BANKCARD PROS.COM

ACCOUNT TRACKING SOFTWARE

Leads and Telemarketing User Guide

Leads and Telemarketing Section

The leads and telemarketing section allows you to provide leads to your outside Sales Reps, inside sales reps, call centers, outsourced lead generation companies, and telemarketers so they can work leads for your office.

Using the leads and telemarketing system, you are able to track the progress of each user working leads, as well as monitor and supervise what they are doing on a daily basis.

1. The leads system has the following quick link menu options on the left column of the site:

Leads Options

1. Lead statistics
2. Lead list names
3. Edit lead statuses
4. Edit letter templates

Leads Manager

1. Add new lead
2. Import lead list
3. Telemarketer
4. Lead search

Lead Categories

1. Available leads
2. new leads
3. New referrals
4. Working leads
5. Leads contacted
6. Qualified/hot leads
7. Sold/pending leads
8. Dead leads

Reminders/Appointments

1. Reminders/tasks
2. Appointments

There are several system administrative tools available that will allow you to manage and customize the leads section, as follows:

2. There are 4 features in the setup/configuration page only available to system administrators, and you will be able to manage the following 3 features:

a. Leads/Telemarketing Section - 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. Leads/Telemarketing Section - Add Lead List Names (Enable/Disable Feature)

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.

b. Leads/Telemarketing Section - Add Lead List Names (Enable/Disable Feature)

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.

c. Leads/Telemarketing Section - Lead Statuses

This feature allows you to add, edit, or delete lead status levels within each of the 6 status categories. The 6 status categories are NEW LEADS, WORKING LEADS, LEADS CONTACTED, QUALIFIED/HOT LEADS, SOLD/PENDING, OR DEAD LEADS. 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.

d. Email Notifications for Leads

This feature is for system administrator use only. In the setup/configuration page, under Email Notifications, there are 2 email notifications for the leads system: Lead Appt Reminder, and Lead Task Reminder. When any user adds a new lead appointment or a new lead task/reminder, the system will automatically send an email notification to that user (not to the DBA name of the lead) informing the user they have a new appointment or task/reminder.

3. Within the leads system, you will also be able to manage and customize the leads system using the following links:

Lead List Names

If this feature is enabled in the setup and configuration page by the system administrator, users can create their own lead list names. This allows leads to be organized by their source, where the lead was generated, like incoming call, postcard mailer, referral partner, purchased by lead provider, etc. This allows you to track results and success of leads by their source, or lead list names.

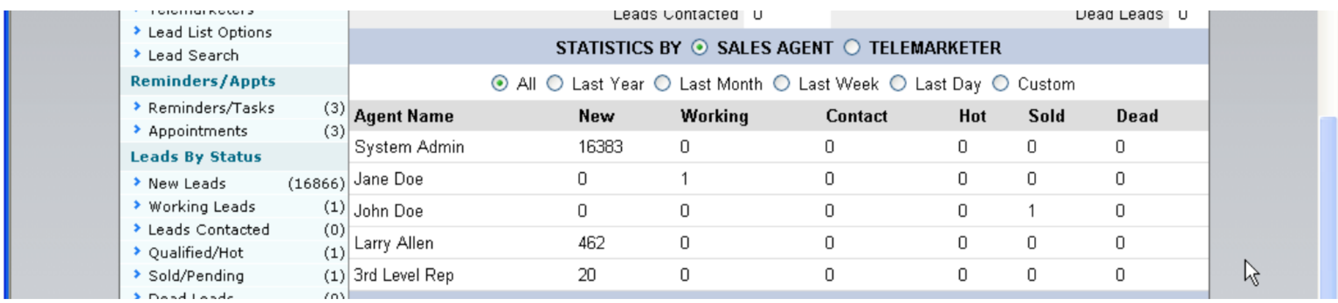
Edit Lead Statues

This feature is for system administrator use only. This feature allows you to add, edit, or delete lead status levels within each of the 6 status categories. The 6 status categories are NEW LEADS, WORKING LEADS, LEADS CONTACTED, QUALIFIED/HOT LEADS, SOLD/PENDING, OR DEAD LEADS. 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.
Edit Letter Templates

The leads and telemarketing system now allows users to create their own letter templates, as many as they need, and add their own logos and content to each letter template, and save them for future use. When the telemarketer or sales rep is working leads, they can now click on the SEND NEW LETTER button on the LEAD STATUS DETAILS page, and edit the letter template if they want to, and send the letter via email to the lead they are working with.

4. Lead Statistics Page

On the main leads page called Lead statistics, you can view total lead activity for all users or all telemarketers in the system by: All, today, yesterday, current week, current month, current year, or custom search by date range. (See screenshot below)



Agent Name	New	Working	Contact	Hot	Sold	Dead
System Admin	16383	0	0	0	0	0
Jane Doe	0	1	0	0	0	0
John Doe	0	0	0	0	1	0
Larry Allen	462	0	0	0	0	0
3rd Level Rep	20	0	0	0	0	0

5. Lead Status Configuration

This section allows you to add, edit, or delete lead statuses from all 6 lead categories in the Leads and Telemarketing Section.

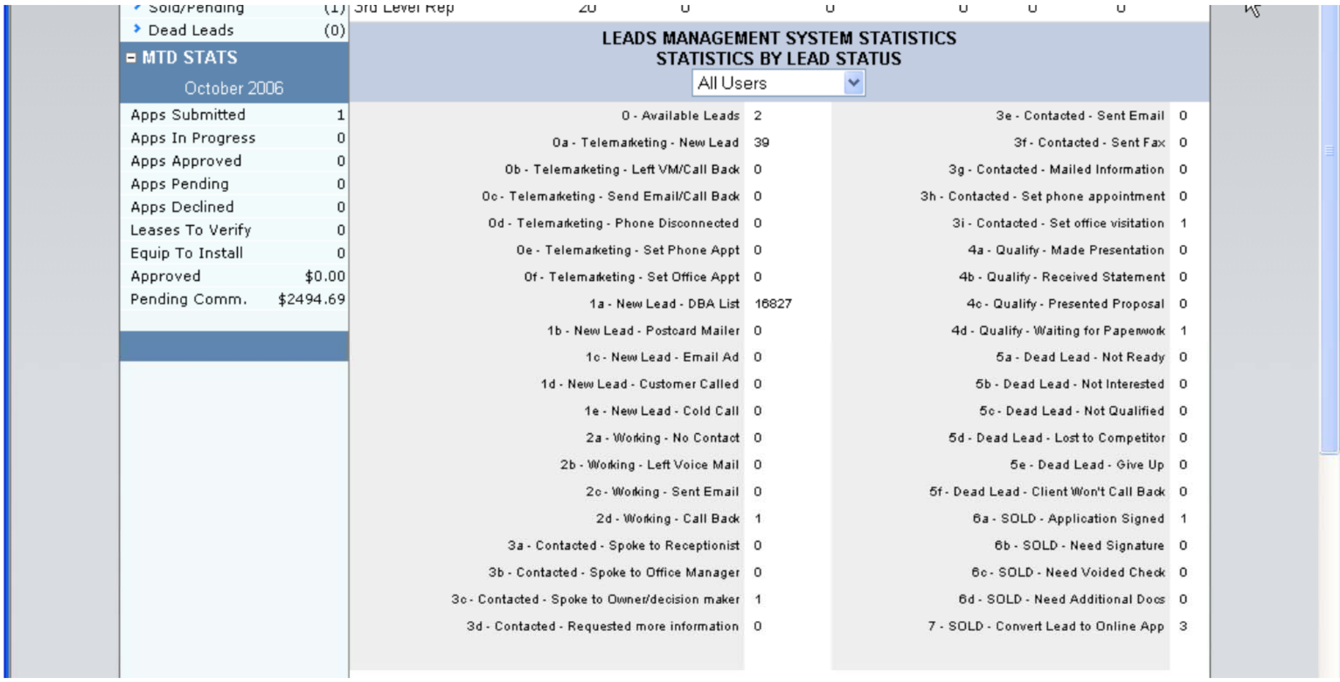
The software comes with a set of lead statuses already setup in the software under each lead category. You can edit this list if you wish to provide your own set of lead statuses under eacg category.

6. Lead status categories:

The lead status categories are hard-coded into the system and can never be changed or customized. When working and contacting leads in the system, all users can change the status of a lead, based on the result of the contact, to one of the following lead categories:

1. New leads
2. New referrals

3. Working leads
4. Leads contacted
5. Qualified/hot leads
6. Sold/pending leads
7. Dead leads



7. Lead status levels

Please note: All system administrators are able to edit and create their own list of lead status levels under each of the 6 lead categories. To do this, click on the Home menu button, then click on Setup/Configuration page, then click on the Lead statuses page, and you can start editing the lead status levels for each lead category.

You are not able to edit or change the Lead Categories as this is hard coded in the software and is used to run the lead system. However, you can add, edit, or delete lead statuses in each lead category.

The software is installed with the following default lead status levels under each lead category (you can edit these lead status items under each category at any time):

New Leads - Lead Category (Sample Lead Status Levels Below)

0 - Available Leads
0a - Telemarketing - New Lead
0b - Telemarketing - Left VM/Call Back
0c - Telemarketing - Send Email/Call Back
0d - Telemarketing - Phone Disconnected
0e - Telemarketing - Set Phone Appt
0f - Telemarketing - Set Office Appt

Working leads - Lead Category (Sample Lead Status Levels Below)

1a - New Lead - DBA List
1b - New Lead - Postcard Mailer
1c - New Lead - Email Ad
1d - New Lead - Customer Called
1e - New Lead - Cold Call

Leads Contacted - Lead Category (Sample Lead Status Levels Below)

2a - Working - No Contact
2b - Working - Left Voice Mail
2c - Working - Sent Email
2d - Working - Call Back

Working Leads - Lead Category (Sample Lead Status Levels Below)

3a - Contacted - Spoke to Receptionist
3b - Contacted - Spoke to Office Manager
3c - Contacted - Spoke to Owner/decision maker
3d - Contacted - Requested more information
3e - Contacted - Sent Email
3f - Contacted - Sent Fax
3g - Contacted - Mailed Information
3h - Contacted - Set phone appointment
3i - Contacted - Set office visitation

Qualifed/Hot Leads - Lead Category (Sample Lead Status Levels Below)

4a - Qualify - Made Presentation
4b - Qualify - Received Statement
4c - Qualify - Presented Proposal
4d - Qualify - Waiting for Paperwork

Dead Leads - Lead Category (Sample Lead Status Levels Below)

5a - Dead Lead - Not Ready
5b - Dead Lead - Not Interested
5c - Dead Lead - Not Qualified
5d - Dead Lead - Lost to Competitor
5e - Dead Lead - Give Up
5f - Dead Lead - Client Won't Call Back

Sold Leads - Lead Category (Sample Lead Status Levels Below)

6a - SOLD - Application Signed
6b - SOLD - Need Signature
6c - SOLD - Need Voided Check
6d - SOLD - Need Additional Docs

7 - SOLD - Convert Lead to Online App

When viewing the lead status details of any lead, you are able to customize the page by showing or hiding the following sections:

a. Rate quotes prepared
b. Merchant information
c. Existing merchant rates and fees
d. Additional Data Imported With Lead Lists
e. Equipment Choice and Cost Summary

To customize these sections by enabling or disabling the ability to view these sections, you can go to the User Access Rights section.

8. How to manually add 1 lead in the system at a time:

Step 1: Before you add leads to the system, all leads need to be assigned to a lead list name. To add lead list names, click on “Lead List Options”, then add as many lead list names as you want. This is so you can better organize, search, find, and use all your leads you enter into the leads system.

Step 1: When you are in the leads section, click on “Add New Lead”. Fill out the form with all the information you have regarding the new lead. You will also need to fill in the correct info for the following top fields:

1. Lead list name	Always put your leads in a lead list
2. DBA Status	Assign the lead a lead status
3. Lead owner	Choose who you want to manage the lead
4. Telemarketer owner	Choose a telemarketer if they are calling for you

When adding a lead to the system, the following fields are available for you to use:

2. Business name
3. # of locations
4. Business address
5. City
6. State
7. Zip
8. Contact name
9. Owner name
10. Email address
11. Website address
12. Office #
13. Toll Free #
14. Cell phone #
15. Fax #
16. How Did Merchant Find Us?
17. Merchant Status
18. Merchant Type

19. Products Sold
20. Existing Processor Name
21. Average Ticket?
22. Monthly Volume?
23. Is Merchant Happy?
24. If No, Explain
25. What are Their Needs
26. Current Discount Rate
27. Transaction Fee
28. Statement Fee
29. Monthly Minimum
30. Annual Fees
31. Other Fees

When adding a new lead, you are also able to add new tasks and reminders. When working leads, you can do one of the following actions for each lead:

1. Change the status of a lead
2. Change the ownership of the lead to a new owner
3. Add a new note to the lead so you can record what was said on phone
4. Add a new appointment for the lead
5. Add a new task/reminder for the lead
6. Convert the lead and all data to a new online agent app
7. Delete the lead

9. Importing a lead list using a text file or MS Excel document

To import a list of hundreds or 1000's of leads into the system at one time, take the following steps:

Step 1: Before you add leads to the system, all leads need to be assigned to a lead list name. To add lead list names, click on "Lead List Options", then add as many lead list names as you want. This is so you can better organize, search, find, and use all your leads you enter into the leads system.

Step 2: Click on Import Lead List. Choose the Lead List name in the drop down menu where you want to save all your leads.

Step 3: Open the document that contains all your leads. Select all rows and columns of your leads in your document, then choose copy.

Step 4: Go to the website to the Import Leads Page, and inside the open field box, paste the data into the field box.

Step 5: Choose the Lead List Owner you want to assign these leads to. The field box is set to ALL USERS. This means all leads you import will be available to all users who can search, select, and assign any or all of these leads to their account, meaning no other users will be able to see these leads any longer. Then click on the button "Import List".

If you want to assign leads to several users, then assign the lead list to system administrator. When the leads are imported, then search for all leads assigned to system administrator by a certain region (city, state, zip code, area code) where your sales reps are located, then choose all leads, and assign them to that user. Repeat this step for all other users.

If you don't select owner, then leads status is set to "AVAILABLE". So any user will be able to search and find the leads list under the "Get Available Leads" section. If you choose an owner user for the leads list you are importing, then the leads list status is set to NEW under that user owner. These leads will not be available or seen by any other user in the system.

Step 6: After you Import List, map all fields, and click on submit. You have just successfully imported all your leads into the system.
Fields available in the lead system for importing:

1. DBA Business name
2. # locations
3. First name
4. Last name
5. Complete name
6. Address
7. City
8. State
9. Zip
10. Phone area code
11. Phone number
12. Complete phone
13. FAX area code
14. FAX number
15. Complete FAX

10. How to Use the Leads System

When viewing the lead status details of any lead, you are able to customize the page by showing or hiding the following sections:

a. Rate quotes prepared
b. Merchant information
c. Existing merchant rates and fees
d. Additional Data Imported With Lead Lists
e. Equipment Choice and Cost Summary

To customize these sections by enabling or disabling the ability to view these sections, you can go to the User Access Rights section.

If you are logged into the software as the system administrator, you will be able to view all leads that exist in the lead section as well as all users working leads.

When a non-admin user is logged into the software, they are only able to view all leads for their user account only, as well as any sub-users/leads assigned to them in their network.

11. Customizing the Lead Categories

Lead categories are permanent categories in the system that cannot be changed. They are as follows:

New Leads	New Referrals	Working Leads
Leads Contacted	Qualified/Hot	Sold/Pending
Dead Leads		

12. Customizing the Lead Status Levels

Before using the leads system, each client can customize the list of lead status levels under each lead status category. To do this, the system administrator has to login and go to the Setup/Configuration section:

http://yourdomainname.com/configuration.php

In the "Set-Up Basic System Options and Admin Information" section, click on this option: "Edit Lead Statuses" where you can add, edit, or delete lead statuses for each lead category.

When you are on this page, you will see a drop down menu of all lead categories. Choose one of the categories you want to edit. When you are on lead category, you can edit or delete existing lead status levels, or you can add a new status level of your choice. This page will also show you the # of existing leads that exist in the lead system for each status level.

The 3 lead statuses: Telemarketing - new lead, New lead – DBA list, and New lead – customer called cannot be edited or deleted as these are used by the system.

13. Explanation of available lead option links and features:

Main leads section – This is the home page of the leads section. Here you can view all the statistics and summary of all leads in the system as well as the status and progress of users working leads in the system. You can view the summary of all leads by lead category and view all users working leads on a daily basis.

You are able to search for leads worked by a specific user for last year, last month, last day, or custom search field by searching by date ranges. With this feature, you will be able to view each users progress on a daily, weekly, monthly, or yearly basis.

Add new lead – use this link to manually add 1 lead at a time into the system.

Before you can add a lead into the system, you must go to the Lead List Options page, and create a new lead list name. All leads in the system must be assigned to a list name in order to help you organize your leads based on category or source of the lead. This will help when you are searching for a particular list of leads. An example of lead list names could be: California Doctors, or Long Beach, CA Dentists, or Florists in Dallas, TX.

Available leads – This is where all leads are stored when imported into the system. All users are able to view these leads, search for leads based on zip code, city, state, or area code, view search results, and assign those leads to their user account so no other user will have access to them.

Import lead list – This link allows you to import 100's or 1,000's of leads into the software using a lead list in Excel or Text format.

Before you can add a lead into the system, you must go to the Lead List Options page, and create a new lead list name. All leads in the system must be assigned to a list name in order to help you organize your leads based on category or source of the lead. This will help when you are searching for a particular list of leads. An example of lead list names could be: California Doctors, or Long Beach, CA Dentists, or Florists in Dallas, TX.

When importing leads using a list, the following fields are available for you to map to the fields on your lead list document:

DBA Business Name	# Locations	First name
Last Name	Complete name	Address
City	State	Zip Code
Phone area code	Phone number	Complete phone
Fax area code	Fax number	Complete fax
Email address		

Telemarketers – This link will show you a list of all telemarketer users who are working leads and setting up appointments for sales reps they are assigned to.

Lead list options – This link allows you to setup lead list names in the system. Lead list names must exist before you can manually add a lead or import a lead list into the software.

Lead search – Users can search for leads in the system using the following search options:

From date	To date	Status sections
Status categories	Lead owner	Telemarketers
Owner name	Business name	City
State	Zip code	Phone

Reminders/Tasks – This link will allow you to view all reminders and tasks each user sets up in the system for each lead. This section will show the reminder/task by DBA name, current status, and # days this task is due.

Appointments - This link will allow you to view all appointments each user sets up in the system for each lead. This section will show the appointments by DBA name, current status, and # days this task is due.

Lead Categories

New Leads – leads that are new to the system and just imported or manually entered into the lead system

New Referrals – new referrals that are new to the system and just imported or manually entered into the lead system

Working Leads – Leads that are being contacted for the first time by the sales rep or telemarketer.

Leads Contacted – Leads where the sales rep or telemarketer has contacted someone at the company and is providing information about a service or product, making presentation, and is attempting to identify a need to sell a service

Qualified/Hot Leads – Leads where the sales rep or telemarketer has received interest by the company to buy a product or service, wants more information, and/or has set-up an appointment for a sales rep to call or visit the company.

Sold/Pending Leads – Leads where the sales rep or telemarketer has sold a merchant account or equipment, and is in the paperwork and payment process.

Dead Leads – Leads where the company is not interested, has no need, or is already processing and has equipment being used.

14. How to add a lead and change the status of the lead:

You will notice all lead options and features are on the left column of the web page in the QUICK LINKS menu section.

Click on the "Add New Lead" link. You will see a series of drop down menu options as follows:

Lead List Name – You can assign the individual lead you are adding to the system to a lead list name. This helps you organize multiple leads by assigning them to a list name of your choice.

DBA Status – All leads must be assigned a status level. Choose a status level for your lead.

Lead Owner – Your user account will be selected by default. Any sub-users in the software assigned to you will also appear so you can add a lead and assign it to one of your sub-users.

Telemarketer Owner – If you have a telemarketer working leads for you, you can assign the lead to that user to start calling for you.

Contact information for each lead – You are able to input data for each lead in the following fields:

Business name	# locations	Business address
City	State	Zip code
Contact name	Owner name	Email address
Website address	Office #	Toll free #
Cell phone #	Fax #	

Type of lead and notes

How did merchant find us?	Merchant status
Merchant type	Products sold

Existing merchant data

Existing Processor Name	Average Ticket?
Monthly Volume?	Is Merchant Happy?
If No, Explain	What are Their Needs?
Current Discount Rate	Transaction Fee
Statement Fee	Monthly Minimum
Annual Fees	Other Fees
How Did Merchant Find Us?	Equipment List
Notes About Merchant/Contact Person	

Reminders/Appointments – Here you can setup a reminder or appointment for the lead on the same page that you add a new lead. This is optional if you have already setup an appointment or reminder as you are adding this new lead into the system.

Now you are ready to submit this new lead and all information into the system. If all your data and options are correct, click on the "Submit" button.

15. Working new leads added to the leads system

When working and contacting all your leads, it is important to prioritize your day of who you will contact first. Your priority is to sell as many merchant accounts per day, and also receive signed paperwork for each sold account. Remember, a sold account really should not be treated as sold until you receive signed paperwork from the customer.

On a daily basis, you will want to start contacting your leads based on the category they are listed in and their status level. You will contact leads on a daily basis in the following order:

Appointments – Before you start your day and calling new or existing leads, check this section to make sure you don't have any appointments scheduled for today. If you do, make a note of that and be on time for the appointment.

Tasks/Reminders - Before you start your day and calling new or existing leads, check this section to make sure you don't have any tasks/reminders scheduled for today. If you do, make a note of that and be on time to follow through on completing the task or reminder.

Qualified/Hot Leads – These leads are hot/qualified leads that should be contacted on a daily basis. You have already spoken to the owner and established that the customer has a need to buy your products and services. Your chances of closing this lead is high and should be given priority over all other leads.

Leads Contacted – These leads you are still working and trying to determine if they have a need and want to do business with you. These leads should be contacted last when you are finished with all your hot leads, appointments, or reminders.

Working Leads – These leads you are still working and trying to speak with the owner or decision maker in the company. These leads should be contacted last when you are finished with all your hot leads, leads contacted, appointments, or reminders.

New Referrals – These are new referrals input into the software by a business. These should be treated as hot leads because the owner has visited your website and filled out your new referral form on your website and is searching for more information or interested in buying from you. Call these immediately.

New Leads – These are leads added to the software by you or the system administrator. Start working on these leads AFTER you have reviewed and completed all other leads in all other lead categories.

Sold/Pending – Any lead in this section has already been converted to a user app in the system and the merchant has final paperwork and contracts in their possession. You are just waiting to receive original signatures.

16. Contacting and Changing the Status of Leads

When you login to the software, go to the main leads home page. On the home page, you will see a summary of all leads in each lead category on the home page for your user account.

On the left column under QUICK LINKS menu section, you will see all your leads sorted by the following Leads categories: New leads, new referrals, working leads, leads contacted, qualified/hot leads, sold/pending leads, or dead leads.

17. Ready to start calling leads?

On the main leads section page, click on the New Leads category. You will see a list of ALL new leads in the system.

These leads are sorted by newest lead on top. When you click on the newest lead, change the status, and add a note.   NEXT, you will have 2 options: Click on the gray button that says "Save Changes", or "Save and Got To Next Lead". If you "save and go to next lead", the system will move the saved lead to the bottom of the lead category list, and will take you to newest available lead in the same lead list category.

You will repeat this process until you have called all leads within that lead category section.

You will change the status of all new leads to a status level under the Working Leads category. When you are finished contacting all New Leads, you would then go to the Working Leads category and start calling all leads in that category.

When you click on a lead, you will be taken to the LEAD STATUS summary page showing all the DBA contact information and details/results of each contact.

18. On the LEAD STATUS page, you are able to do the following:

1. Call the lead

2. Depending on the result of the call, you will change the DBA status in the drop down menu to the appropriate status level, if it has changed.
3. In the notes field, add any notes or comments of your choice to help you remember what happened after each contact
4. Send the lead DBA name a letter template
5. If you need to prepare a rate quote, click on the link “Prepare New Rate Quote” link and the system will take you to the rate quote preparation page.
6. Add a reminder or appointment, including details, due date, and time.
7. Click submit
8. You will receive a pop up alert stating “Info has been updated successfully! Click OK to continue”

19. If you need to edit the DBA information, click on the link options below the LEAD STATUS title called “Edit DBA Information”

On this page, you are able to do the following:

1. Assign this lead to a new lead list name.
2. Change the DBA status
3. Assign this lead to a new owner
4. Assign this lead to a telemarketer user
5. Edit all contact information
6. Add a new reminder or appointment for this lead
7. Click submit
8. You will receive a pop up alert stating “Info has been updated successfully! Click OK to continue”

20. If the business owner is ready to open a merchant account and/or buy equipment, you will click on the link options below the LEAD STATUS title called “Convert to App”

A pop up alert will appear stating “Are you sure you want to convert this Lead to App?” Click OK to continue.

The system will take you to the User Online Application page so you can start filling out the online merchant account application.

21. Filling Out the Online Application

Step 1 – Get Started

User Name – Your user name will be the default user already selected.

Bank/Processor – The default bank/processor will be selected. If you are using a different bank/processor choose the appropriate one in the drop down menu.

Use Required Fields – The online app has several fields that are required by the bank/processor in order to get the merchant account approved. If the data is missing, the application will be placed on hold. If you do not think you have all the necessary information to finish this app, choose NO and fill out the app, then click “Submit App in Preparation” so the app will not be saved in the system as an “Application in Progress” but will be saved as an “App on Hold”

Fill out the following information:

1. DBA contact information
2. User information
3. Office information
4. Submit

Step 2 – Service Request

Merchant Status – Choose new or existing merchant. Based on what you choose, upfront bonus amounts will appear that will automatically be added to the invoice and paid to you when the application is approved.

Bankcard Types – choose one of the 3 options

Additional services – Choose Yes, No, New, Existing, or N/A for all the choices in this section, including account #’s if they are existing.

Step 3 – Merchant Info

Fill out all data on this page and submit

Step 4 – Merchant Profile

Fill out all data on this page and submit

Step 5 – Owner/Officers

Fill out all data on this page and submit

Step 6 – References/Banks

Fill out all data on this page and submit

Step 7 – Rates and Fees

Fill out all data on this page and submit

Step 8 – Equipment Options

Fill out all data on this page and submit

Step 9 – Starter Supplies

Fill out all data on this page and choose “Submit Application” or “Submit App in Preparation”

You are now completed with this application.

22. What Happens Next?

Email Notifications

The merchant and the user that submitted this application will receive a copy of the following email notifications:

1. New Merchant Application Received: {$BusinessName}
2. Merchant Account Application Documentation

The email notifications will include a copy of the merchant application and agreement already filled out by the system. The merchant needs to open the file, print, sign, and fax the signed paperwork back to the sales rep.

Sales Representative

It is now the responsibility of the sales rep to contact the merchant, get them to sign all paperwork, and fax it back into your office.

The sales rep will review all signed paperwork and make sure everything is complete. The sales rep will then fax the paperwork to the underwriting department at the corporate office according to their instructions and policies.

23. Corporate Office

The underwriting administrative user will receive notification of the new application submitted by the sales rep.

The underwriter will check their fax records to insure they received all signed paperwork and review that everything is accurate and complete in order to get the account approved.

The underwriter will fax all paperwork to the bank/processor for approval.

The underwriter will login to the software, go to the STATUS section, click on USER APPS, click on the app they are working on, then click on the CHANGE APP STATUS link, and then change the status of the application to one of the 16 different status levels.

All applications received for the first time will be saved in the software under the status level of RECEIVED.

For all new apps, the first status level changes will be from RECEIVED to one of the following:

SIGNED CONTRACTS

REVIEW

PENDING

CREDIT/UNDERWRITING

DECLINED

APPROVED

24. Email Notifications

When the status of the account has been changed, the merchant and the sales rep will receive the following email notifications:

1. Status Change for Merchant Application: {$BusinessName}
2. Application for Merchant Account Approved: {$BusinessName}

25. Viewing the Details of Each Account

Users and administrators will be able to view the following details of each application in the STATUS section:

1. Merchant Application #440
2. Edit This App
3. App Summary
4. Change App Status
5. DBA Records
6. Equipment
7. Rates
8. Itemized Invoice
9. Other Bonuses/Deductions
10. Residuals
11. Notes
12. Docs
13. Trouble Tickets

26. Profits from Each Merchant Account in the System

Each user can view their total upfront commissions, lease funding, and monthly residual reports in the PROFITS section of the software.

When an account is still in progress, the status of the upfront commission or lease funding for the account will be in the pending status level.

When the status for the merchant account has been changed to PAYROLL APPROVAL, the pay for the account will change from PENDING to APPROVED.