing month terms available. These items will be added to the agent invoice in the "Accounts" section where profits will be added to the agent invoice.

The results of the lease funding options you add or edit can be viewed on this page of the online user application:
http://bankcardpros.net/app_manager.php?step=page&p=3&app_id=1041

Lease Factors/Splits

You can manage, edit, add, delete options for this feature on this page:
http://bankcardpros.net/user.php?s=p&cmd=edit_cost&uid=

This feature allows you to Add, edit, or delete lease factor values and lease funding splits paid to Sales Reps. These items will be added to the agent invoice in the “Accounts” section where profits will be added to the agent invoice.

The results of the lease funding options you add or edit can be viewed on this page of the online user application:
http://bankcardpros.net/app_manager.php?step=page&p=3&app_id=1041

and can be viewed on the user invoice on this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=agent_com&app_id=1041

Lease Upfront Bonus Commissions

You can manage, edit, add, delete options for this feature on this page:
http://bankcardpros.net/syslists.php?cmd=list_lbonuses

The equipment lease upfront bonus feature allows the system to automatically apply a one-time bonus to each invoice for each account submitted to the system. The upfront lease bonus feature allows you to pay a specified bonus based on a specific processing volume range, apply a total bonus amount, and/or share the total bonus amount with up to 3 additional users within your network (example: sales rep, sales manager, and sales office user).

Upfront Bonuses

You can manage, edit, add, delete options for this feature on this page:
http://bankcardpros.net/bonus_manager.php?s=p&uid=

This feature allows you to Add, edit, or delete upfront bonuses that is separated by new merchant account and existing merchant account. These items will be added to the agent invoice in the “Accounts” section where profits will be added to the agent invoice. You must create a separate list of upfront bonuses (based on new or existing merchants) options for each bank/processor (must match exact items and spelling as shown on the bank/processor PDF doc). The banks/processors are located in the drop down box on the top of the page.

You can edit upfront bonuses on this page:
http://bankcardpros.net/bonus_manager.php?s=p&uid=

You can view the results of adding or editing upfront bonus options on this page:
http://bankcardpros.net/app_manager.php?step=page&p=7&app_id=1041

Volume Bonuses (Monthly Processing Volume Bonus)

You can manage, edit, add, delete options for this feature on this page:
http://bankcardpros.net/syslists.php?cmd=list_vbonuses

Volume bonuses are configured and added to each user application on this page
http://bankcardpros.net/app_manager.php?app_id=1618

in this section
Existing Merchant Average Monthly Processing Volume (Enter up to 12 months processing volume)

and this section
Processing Volume Bonus Commission Summary

Based on the user input on the online user app page for volume bonuses, the system will automatically calculate the results of the volume bonus and apply this to the user invoice for this merchant account on this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=agent_com&app_id=1545

Performance Bonuses

You can manage, edit, add, delete options for this feature on this page:

http://bankcardpros.net/perfbonuses.php

You can add and edit 2 different types of performance bonuses for users to benefit from. They are:

1. Equipment Lease Funding Performance Bonus
2. New Merchant Activation Performance Bonus

You can add a performance bonus name, then choose the time period which would be monthly, bi-monthly, and/or weekly. Then you can choose the frequency of when the performance bonus will be applied to each user invoice in the # Accounts field. Example: If you want the performance bonus to apply to the invoice every 10 accounts sold, then add 10 to the # Accounts and the bonus will be added on the 10th account and every 10 accounts after that.

The results of the performance bonuses you edit or add can be viewed on this page:
http://bankcardpros.net/apps_status.php?cmd=edit_app&step=agent_com&app_id=1041

Starter Supplies

You can manage, edit, add, delete options for this feature on this page
http://bankcardpros.net/ssup_manager.php?s=p&uid=

This feature allows you to add, edit, or delete starter supplies such as imprinter tickets, imprinters, cables, tickets, etc. These items will be added to the agent invoice in the “Accounts” section where costs will be deducted from the agent invoice. You can get a complete list of supplies and costs from your equipment provider.

The results of starter supplies options you edit or add can be viewed on this page
http://bankcardpros.net/app_manager.php?step=page&p=4&app_id=1041

Shipping Options

You can manage, edit, add, delete options for this feature on this page
http://bankcardpros.net/shipcost_manager.php?s=p&uid=

This feature allows you to Add, edit, or delete shipping options and shipping costs. These items will be added to the agent invoice in the “Accounts” section where shipping costs will be deducted from the agent invoice.

The results of shipping options you edit or add can be viewed on this page
http://bankcardpros.net/app_manager.php?step=page&p=4&app_id=1041

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CONGRATULATIONS!

YOU ARE FINISHED CONFIGURING THE SOFTWARE.
YOU CAN START SETTING UP NEW USER ACCOUNTS AND IMPORT YOUR EXISTING MERCHANT ACCOUNTS INTO THE SYSTEM.

+++

How the Residual Reporting System Works

We recently changed the software code to calculate residuals.

Example, if 1 specific merchant profited a total of $100 for the month, this is how the residuals will calculate, depending on how you set up users in your system and what level they are in the network:

TOTAL NET PROFIT FROM MERCHANT = $100

1. System Administrator - starts with 100% of the $100 profit
2. Sales Office / 70% - (linked directly to user above within network)
3. Sales rep / 50% - (linked directly to user above within network)
4. Referral Partner / 10% - (linked directly to user above within network)

The example above is how the software was designed to calculate in the past. What this means is the sales office would get 70% of the $100 which means sales office earns $70. The sales rep (sublevel user 3, linked to sales office user above) would then get 50% of the total profit the user above them gets, meaning they would only get 50% of the sales office $70 profit, totaling $35 for the sales rep. The sales rep should really be getting 50% of the total profit of $100, totaling $50 profit for the sales rep. So this would mean the sales rep is really not earning a true 50% profit and is getting paid $35 instead of $50. And the system has been calculating like this which is wrong.

So we now redesigned the calculations to work this way:

TOTAL NET PROFIT FROM MERCHANT = $100

1. System Administrator - starts with 100% of the $100 profit
2. Sales Office / 20% - (linked directly to user above within network)
3. Sales rep / 50% - (linked directly to user above within network)
4. Referral Partner / 10% - (linked directly to user above within network)

The way the system now works, is ALL users, regardless of where they are positioned in their network, they would ALL be getting a total % from the total net profit from the merchant which is $100.

So this is what each user is now earning based on the new calculation scheme:

TOTAL NET PROFIT FROM MERCHANT = $100

1. System Administrator - Gets the remaining after all sub-users in the network get their share below, which is $20 TOTAL remaining profit to systemadmin user.
2. Sales Office / 20% = $20 profit
3. Sales rep / 50% = $50 profit
4. Referral Partner / 10% = $10 profit

What you will need to do is go back to all the 10-12 users you have setup in the system and change/adjust their residual % and the system should recalculate properly.

Before residual reporting system can work, all user accounts in the software must have a designated residual % assigned to them for the following 3 options:

Direct Residual %
InDirect Residual %
Equipment Commissions %

You can view these options at the bottom of this sample user account:
http://bankcardpros.net/user.php?cmd=edit_user&uid=47

You can view sample residual reports on this page:
http://bankcardpros.net/profit.php

Instructions: The Net Profit total is the total residual profits paid to the corporate office from the banks/processors/vendors.

The User Profit total is the total residuals paid to all users in the system from the Net Profit.

(1) The total number of reports (one report per each processor) involved for the month

(2) The total number of merchants

(3) The total number of all Direct Net Profit accounts for the month. This page shows the total Net Profit for each report (and is not split between users

(4) The User Profit shows all user's total profit excluding the System Admin totals. Net Profit for the month is equal to System Admin Profit + All Users Profit for the month

When you click on any reporting month, it will take you to the next residual reporting page here:

http://bankcardpros.net/res_report.php?cmd=rep_by_agent&Year=2010&Month=4

Instructions: For each month, the residual reporting system will calculate residual reports for all users as follows:

(1) The residual calculation system takes NetProfit for each merchant and splits it between all users who are linked and share in the sales of each merchant account.

(2) The system splits residual profits between direct users, network users, referral partners, or additional user specified within the Status section. Next, the system calculates the total, and deducts it from the 100% and assigns remaining residual % to the System Admin user account. For each residual % for each merchant account, the system shares residual profits between some users, where the System Admin user always receives the remaining % as Network Profit.

Volume Calculations: The totals for volume calculations above show total calculations for all Direct Merchant Accounts only.

When you click on any sales rep name, it will take you to this page:

http://bankcardpros.net/res_report.php?cmd=rep_by_vend&Year=2010&Month=4&AgentUID=19

This page will also allow you to click on this link: All (Click here to view all Customers for all Vendors) and be able to view and export all merchant accounts, for all vendors for a specific user and specific reporting month.

When you click on any bank/processor/vendor name, it will take you to this page:
http://bankcardpros.net/res_report.php?cmd=rep_by_merchants&AgentUID=19&Year=2010&Month=4&res_id=60

How to import residual reports each month:

The following instructions must be followed to successfully import your monthly residual report:

1. Make sure your excel document is ready for importing. Each excel document must include the following minimum columns in order for the system to import, sort, and calculate residual % for each user properly:

  a. MID #
  b. Total Net Profit

Most companies will want to import more data as follows:

  a. DBA name

b. MID #
c. Total Net Profit
d. Volume
e. # Transactions
f. Average Ticket
g. ....and more, you can setup and import as many columns as you want

3. Open your excel document, and highlight all columns and rows (including column titles) for all accounts in your excel document.

4. Copy all the highlighted rows and columns (or select the CTRL + C key at the same time) in your excel document.

5. Now go to the Profits Page within the CRM website here: http://bankcardpros.net/profit.php

6. Click on the Import Reports Link on the left menu and go here http://bankcardpros.net/res_import.php

7. Choose the Vendor name in the drop down menu that you want to import a residual reports for

8. Choose the residual reporting month and reporting year, and you will automatically see an empty and blank field box on this page as an example
http://bankcardpros.net/res_import.php?reptype_id=5&Year=2010&Month=08

9. In the empty/blank field box, paste (or select the CTRL + V key at the same time) the copied data in the blank field, and click on the NEXT button

10. This page will show you all the database column fields available in your residual reporting page based on how you setup the page. You will map these database column fields with the proper columns that are in your Excel document.

11. Click on the preview button to preview all accounts that will be imported. IF ANY MID #'s appear in red letters, this means the account does not exist in your software, the MID # is missing, and/or the MID# is spelled wrong in the account. You must copy all these red accounts to a MS Word doc and go back into your software and fix these discrepancies.

12. When all red accounts are cleared up, you can go ahead and click on the IMPORT button, and it will alert you as to how many accounts were successfully imported into the system.

13. When you successfully import your report, you can view the report results here

http://bankcardpros.net/profit.php
and here
http://bankcardpros.net/res_report.php?cmd=rep_by_agent&Year=2010&Month=4

How to setup user account profiles

System Administrative users can view how many users are in the system, as well as stats like sub-users, leads, # of apps, and pending apps on this page
http://bankcardpros.net/user.php?cmd=list_users

System Administrative users can view detailed information about all users in the system including their start date, App ID#, User name, direct residual %, indirect residual %, equipment %, sub-users, leads, apps, and pending apps on this page
http://bankcardpros.net/user.php?type=all

All users can view their complete user account profile with detailed information on this page:
http://bankcardpros.net/user.php?cmd=edit_user&uid=MYACCOUNT

System admin users can create new accounts on this page
http://bankcardpros.net/user.php?cmd=add_user

When setting up a new user account, you must specify what kind of user category they will belong to, such as regional sales office, sales office, sales manager, sales rep, referral partner, or telemarketer user.

Next, each user must be assigned and linked to a sponsor/recruiter. For example, a sales rep user will always be linked to a sales manager or sales office user. By default, all users are set to link directly to the system admin user. If you do not have sales managers or sales office users, just setup all users in the system as sales rep users and link them directly to the system admin user account.

When you link a sales rep user to a sales office user in the system, you have created a network of users. Because the sales office user is linked to the system admin user by default, this network now consists of 3 levels of users in the system. What this means is all 3 user will always share in the residual % profit from each merchant account sold by the sales rep user.

However, if the sales office user sales a merchant account, the account is boarded under the sales office user account and only the sales office and system admin users will share in the profits from that account. Residual profit % sharing always applies to users going up in the network chain of command, starting with the user who sold the account.

User Account Information Statistics

Subusers
Leads
Leads Sold
Apps
Approved
Inactive
Declined
Commissions
Lease Commissions
Residuals

User Account Setup Information

Account status
Start date
Upload photo
User type
Sponsor/recruiter
System ID
User #
Office #

Office code
Full name
Title
Email address

Username and Password Login Credentials

Username
Password
Send password reset email

For security purposes, the password must be 8 characters long, must contain letters, numbers, and capital letters

User Contact Information

Business name
Physical address
Suite
City
State
Zip
Country
Federal Tax ID #
Birth Date
Office Phone
Office Extension
Office Fax
Cell Phone
Corporate website
Career opportunity website
Blog website
Equipment sales website

User Instant Messenger Accounts

View the User IM Accounts, Including: Yahoo IM, Skype IM, AOL IM, Windows Live IM, MSN IM, Trillian IM, Google (gtalk) IM, ICQ IM, MySpace IM, Jabber IM

User Social Network and Blog Website Links

View the User Social Networking Accounts, Including: LinkedIn URL, Facebook URL, Twitter URL, Blogger URL, YouTube URL, MySpace URL, WordPress URL, Wikipedia URL, Tagged URL, LiveJournal URL, 360.Yahoo URL, Other Blog URL

User System ID and User Links for External Applications and Forms

These links are the links that you put on your corporate or sales websites so you can generate leads and inquiries from visitors from your websites.

All leads will be saved and stored in the system, but under the proper user account based on the agent id that is included in the URL link (example: ...?agent_id=32)

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

Customer App
http://bankcardpros.net/merchant.php?agent_id=1

Recruit Form

http://bankcardpros.net/apply/

Fax Options

Please visit http://www.faxcompare.com so you can review all e-fax service vendors, compare prices, and choose a vendor best for you.

Fax Service Vendor
Account User Email

User/Network Logo Upload Management

User Logo:

Use system admin logo
Use logo for my account only
Use logo for my account and my network

Upload site graphic/logo

(Logo must be 849 pixels width by 113 pixels length, and must be .gif or .jpeg format.)

Bank/Processors Allowed to Access/View

This feature allows you to choose which bank/processor user online apps you want the user to have access to when submitting new user apps. If you highlight one or more bank/processor app names and save your settings, they will be available to that user to use.

When you highlight the bank/processor online app names the user will have access to, they will be available to select in the Processor/Bank name drop down box on this page:
http://bankcardpros.net/app_manager.php?app_id=1620

Paymentech Office Information

This feature is available and visible only when the Chase Paymentech processor/bank options is enabled on this page:
http://bankcardpros.net/syslists.php?cmd=list_processors

IP Addresses Used to Login Using Current User Name / IP Restriction Settings

This is an additional security feature that allows administrative users to restrict which computer/ip addresses can access the system using the username for that user. This will prevent users from sharing their username and password to multiple people at multiple locations from accessing the software using the same username. This feature allows system administrators from allowing unauthorized use and access to the software.

Instructions: Leave field box below empty to allow user name to login from any IP Address.
Multiple IP addresses are allowed.

Residuals Profit Information - View User Residual Reports

Instructions for Non-Admin Users:

Direct Residual % is the monthly residuals you will be paid for accounts you sold (example: you would be paid 50-60% residuals you sold). Indirect Residual % is the monthly residual share you will be paid on accounts sold by users under you in your network (example: if you are a sales office user or a sales manager user, these types of users get a residual revenue share for all users they manage on their team that sell accounts, like 5-10% residual share %).

Instructions for System Administrative Users:

Explanation on how the system administrator user profit % option works: The system admin user (corporate office user account) will always be paid the remaining residual % after paying a % to the sales rep, sales manager, or sales office user who all share in the residual % profit from a merchant account. After sharing residual % profits with all users, the remaining residual % goes to the system admin user account (corporate office user account).

> If you enter 100% in the Indirect Residual %, then the system admin will get the remaining residual %.
>
> If you enter 0%, then the remaining residual % profit would go to the next level user under the system admin user account, like a Regional Office, etc.