

# Sales Process



## Statement

1

A: Connect with merchant prospect and ask questions to learn their needs and priorities/values.

B: Collect merchant services processing statement for analysis.

C: Submit statement & completed Needs Analysis (with any equipment info/needs) To VMS:

[statements@valuedmerchants.com](mailto:statements@valuedmerchants.com)

Fax: 877-885-1740

Text: 208-313-9141

(Copy your Manager/Sales Coach)

D: Completed statement analysis will be emailed to you within 24 hours. Will include equipment options if current equipment info is submitted with statement.

E: Get Paid Weekly!

\$25 (1-10 Statements per month)\*

\$50 (11+ Statements per month)\*

\*Must maintain 25% closing ratio for statement bonus

## Application

2

A: Present completed analysis to merchant prospect.

(Tip: Arrange ahead to have Manager/Sales Coach available for questions during presentation.)

B: Items needed for presentation:

- > Prepared Merchant Application
- > Completed statement analysis
- > Completed Needs Analysis

C: Explain equipment reprogram, terminal swap, POS integration, Gateway/Virtual Terminal activation or new equipment delivery details.

D: Fill out & submit completed Merchant Application + Voided Check (& any other requested docs) to VMS:

[applications@valuedmerchants.com](mailto:applications@valuedmerchants.com)

Fax: 877-885-1740

Text: 208-569-4289

(Copy your Manager/Sales Coach)

Watch your new VMS email address inbox for emails indicating any underwriting items needed.

## Activation

3

A: Watch your VMS email inbox for confirmation emails:

Application Received, Status, and Approval/Activation

(Generally takes 24-96 hours, depending on business type)

B: Merchant Approval email will include:

- > New Merchant ID
- > PCI Compliance Instructions
- > Tech Support Contact Info
- > Equipment Shipping, Activation and Programming Info

C: Agent should assist merchant with installing equipment.

D: Provide merchant with Contact Info for:

- > Local Agent (yourself)
- > VMS Office
- > Platform-Specific 24/7 Customer Service and Tech Support

E: Schedule with merchant for a follow-up within 30-45 days.

## Payroll

4

A: Once a merchant processes two days of customer payments, submit account for payroll.

Text/Call: 208-313-9141 or Email: [heather@valuedmerchants.com](mailto:heather@valuedmerchants.com) (Submit by Thursday Noon Pacific Time to be paid Friday.)

B: VMS will verify processing activity.

C: Agent will receive confirmation email with payment amount.

D: Weekly payouts include:

- > Account Activation
- > Equipment Commission
- > One-Time Fees

E: Residuals for new accounts will start at end of month following first month's processing. Monthly Residual Income on all accounts paid automatically before the last day of the month.\*\*

\*\*Exception for February and holidays