# 5 Steps to Your First Sale

1. **Get a copy of the merchant's credit card processing statement.** Fax it to your sales manager and you'll receive a savings analysis. If you are faxing it from the merchant's location, call your manager and notify him/her that you're on location and you need it rushed.

2. **Offer the merchant the savings analysis & ask for the sale. DO NOT give this form to the merchant!** They will show it to their current processor and stay where they are!! Sell them on the savings and offer them the best LOCAL customer service!

3. **Fill out the New Merchant Intake Form.** This is ONLY a worksheet so you'll not need it signed YET. Fill out ONLY the top two sections completely. Your sales manager will help you fill out the rest when you fax it to him/her.

4. **Get the merchant to sign the agreement and get a copy of a voided check.** Your sales manager will send you the entire agreement(s) for signatures. There are initials or signatures on every page. If you miss one, you'll have to go back…DON'T MISS ONE!

5. **Deliver and setup the new terminal.** If the merchant is leasing or purchasing a terminal from you, it will come pre-programmed. You only need to plug in the phone line or Ethernet and the power. If you're reprogramming a terminal(s), tech support will walk you through this process button by button so don't worry about the details in this step.