

## **Top 30 Bankcard Pros CRM Features**

The most popular questions business owners ask is, “What does Bankcard Pros CRM do?” and “How can it help my sales organization?” We have put together a list of 30 most popular features your business can benefit from utilizing Bankcard Pros CRM.

### **The 30 most popular features in Bankcard Pros CRM are:**

1. Utilizing the recruiting section to receive new applicant forms and resumes for hiring sales agents and sub-agents
2. Import and view merchant daily transaction reports and daily batch settlement reports, transaction statistics, and automatic generated merchant statement invoices
3. Build and customize online forms, questionnaires, and surveys
4. Manage and track statistics for referral partner leads
5. Utilize the comprehensive leads and telemarketing system for call centers with inside sales reps and telemarketers. Access sample cold calling and telemarketing sales pitches to use when speaking to prospects
6. Send letter templates to prospects and active clients via email or fax
7. Manage online training curriculum program for new sales agents, as well as manage and track progress, steps completed, and scores
8. Board new merchant accounts into the system so you can track underwriting status, view merchant contact information, and manage existing clients activity, history, paperwork, and more.
9. Generate merchant application documents with fields already populated on PDF docs that you can view, download, print, save to your desktop, or email to your merchants
10. Your employees and outside sales reps will receive daily status reports for all merchant accounts boarded into the system
11. Utilize 6 different rate quote calculators which include Merchant Cash Advance Comparison Calculator, Comprehensive 3-Statement Cost Comparison & Rate Quote Proposal, Interchange Rate Quote Proposal, IC Plus. 2-Tier, 3-Tier, and 4-Tier Cost Comparison Quote, Merchant Online Application with Special Rates and Fees Quote, and the Gift Card Return-On-Investment (ROI) Calculator
12. Order and track the status of business card orders for employees and sales reps
13. Send out birthday wishes to your vendors, leads, sub-agents, and your existing merchant accounts

14. Access, view, and download forms, training materials, and marketing materials using the document download center
15. Utilize and manage all your contacts with the address book
16. Keep track of all equipment and software inventory, costs, pricing, and inventory on-hand
17. Send out news articles and announcements to vendors, sub-agents, merchants
18. Schedule training conference call events for you and your sub-agents
19. Search the general knowledgebase for answers and training on various topics
20. Submit trouble tickets for receiving support for you, your sub-agents, or your existing merchant accounts
21. Export mailing lists so you can mail out letters or post cards to leads or existing merchants
22. Create email marketing campaigns and send out marketing emails to your leads or existing merchants
23. Keep track of your sales statistics with daily, weekly, monthly, and yearly reports
24. View daily sales and motivational quotes
25. Keep track of hourly employees, sub-agents, or telemarketers by utilizing the time and attendance time clock features
26. Schedule appointments between you and your vendors, sub-agents, employees, or business partners
27. Schedule tasks and reminders between you and your vendors, sub-agents, employees, or business partners
28. Schedule training events between you and your vendors, sub-agents, employees, or business partners
29. Schedule seasonal holidays and vacations for your vendors, sub-agents, employees, or business partners
30. View your monthly residual report details and profit from each merchant account as well as track over 10 different bonus and commission options available on the User Invoice for each new merchant account boarded