Welcome to Bankcard Pros CRM Account Tracking Software

Complete List of CRM Features
http://bankcardpros.com/html/complete_feature_list.html

Top 30 CRM Features
http://bankcardpros.com/html/top_30_crm_software_features.html

Over 64 YouTube Training Videos
http://www.youtube.com/user/rhendrix76#g/u

Bankcard Pros CRM is now synced with Many Email and Calendar programs
http://bankcardpros.com/html/sync_with_emails___calendars.html

Build your own Internet Based Training Curriculum with Videos
http://bankcardpros.com/html/internet_based_training.html

Complete Support Options
http://bankcardpros.com/html/support_options.html

Complete training and support videos and documentation
http://bankcardpros.com/html/training_videos___manuals.html

We're proud of our Bankcard Pros CRM Account Tracking Software

> "People with goals succeed because they know where they are going. It's as simple as that." - Earl Nightingale.

Creative Vision Studio's goal is to provide superior CRM software, consulting, and marketing services for the electronic payment processing industry, including Independent Sales Organizations (ISO), Merchant Services Providers (MSP), Merchant Level Sales (MLS), and Independent Sales Agents (ISA).

We are undeniably proud of our Bankcard Pros CRM, designed with the most current web-based technology to make your business more efficient, enhance productivity, increase corporate appeal and, importantly, reduce running costs.

Today's CRM market is tough one. As developers of a CRM product, we know a myriad of different products are available, with each claiming to provide the functionality needed to run your business in a more effective manner.

Bankcard Pros CRM is the result of a decade-long period of investment by a dedicated team of software developers who know your industry, your needs and requirements. We created a CRM product that specifically targets the Bankcard industry, while providing the flexibility to customize according to the particular needs of your company.

So what can Bankcard Pros CRM do for you?

Bankcard Pros CRM is designed the streamline your business. Our product is designed with your sales staff in mind, ensuring easy-to-use functionality that manages everything from daily sales progress and commissions, equipment lease funding and monthly residual reports, to selling, tracking and deploying merchant accounts.

Bankcard Pros CRM allows the user easy access to information, displayed in a logical and well thought out design. One-click button functionality and drop down menus make it simple to move between screens, making sure your staff can both collect, provide and inform customers in the most time-effective manner. After all, good business practices today demand that your customers have instant access to information.

Likewise, we know that CRM users need to know well and feel comfortable with a product they employ on a daily basis. Creative Vision Studio has designed informative, easy-to-follow and comprehensive online training support that covers each and every aspect of Bankcard Pros CRM. Our online support empowers your staff to use a pro-active approach and ensure they can improve their ongoing knowledge of the CRM without the need for and time-consuming telephone support.

Our goal is to build superior CRM software – we think we've done that. However, we also know that keeping our software at the top of the market demands ongoing, methodical improvements. We continue to invest heavily in the software's design and functionality to make certain Bankcard Pros CRM remains as relevant for business tomorrow as it is today.

Take a closer look at Bankcard Pros CRM

As we mentioned, our CRM provides a wide range of functionality, so your entire sales team and marketing staff have information available at their fingertips.

From information gathering to extensive reporting capabilities, from a truly usable knowledgebase to user-friendly systems covering a wide range of functionality, our CRM allows your staff to be independent while working within your company's internal regulations. We designed the following system features to give users access to information is a readily available and efficient manner

Bankcard Pros CRM's web-based features include:

> merchant account boarding and status reports - email notifications - daily sales statistics - address book - birthday lists - export mailing lists - leads and telemarketing system - different rate quote calculators - calendar – events, appointments, tasks, reminders, training, and holidays scheduling - online form builder - recruitment - messaging – periodical statistics - submit internal apps - online merchant applications - submit referral leads - search apps - employee attendance time clock - residual reporting - user invoice - upfront bonuses - upfront residuals - performance bonus - equipment sales and leasing - volume bonuses - setup fees bonuses - lease upfront bonus - equipment inventory and costs tracking - user account management - referral partner management - internet-based training curriculum - business card order tracking - trouble tickets – knowledgebase - document download library - news and announcements

And remember… all features are well supported by online training.

We had you in mind when we built Bankcard Pros CRM

Bankcard Pros CRM is designed to support Independent Sales Organizations and Sales Professionals. We believe our CRM software suite will play an integral role in every sales office's marketing strategy, by improving the ability to deliver information and services in a timely and effectively way.

Bankcard Pros CRM Account Tracking Software was developed exclusively for the electronic payment processing industry from small-to-large sales offices. Our product organizes business operations and communications between management, employees and independent sales agents, no matter where they are located.

Bankcard Pros CRM provides a one-stop web-based solution for sales offices that organizes and manages all aspects of your company, allowing sales agents to work efficiently in any location – an Internet connection ensures up-to-date information sharing in real time.

What you should know about us…

Creative Vision Studio, LLC. began the design and development of Bankcard Pros CRM Account Tracking Software in 2003 and to date has served over 1,500 clients nationwide.

Our mission is to make small businesses look great. We do this by providing small businesses with web development and graphic design services that inspire and enable businesses to connect emotionally with their customers.

Creative Vision Studio, LLC. was founded in 1997 in Austin, Texas as a professional web development and creative services company providing sales, marketing, advertising, web, and technology consulting services to small, medium, and large businesses nationwide within the electronic payment processing industry.

Creative Vision Studio is an experienced, well established web design company specializing in website design, creative design, and e-commerce development. We have planned, created and launched hundreds of successful websites since our inception for many businesses globally.

In 2003, Creative Vision Studio entered into software programming and development. The company developed Bankcard Pros CRM Account Tracking Software, an exciting and high-demand, web-based software solution customized specifically for small-to-large sales offices within the electronic payment processing industry.

What we believe… and how that benefits our customers.

Success or failure as a human being is not a matter of luck or circumstances. The power to achieve a dream is in our hands - and the first step is to identify specific goals that will move a dream from the realm of imagination into the world of reality. After all, it's much easier to get what you want out of life when you know where you really want.

It is with this vision that our CRM has been developed. Our goals, strategies, and values are focused on generating smarter CRM software solutions that will provide greater returns for our clients, while providing world-class customer service and technical support.

Our core values are value, education, service, professionalism and training, and we believe that to create a great product we need to invest continually in our team.

The following guiding principles encapsulate the values that inform our business decisions:

- Provide a great work environment and treat our leadership, employees, vendors, sales partners, and investors with respect and dignity
- Embrace diversity as an essential component in the way we do business
- Apply the highest standards of excellence to the delivery of value-added products and services we provide our clients
- Develop enthusiastically satisfied customers all of the time
- Recognize that profitability is essential to our future success
- Wisely allocate resources to maintain efficiency and effectiveness in attaining our mission and goals.
- Contribute positively to our communities and our environment

It is through our ongoing and conviction to these core values that we believe our staff continue to improve our products. We know our customers reap the benefits of our product, created by a professional and dedicated team that is supported by strong management and which works in and open and innovative environment.

Customer Testimonials

“Thanks for the 64+ new YouTube Training videos you produced and made available online. This is going to be a big boost to your business and support and training. This will definitely take a lot of the time and requirements off your shoulders. The new training videos will take you and your business to the next level. Congratulations and Thank you!”

- Mike Eisenman

“Robert, the CRM Software has been working really well for our sales office. We look forward to pumping it up this next year in 2011 and utilizing your new features. Curious to see what you will have for videos.”

- Eric Eichelen

“Working with Robert over the past few years has been a great experience. I have sent many referrals his way and he takes great care of them. His CRM system is amazing and offers many robust features to help small to medium sized agents and ISO's. He is passionate in the solutions he provides and supports. I recommend Robert and his CRM system to anyone needing this type of software.”

- Christian Murray, Global E-Telecom

“The Merchant Cooperative is nothing short of ecstatic with the level of service The BankcardProsCRM Account Tracking Software has provided to our company. Our ROI from this software is infinite as it consistently increases the efficiency of our overall operations, from sales leads to c-service, thereby making each day more profitable than the last. We have been through many providers only to find shortfalls in their product and shortcomings in their service. In a marketplace filled with less than competent software; Robert Hendrix has introduced a solution steeped in integrity and laden with profit building organizational tools. We have recommended, and will continue to recommend, The BankcardProsCRM Account Tracking Software to our business partners and affiliates alike.”

- Jarret Smotrila, Vice President/COO, Merchant Cooperative, Goose Creek, SC.

“Regarding Bankcard Pros CRM: I actually love this software and everything it allows me to do. One of the best things about this software is the fact that it is already configured to this business. I looked at Salesforce and ACT and SugarCRM and some others and although they are all great products, there were some specific things in the Bankcard Pros CRM software that are very valuable and hard to do without. If anyone is still considering this software, call or email Robert and he will be happy to give you a demo. By the way, when changes come out in the Bankcard arena or when new tools exist in the marketplace to make selling and maintaining customers easier, Robert actually creates new features and automatically updates them within your software which is a BIG PLUS for me. Also the marketing materials, webpage design and collateral, etc. (too much to list). For those that know me and have spoken with me and done business with me, you know that this is a genuine recommendation and extremely blunt in my opinions. When I didn’t like it to begin with I said so, and I now am giving an honest and sincere opinion based on my continuing experience with Robert and his software. I hope this serves as help to someone.

- Marcus Andrews, Valtegrity Business Solutions

“I just saw my new website and am very pleased with it. I appreciate you getting my site ready so quickly. Your company will come highly recommended from me. Thank you and have a good weekend!

- Keith Symanski, CEO, Bankcard Alliance PS.

“Hi Robert, we had our first training on our new Bankcard Pros CRM software today with all of our sales reps, and your CRM software was very widely received. In fact some of our old sales reps who haven't done much with us lately stated, "maybe we need to re-look at things and come back" Thanks!

- Sam, VP of Sales Development

“I have been using Bank Card Pros CRM Account Tracking Software and eCommerce website for over 4 years now and I am very happy with the products and services they provide our sales office. What I really have found value in is the numerous upgrades that have been added to the software over the years, their team really understands the needs of a merchant service sales office and is always adding new and helpful stuff to the software. I also had them design a new logo for my company which came out great, first class stuff. It’s also been very easy to add a few custom features to my CRM that helped me work better with my processors agent portal and the team at Bank Card Pros seems to have good relationships with all the major processors and ISO’s so the integration of apps and documents was easy. I can comfortably recommend Bank Card Pros to anyone looking to grow their business and offer the latest in agent reporting and lead management to their reps, and oh yeah, let me tell you, the price is very reasonable, I spent thousands on another product and a lot of time and still didn’t have what I wanted until I found Bank Card Pros, I wish I had found them first.

- Tom Powers, TMS Payments, (866) 500-4576

“The Merchant Cooperative is nothing short of ecstatic with the level of service The BankcardProsCRM Account Tracking Software has provided to our company. Our ROI from this software is infinite as it consistently increases the efficiency of our overall operations, from sales leads to c-service, thereby making each day more profitable than the last. We have been through many providers only to find shortfalls in their product and shortcomings in their service. In a marketplace filled with less than competent software; Robert Hendrix has introduced a solution steeped in integrity and laden with profit building organizational tools. We have recommended, and will continue to recommend, The Bankcard Pros CRM Account Tracking Software to our business partners and affiliates alike.”

- Jarret Smotrila, Vice President/COO, Merchant Cooperative, Goose Creek, SC.

“Thank you so much for taking the time to help me get started…you seem like a great guy actually trying to help and not just be in it for the almighty dollar. That is refreshing! Thanks again Robert!”

- John Gibbs, United Bank Card Sales Rep

“Your new websites look outstanding and we especially appreciate the “about the owner” section that outlines your personal qualifications, background, core values, interests and volunteer work. We are also a family-owned, Christian principle based business, and we provide many churches and nonprofit organizations with FREE equipment donations, as well as very discounted services and rates. We look forward to working with you and your team in the future. God Bless you and your family.”

- Bill Shepherd, CEO, American Alliance Processing

“I was checking out our Bankcard Pros CRM software and was just blown away by all the new features and upgrades you did! You are a very talented individual to say the least. Keep up the good work!”

- Jamil Adair, President, Merchants First Choice

“We use Bankcard Pros and we’re happy with it. My thoughts on the product are it's a good product and it is very economical for what it provides. Once we figured out the system and implemented it, Robert has been quick to respond to us. I just send him an e-mail with a link to a screen that says "how do I do this from here" or "I'd like this to do this" and he usually has it fixed by the next day (in some cases, it's fixed within minutes). We handle all of our commissions through the program (we use to do them manually in Excel), including all of our up-front commissions, as well as trouble tickets, agent communication, etc. When we hit a glitch every now and then, they have been resolved pretty quickly. As a user of the system, it's a solid product once you get it up and running.

- Jay Holsomback, Secure Payment Solutions, Inc.

“All that you have done for me so far is awesome. I don’t know how anyone can say they don’t see value in the Bank Card Pros CRM Software because I have been having fun with it for the past couple of days.”

– Marcus Andrews, Owner, Valtegrity Merchant Services

“I use Bankcard Pros CRM software and love it...I have to admit I'm not a techie, and there were some areas that was new to me. However, with Robert's help, we were able to complete the set-up and configuration and everything is running smoothly at this point. It's the best tool I've seen geared specifically towards the bankcard industry. It is not only impressive to those on the outside looking in (potential recruits), but an excellent tool for my sales reps. We have over 600 bits of information available to our account executives, that make our job’s easier. If they need information on a particular subject, such as marketing materials, applications, or just want to review one to the 120 some training audio and video lessons, it's right there at a click of a button. I would highly recommend this product. Be prepared to take some time in setting it up, depending on how much information you want to provide, BUT THE TIME SPENT SETTING IT UP AND LEARNING THE SYSTEM IS WELL WORTH IT!”

- Sam Spiezio, Senior Vice president, US Netcom

“Our switch from Lighthouse Software to Bankcard Pros CRM is based completely service based. Dealing with Lighthouse Software was a constant battle to correct their mistakes with our reporting and database for many years. You would not believe the (documented) nightmares I’ve been through and the obstacles he’s created to overcome those nightmares. There were many instances when I had to show him corrections in his work and I don’t think his ego took kindly to it. He would argue and cause a tremendous stir for a few weeks but then eventually make the corrections. We have lost many, many sales reps along the way as well as having our integrity questioned by many in the industry – because many felt we were purposely altering our residuals and merchant hierarchies to benefit ourselves: completely false. I am pleased to no end to begin a new relationship with a company (Bankcard Pros CRM) who has a fully functional product.”

– Jarrett, EVOyes

“I have known Robert for approximately 10 years and in that time he has ALWAYS demonstrated a tremendous grasp of his Profession. He has a great Work Ethic and Personable demeanor and is a Perfomance-based Professional that will work diligently to get your project completed. I Highly recommend his IT skills.”

- Neil Singleton, Managing Partner at RAMSFIRE GLOBAL LLC.

“I came to know Robert as a referral from another collegue in the ISO industry. My Background as Loan Officer I knew that the had to be a Bank Card Software out there to make life easier. I was very impressed with Robert and his knowledge of the Industry. He has taking me and our company by the hand and continues to offer his proffesional yet gentle advice to take any ISO to the next level of IT Knowledge and Industry superiority over the competitors. I highly recommend him and any invested time or money with Robert and his company will gain a great return. I look forward to working with him and his team."

- Jesse Roldan, Pennsylvania Payment Partners, LLC.

"Bankcard Pros provides you with everything you need to run a sales office from day one including CRM software, marketing and advertising materials, sales collateral, and a complete web presence,"

- Allen Kopelman, Nationwide Payment Systems, CEO, Florida

"As a developer of custom CRM and popular business development software tools, I consider myself extremely thorough and careful when choosing a software solution to manage my base of over 400 Independent Sales Agents. I have found Bankcard Pros Software to be among the most advanced, out of the box, easy to use, comprehensive communication and data management tool in this industry and rely on it daily to support the growth our Independent Sales Organization. This software acts as a center point between my in-house staff, field agents, our merchants, prospects, and processors all in one interface that has proven in my organization to have a 100% up-time,"

- Michael A. Brooks, CEO, California

"Bankcard Pros has been providing our company their solution for the last two years, we use this system for entering all of our merchant applications which ties into our core software platform and loads the front end system and then to FDR's system, we export the gathered data from each merchant agreement and export to our core software, this allows us to pull credit reports and file builds for specific front end authorization networks. This product has allowed Newtek to continue to customize this to our system changed that are unique to our company. We currently support 40 independent agents as well as an inside sales team., we use the system to enter approximately 250 new merchant applications per month."

- David Petry, VP National Sales, Newtek Merchant Solutions

"I have retained Robert's services for 14 months now. His leadership, experience, and creative mind has enabled me to take my business to the next level. From the first day, he came to our offices and analyzed everything we were doing, how we do business, and our relationships with our vendors. He helped us establish new vendor relationships, get more accounts approved, and become more profitable in all areas of our business. He redesigned our paperwork and applications, created new marketing and advertising materials, invented our hiring, testing, and training program, and provided us with all our web design and creative services. Robert is truly a talented and experienced individual within the electronic payment processing industry, and has become a valuable and loyal asset to our company."

- Anthony Manzilla, Axis Merchant Solutions, LLC.

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.

Here is a list of 30 popular features in Bankcard Pros CRM are:

Utilizing the recruiting section to receive new applicant forms and resumes for hiring sales agents and sub-agents

Import and view merchant daily transaction reports and daily batch settlement reports, transaction statistics, and automatic generated merchant statement invoices

Build and customize online forms, questionnaires, and surveys

Manage and track statistics for referral partner leads

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

Send letter templates to prospects and active clients via email or fax

Manage online training curriculum program for new sales agents, as well as manage and track progress, steps completed, and scores

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.

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

Your employees and outside sales reps will receive daily status reports for all merchant accounts boarded into the system

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

Order and track the status of business card orders for employees and sales reps

Send out birthday wishes to your vendors, leads, sub-agents, and your existing merchant accounts

Access, view, and download forms, training materials, and marketing materials using the document download center

Utilize and manage all your contacts with the address book

Keep track of all equipment and software inventory, costs, pricing, and inventory on-hand

Send out news articles and announcements to vendors, sub-agents, merchants

Schedule training conference call events for you and your sub-agents

Search the general knowledgebase for answers and training on various topics

Submit trouble tickets for receiving support for you, your sub-agents, or your existing merchant accounts

Export mailing lists so you can mail out letters or post cards to leads or existing merchants

Create email marketing campaigns and send out marketing emails to your leads or existing merchants

Keep track of your sales statistics with daily, weekly, monthly, and yearly reports

View daily sales and motivational quotes

Keep track of hourly employees, sub-agents, or telemarketers by utilizing the time and attendance time clock features

Schedule appointments between you and your vendors, sub-agents, employees, or business partners

Schedule tasks and reminders between you and your vendors, sub-agents, employees, or business partners

Schedule training events between you and your vendors, sub-agents, employees, or business partners

Schedule seasonal holidays and vacations for your vendors, sub-agents, employees, or business partners

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

All New Version 5.0 - 2011 Features

- View/manage all business card orders with automatic submission to www.printrunner.com
- Merchant daily and monthly transaction activity reports
- Daily batch settlement reporting
- View over 100+ merchant daily transaction statistics

- Generate automatic monthly billing statements for merchant transaction activity
- Keep track of all billable service calls and billable trouble tickets
- Keep track of all billable supplies orders
- Email & Calendar Sync http://bankcardpros.com/html/sync_with_ ... ndars.html
- Equipment Inventory and Tracking - Click here for more information about our new special features
- Vonage One-Click Call + Skype One-Click-Call + X-Lite VoIP
- ISO/MLS Recruiting & Tracking with Online Employment Application / Registration Form + Resume Upload
- Manage Your Entire Referral Partner Network, Track Leads, View Monthly Referral Reports
- Build a Complete Training Curriculum, Online Courses, Testing, Scoring, Track Steps Completed
- Chat Forum and Instant Messenger Components Integrated into Bankcard Pros CRM
- Manage and Track the Status of Business Card Orders for Employees / Sales Agents
- Build Your Online Forms, Surveys, Questionnaires and Track Results

End-of-Day CRM Activity Reports

- QUICK STATS: End-of-Day CRM Activity Reports
- Total New Apps Submitted:
- Total New Leads Submitted:
- Total New Leads Converted to Apps:
- Total New Trouble Tickets Opened:
- Total New Trouble Tickets Closed:
- Total New Appointments:
- Total New Tasks:
- Total Billing for Support Incidents $:
- Total Billing for New Supply Orders $:

Security Features

- SSL Certificate protects data
- High Bit Security PCI audit compliant
- Password verification
- Ability to change status of users to active, inactive, disabled, incomplete
- Password expiration every 45 days
- User access lockout after 3 unsuccessful login attempts
- IP address logging
- Restrict access to system by single IP address per user
- Disable entire system from all user access for system maintenance purposes

ADMINISTRATIVE TOOLS

- Same-day installation for all new clients
- Manage and customize the entire system using the administrative control panel
- Private-label the entire system with your company name and logo
- Web-based software allows employees or sales reps access 24/7 nationwide

- Software can be installed and hosted on your choice of server, or on our secure hosting facility
- Private-label and co-brand the software system using your logo and company contact info
- Edit and customize the color scheme of the entire software system and all pages
- Edit your own HTML title tags for each HTML page section for search engines
- Ability to create and edit unlimited user accounts
- Create and customize your own user account categories/types
- Create and customize your own account status levels
- Customize user access rights and permissions for all users

ALL NEW! Merchant Activity - View Daily Transaction Reports

- View monthly and daily transaction activity reports for all merchants
- Import tool to parse and import all data
- View date/time of all transactions
- Terminal
- Transaction codes
- Primary account numbers
- Transaction ENT Type
- Transaction Number
- Transaction Amount
- Transaction Authorization Code
- Transaction Draft Capture
- Transaction Comments

ALL NEW! EQUIPMENT INVENTORY & TRACKING

- Keep track of all equipment, software, ATM machines, and POS Systems sold
- Setup and manage equipment categories
- Add Equipment Items
- Equipment Vendors/suppliers
- Equipment Manufacturers
- Equipment Costs
- User equipment costs
- Suggested Retail pricing
- Suggested Lease pricing
- Equipment New or Refurbished?
- Equipment Short Title
- Equipment Description
- Equipment Thermal or Friction
- Equipment Upload Photo
- Equipment PCI PED Approved/Compliant?
- Equipment Smart Card ready?
- Add new equipment inventory items including serial numbers and SKU #’s
- View and track equipment On-Hand
- View and track equipment Pending (Sold)
- View and track equipment sold MTD
- View and track equipment sold YTD

- View and track equipment sold All-Time
- Setup and manage equipment inventory alerts that will notify you when equipment inventory is low

LIVE CHAT SUPPORT 3RD PARTY SOFTWARE (Not Included in Software, Can Be Added Per Customer Request)

- We can integrate Live Chat Software to your CRM software so you can provide instant live support to all your sales partners
- ProvideSupport.com - $15.00 per month
- PHPLiveSupport.com - $49.95 for unlimited departments and unlimited operators, you own the PHP Code
- Solutions.LivePerson.com - FLASH DEMO

RATE QUOTE CALCULATORS

- 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
- Gift Card Return-On-Investment (ROI) Calculator

USER / PROFILE MANAGEMENT

- Setup unlimited user accounts
- User #, Office #, System ID#
- Upload User Photo
- User Faxing setup capabilities
- Send password reset features via email
- Setup and view direct and indirect user residual % profit sharing values
- Upload and view all documentation, contracts, and paperwork for each user.
- Keep notes with dates and times of all activity, calls, emails, disciplinary action, and training provided for each user
- Keep track of all trouble tickets created for each user account
- Create personal links for referral forms, online merchant application forms, and career opportunity inquiry forms to add to users personal websites
- User/Network Logo Upload Management
- User Banking Information (Optional Data)
- Setup and configure Residuals Profit Information including direct residual %, indirect residual %, and equipment sales commission %
- Bank/Processors the User is Allowed to Access/View
- IP Addresses Used to Login Using Current User Name / IP Restriction Settings
- 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

- 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

PRICING AND COSTS CONFIGURATION TOOLS FOR COMMISSIONS, BONUSES, LEASE FUNDING

- Existing Merchant Average Monthly Processing Volume
- Processing Volume Bonus Commission Summary
- Setup Fees Sharing (Multi-Network User)
- Upfront Bonus Sharing (Multi-Network User)
- Equipment Lease Funding - Multiple User Commission Sharing (Multi-Network User)
- Equipment Lease Funding Upfront Bonus - Multiple User Bonus Sharing (Multi-Network User)
- Other Users Sharing Profits/Deductions for this Account (Multi-Network User)
- Multiple User Invoice $ Addition/Deduction Split
- Equipment lease funding calculations (Multi-Network User)
- Equipment sales commissions calculations
- Up to 36-months upfront residual payment calculations
- Upfront merchant activation bonuses
- Volume bonus commissions
- Weekly, Bi-Monthly, Monthly, 3-Month, 6-Month performance bonuses
- Equipment purchase, lease, reprogram, free offer, swap, trade-in, and rental options
- Upfront fees collected calculations
- Start-up supplies deductions
- Shipping costs deductions
- Sales tax calculations

ONLINE APPLICATION SYSTEM

- Fully customized online application system gives you complete control to customize
- Customize and setup unlimited online merchant applications for unlimited banks/processors and/or vendors
- Customize and sort all fields to match same fields and same order as your Merchant Application PDF documents
- New Online Electronic/Digital "E-Signature by Mouse" Feature
- Convert existing apps from one bank/processor to another
- Each application tracks user name, bank/processor name, User #, Office #, SIC Code, and more
- Online application allows you to view all users involved in the sales process for the account, including Lead tracking #, source of the lead, referral partner source, telemarketer working on the lead, who created the lead, application ID #
- Online application will provide you with all users who will share in residual profit of the account including sales office, sales manager, sales rep, referral partner, and telemarketer user
- View residual % paid to user who sold the account as well as the ability to override and edit the default residual %
- Add a 2nd user to share in residual % profits on the account
- Apply upfront bonuses for new or existing merchant account

- Keep track of all new or existing accounts the merchant is enrolling in such as Discover, Amex, JCB, EBT, Fleet, etc.
- Input existing merchant average monthly processing volume by entering up to 12 months processing volume, view the total average volume results
- Ability to apply volume bonus commissions to each user selling existing merchant accounts
- Share volume bonus commissions with up to 3 users within the sales rep's network
- Complete equipment management section allows you to add equipment/software sold on the online app and provide complete programming and prompts for equipment, including warranty info, serial number, terminal ID#, lease start and end dates, platform, front ends, communication options, prompts, and more.
- Keep track of fees collected from customers
- Keep track of equipment costs, user costs, and retail sales prices for merchants
- Keep track of lease prices and lease funding totals

LEADS AND TELEMARKETING SYSTEM

- Comprehensive leads & telemarketing system
- Create lead appointments, tasks, send letter templates, prepare rate quotes, upload statements, and keep track of all notes and activity for each lead
- Create and customize unlimited letter templates for leads system
- Letter templates are linked to your document download section so you can attach documents before sending out letter template emails
- Set user access rights for new letter templates and share with all users or keep private
- Create and customize lead status levels
- Create and customize lead list names
- Upload/import unlimited amount of leads and assign to any user
- Manually add leads and assign to any user
- Convert all data from business leads to live online merchant applications
- Rate quote and cost analysis proposal + Interchange rate quote calculator
- Receive driving to and from directions for all lead appointments
- Disable user ability to delete leads or create lead list names
- Choose which lead status categories/levels you want Telemarketers to access/view
- Choose which users you want each telemarketer to setup appointments
- Setup fixed commissions for telemarketers per appointment
- Setup and choose status level of the commissions will be approved for payroll
- MapQuest.com link will instantly provide you Driving Directions to the Business Location
- Instant links will provide you the ability to search the DBA Business name with Google, BBB, D&B, and Yellow Page searches
- Call link ICON for all phone # fields automatically dials and calls the phone number using your Yahoo, MSN, Skype, AOL instant messaging and calling software on your computer
- Instant links will provide you the ability to search the Phone number fields with Google and phonenumber.com reverse phone search utilities
- Fax link ICON for all Fax # fields automatically dials and calls the Fax number to fax a cover letter and attached documents
- Instant WHOIS link will provide you the ability to do a WHOIS search for the website address with NetworkSolutions.com

MERCHANT BOARDING AND STATUS CAPABILITIES

- Merchant account boarding and tracking with UNLIMITED status levels + real-time reports
- Up to 20+ email notifications keeps your sales force up to date of status changes
- Create unlimited online applications for each bank/processor you are registered with
- NEW: Legally binding secure electronic signature capture from your website
- Upload and integrate your own PDF merchant applications and vendor contracts
- PDF documents are automatically generated with all fields populated on paperwork
- Email system allows users to communicate with administrators
- Invoices are generated for each merchant account with details of all user profits and costs
- Referral Partner form, merchant application form, and recruiting lead form

MERCHANT STATUS REPORTING SECTION

- Manually add or deduct miscellaneous items from the invoice
- Calculate and add up to 36-months of upfront residual commissions
- View the history of the residuals and processing volume for each merchant
- Change the users residual profit % by adding an override residual %
- Share Residual Profits for this Merchant with 2nd User
- Add new notes/comments as well as view the history of all notes and activity for the merchant
- Add a new Task/Reminder for the merchant
- Manage PCI Compliance tasks for the merchant
- Create new letter templates and send letters to each merchant with attached documents
- Non-Admin Users are not allowed to edit or delete merchant data and contact information
- Users are not allowed to view social security or bank account information (encrypted)

RESIDUAL REPORTING SYSTEM

- Calculates and sorts residuals by Month/Year, Vendor, User, Merchants, and Net Profit
- 8-level user account networking capabilities
- Multiple users can share in residual % per merchant account
- Setup default residual % profit sharing for all merchants
- Setup residual % profit sharing for individual merchant accounts
- Add additional users to share residual profits for individual merchant accounts

MULTI-LEVEL USER SYSTEM

- Multi-Level User Network and Profit Sharing
- 8-level user account networking capabilities
- Multi-level residual profit sharing with residual overrides
- Multi-level user system, user access rights controls
- Administrative, technology, underwriting, and customer service user accounts
- Sales office, sales manager, sales rep, and telemarketer user accounts
- Referral agent, referral partner, and trade association partner user accounts

COMPLETE CALENDAR AND SCHEDULING SYSTEM

- Calendar system
- View calendar by month, week, day
- Appointments
- Tasks/Reminders / Add attachments
- Events
- Holidays

Recurring events, tasks, and appointments:

- Appointment start time, end time
- Recurrence pattern by daily, weekly, monthly, yearly
- Recurrence every xx weeks on: Sun Mon Tue Wed Thu Fri
- Range of recurrence start date, no end date, end after xx occurrences, end by date

The Tasks section will allow you to do the following:

- All tasks are labeled by who created the tasks
- Tasks can be assigned to any owner
- Tasks will have a due date
- Tasks will have a priority level of Low, Medium, or High
- Tasks will have a status of Open or Closed

SUPPORT SECTION

- Daily reminders and alerts for all tasks and appointments emailed to users daily
- Trouble tickets, knowledgebase, news alerts, and document download library
- Attach documents to tasks/reminders, news alerts, knowledgebase articles, trouble tickets

OTHER TOOLS

- Recruiting and new hire lead inquiry and status system
- Send out Birthday wishes to users, merchants, leads, address book contacts
- Export mailing list reports for users, merchants, leads, and address book contacts
- Address Book System
- View Sales Statistics for top sales performers for the month or year
- Search tools, search the database for all your customers

MERCHANT DATABASE AND STATUS REPORTING SECTION

- View summary of new merchants submitted and “In Progress” for underwriting approval
- Ability to Edit all applications submitted
- Edit and change the status of all merchant applications “In Progress”
- Search for apps “In Progress” by App #, MID#, Merchant Name, or Bank/Processor name
- View all PDF documents for merchant application as well as uploading new paperwork
- System will automatically email all paperwork to the ISO/bank/processor

- View all DBA information
- View all equipment/software for merchant as well as download/programming options/prompts
- Track and manage check list of things to do for the merchant
- Track and manage check list of ATM options for merchant
- View the rates and fees for the merchant
- View invoice for the user who sold the merchant account with details of all profits and costs

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