MX™ CONNECT TIPS + ENHANCEMENTS
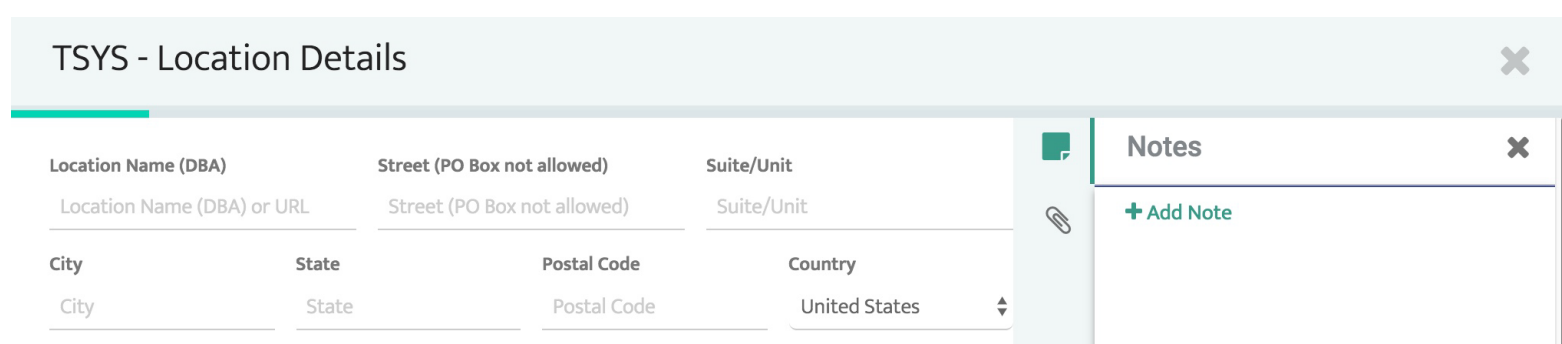**Core Concepts** for Early Adopters
January 2019

MX™ Connect Recent Enhancements

We are excited to provide you with a few powerful enhancements made to MX Connect's boarding process—making the boarding process even more streamlined. We have also added a report allowing you to review Merchants who may be at risk to leave. With these latest improvements, we think you'll be eager to begin using these new features as soon as possible so we've provided a look into each. We welcome any questions and feedback and thank you as always for being an Early Adopter to MX Connect!
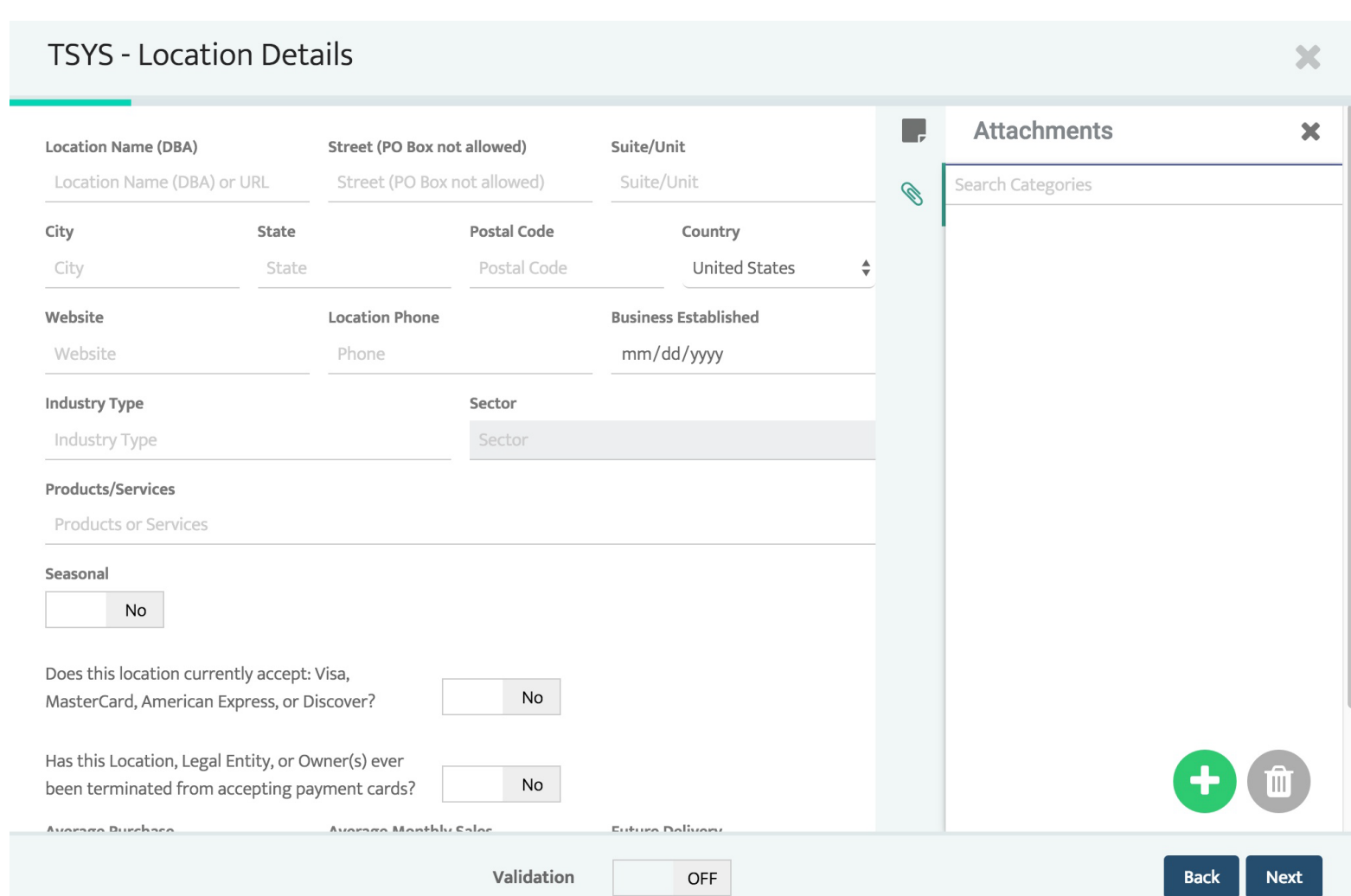
Merchant Boarding Updates

Add a Note for Underwriting

A Note for Underwriting may now be added during boarding. This option is found as you move throughout the boarding process making it easy to add a note while you're still thinking about it!
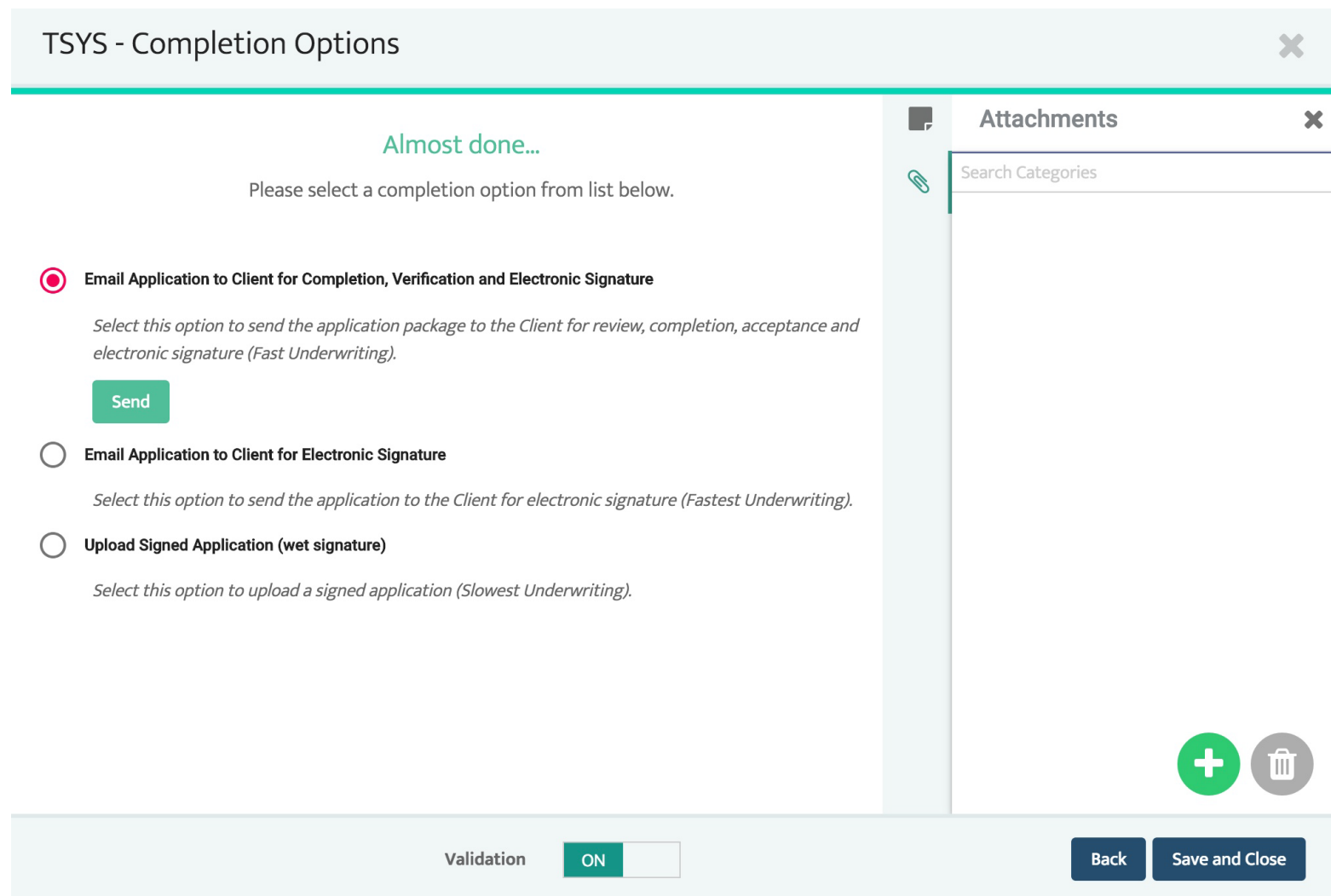

Upload Attachments

Documents may now be added during the boarding process. As with Notes, Attachments may be uploaded throughout the boarding process to assist you when you're ready.
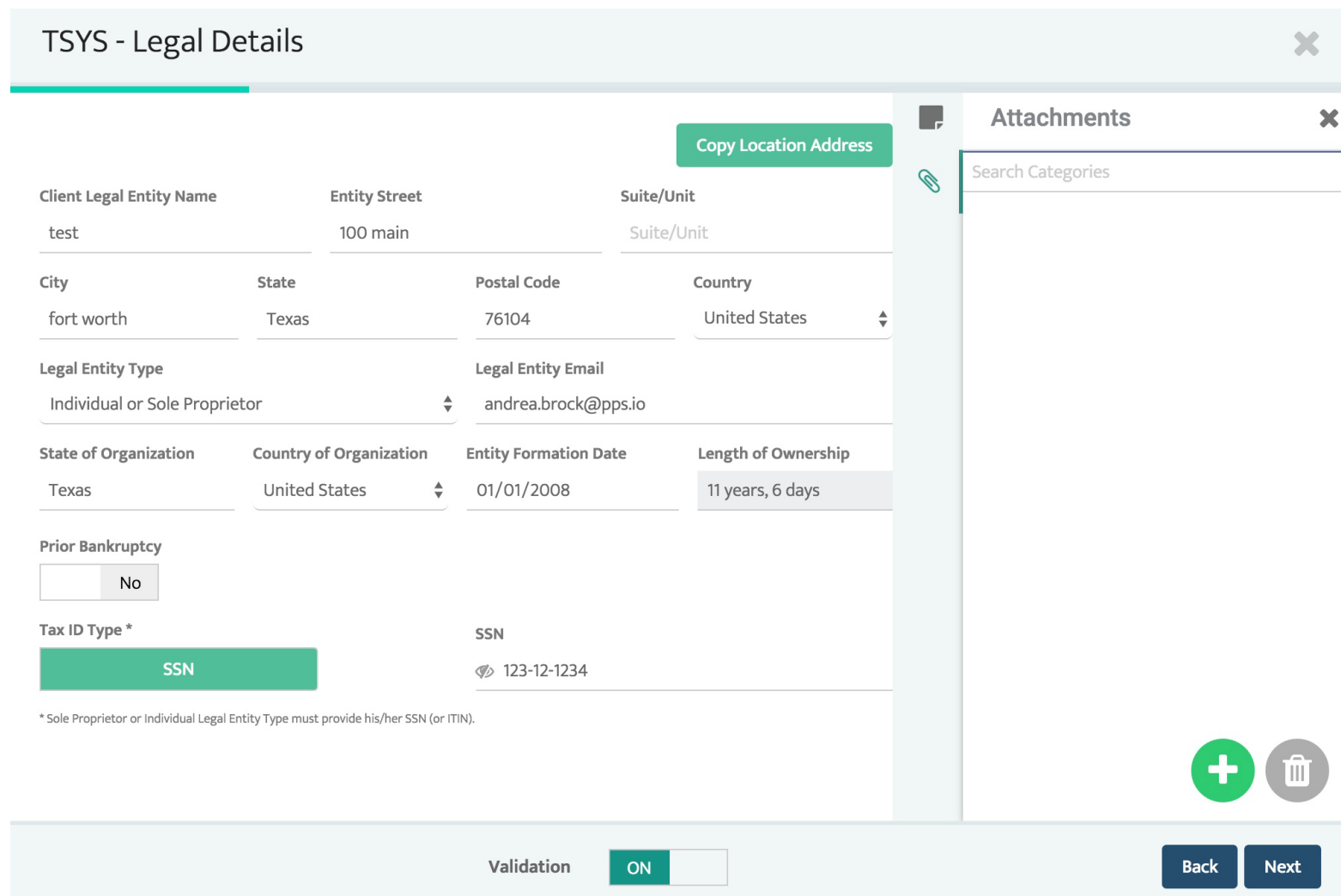

Submit a Paper Application

You can now submit an Application without requiring the Merchant to sign electronically. This means you will set the Validation link at the bottom of the screen to On, complete the Merchant Application entirely and upload the scanned signed docs along with any supporting documents. Three options are now posed on the final screen with a description of each ensuring you understand next steps.

When completing the Legal Details, the Length of Ownership is now auto-calculated so we do the math for you saving you time!

Reporting Update

Flight Risk Report

If a Merchant has downloaded the past 3 months of consecutive statements, a red label will appear when reviewing the Merchant account. You can also type "Flight Risk" into the global filter found at the top of the Clients screen and all Merchants with this label assigned will appear. The red label shows "Flight Risk" indicating the merchant may have downloaded these statements to review with the competition. Be proactive and reduce attrition with this new feature today!