



AGENT: _____

MERCHANT: _____

OWNER: _____

PHONE: _____

CURRENT SETUP

- | | |
|--------------------|--------------------|
| Visa | Recurring Payments |
| MC | Mobile Payments |
| Disc | ATM Machine |
| Amex | Open Loan |
| Debit | Ecommerce |
| Gift Cards | Other |
| Loyalty Cards | |
| EBT | |
| Fleet | |
| JCB | |
| Check Guarantee | |
| Check Verification | |
| ACH | |

Your Processor

Would you rate them:
 Great Average Poor

EQUIPMENT

- | | |
|-------------------------|-----------|
| Terminal Model | Placement |
| Virtual Terminal | Ethernet |
| POS Software | Dial Up |
| Mobile Device | Wireless |
| Own | EMV |
| Lease | Applepay |
| Term _____ Amount _____ | |
| Rental | |
| Amount _____ | |

Equipment Rating:
 Great Average Poor

NEEDS

- | | |
|---------------------|----------------------|
| Faster Processing | New ATM Machine |
| Next Day Funding | Gift/Loyalty Program |
| Better Tech Support | Ecommerce |
| Local Support | Check Services |
| New Terminal | Working Capital |
| New POS Software | Mobile Payments |

CURRENT EXPERIENCE

How long with your current processor? _____ Cancellation Fee? _____

What do you like best about your current processor - Please explain

What, if anything, would you change - Please explain

Your reasons for considering a change: Rates Service Technology All
 How soon are you looking to change: Immediately Within 30 days Unsure

COMMENTS