

HOW TO REFER

Conversation Starters

For Internal Use Only



CONVERSATION STARTER

Providing our members the ability to accept credit and debit card payments



NEW ACCOUNT

- We appreciate you trusting us with your business checking account. We have a new program that allows our members the ability to process credit card payments.
- Our new program allows credit card transactions to be deposited the next business day.
- Our new program makes it easy for customers to make purchases on your website and social media platforms. This will increase revenue and customer engagement.

EXISTING ACCOUNT

- We appreciate you trusting us with your business checking account. We have a new program that allows our members the ability to process credit card payments.
- Often our members are paying too much in ancillary fees, our new program can uncover those fees and save you money.
- We have a program that can eliminate your credit card processing fees.
- Is your digital presence increasing your sales?

EQUIPMENT OPTIONS

On the Go



Contractors
Tow Truck
Flea Market
Food Truck

Retail/Service



Pay at the table
Automotive
Hair Stylist

Large Retail/Dining



Store Management
Inventory Management
Virtual Office
Customer Loyalty
Online Ordering

eCommerce



Shopping Cart
Online Store
Social Media
Payment Link

Secure Web Pay



Church
Non for Profit
Municipalities
Healthcare
Wholesale
B2B
Rentals

Contact your Relationship Advocate at
(888) 311-7248

Name of Business

Date of Referral

Date of Progress Check

Name of Business

Date of Referral

Date of Progress Check

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HOW TO REFER

Referring Through MAC

We want to make referring as easy as possible for you and your bankers. There are two ways to refer your business clients to us. The first is directly through MAC. To do this your bankers will need to have a login assigned to them. We can create hierarchies based on your needs as explained in the Implementation process.

1. Log into MAC and click on "New Lead"

The screenshot shows the MAC dashboard interface. The top navigation bar includes a search bar and buttons for Leads, New Lead (circled in red), Calendar, Helpdesk, and Documents. Below the navigation bar, there are tabs for Overview, Upcoming Tasks, Lead Overview, Last Viewed Merchants, Recent Activity, and Reports. The main content area is divided into several sections:

- Top Performers:** A table showing merchant performance from 4/01/2020 to 4/23/2020. The table includes columns for Merchants, Monthly Gross, and Transactions.
- Top Performers by Card Type:** A table showing the total and transactions for various card types.
- Portfolio Total by Card Type:** A table showing the total and transactions for various card types.
- Approved Deals:** A bar chart showing the number of approved deals over time.

Merchants	Monthly Gross	Transactions
LOUIES CAR CARE	\$13,299.73	48
SHORE WATER AND DAGSBOR	\$12,554.67	48
KINGS	\$12,175.48	266
GRAND TRAILS CORP	\$7,658.50	16
MEADE ACTIVITY CENTER	\$6,909.80	272
BEST IMPRESSIONS	\$3,075.06	8
Top Performers Total	\$55,673.24	658
Portfolio Total	\$55,673.24	658

Card Type	Total	Transactions
MasterCard	\$19,250.85	237
VISA	\$31,428.61	368
Discover	\$2,184.28	31
AMEX	\$2,530.99	19
Pin-Debit	\$278.51	3
Totals	\$55,673.24	658

Card Type	Total	Transactions
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Discover	\$2,184.28	31
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Totals	\$55,673.24	658

The 'Approved Deals' bar chart shows the number of approved deals over time, with a peak in July 2019.

2. Fill out merchant information - red asterisk is required information

3. Click on "Create My Lead"

MAC

Referral Source - Associate

Leads New Lead Calendar Helpdesk Documents Search

Lead Form

Business Profile Digital Marketing Estimated Revenue

Referrer Name

DBA Name *

Address * Search Map Suite

City * State * ZIP *

DBA Phone * Ext

Contact Name *

Contact Phone

Mobile Legal Fax

Business Email

Website Address

Product/Services Sold

Status

Category: New Referral

Status: Sales Agent Assigned

Select Group

Referral Source - Main

Select Campaign

None

Select Lead Source

None

✓ Create My Lead

4. Type in any notes that your Relationship Advocate will need to know about this merchant, such as, best time to contact, etc.

5. Click the "Post" button

5. Click the "Save" button

MAC

Referral Source - Associate

Leads New Lead Calendar Helpdesk Documents Search

My Sample Merchant

Business Profile Digital Marketing Estimated Revenue

Referrer Name

DBA Name * My Sample Merchant

Address * 1234 Main Street Search Map Suite

City * Narrows State * VA ZIP * 21421

DBA Phone * 540-555-1212 Ext

Contact Name * Jane Doe

Contact Phone

Mobile Legal Fax

Business Email

Website Address

Product/Services Sold

Current Lead Status

Category: New Referral

Status: Sales Agent Assigned

✓ Save Created: 04/27/2020 In Current Status: less than a minute Not Saved: less than a minute ago

Assigned Users

Referral Source - Associate (Referral Ptnr A ssoc)

--- Select User to Assign --- + Assign

Actions

Duplicate Link

Associated Merchant & Lead Records

Lead Group

Referral Source - Main

Lead Campaign

None

Lead Source

None

Notes (0) Attachments (0) Tickets (0)

Pin Note To Top Filter (9/9)

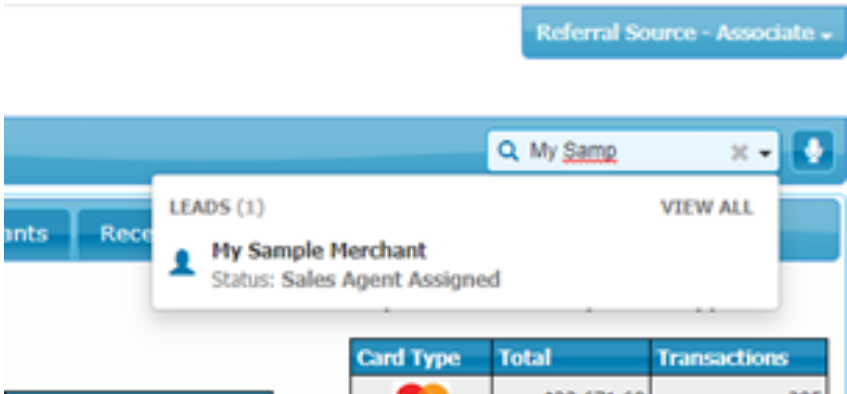
Enter your note or copy and paste an image.

Notify Users: Notify All Assigned Users

Clear Post

Your referral is now a lead in MAC and will be sent directly to your Relationship Advocate in both and email and with a notification in MAC ensuring that they receive the information and can call the referral as quickly as possible. They are required to call within one business day but in practice it is usually within an hour or two at the latest.

You can search for your lead by starting to type in the name in the upper right-hand corner search bar. By clicking on the lead that comes up you will be taken to the lead page allowing you to see notes, status and any other activity that has taken place in your referral, regardless of by whom.



HOW TO REFER

Referring Through Web Portal

1. Your IT department takes a link provided by Evolv and places it on your Intranet.
2. Your staff goes to that link and clicks on it.
3. A form fill will come up.
4. Fill in all relevant information - red asterisks are required fields.
5. It is important to put in referrer name and branch so that you can get credit for the referral.
6. Click the submit button at the bottom of the page.
7. Your referral is then ported into MAC and routed to your Relationship Advocate.
8. Your Relationship Advocate is required to contact the merchant within one hour.

Business Info

DBA Name *	
Business Name...	
Address *	
City *	
State *	
Zip Code *	

Business Contact Info

First and Last Name *	
Email Address *	

Phone Numbers

Business Phone * (Format: 123-456-7890)	
Business Phone Ext	
Cell Phone (Format: 123-456-7890)	
Fax Number (Format: 123-456-7890)	

Other

Website	
Year Established	
Financial Institution Customer	

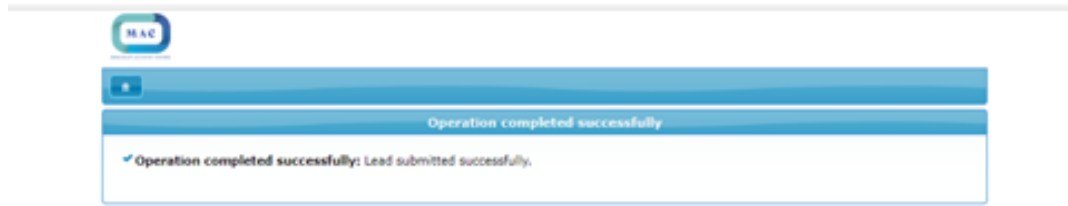
Products

Describe Products/Services	
Projected Annual Card Volume	
Average Sale Amount (\$)	
Current Processor	
Currently Accepts Visa/MC/Discover/AMEX	

Referrer Information

Referrer Name *	
Referrer Phone * (Format: 123-456-7890)	
Referrer Email *	
Bank Relationship	
Branch *	
Comments	
Submit	

Example of a successfully submitted referral through the provided referral page



Bank Referral Process Flow

