





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

X 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!

TSYS - Location Details							×
Location Name (DBA)		Street (PO Box not allowed)	Suite/Unit			Notes	
	(DBA) or URL	Street (PO Box not allowed)	Suite/Unit		Ø	➡ Add Note	
City	State	Postal Code	Country				
City	State	Postal Code	United States	•			



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.

TSYS - Location Details							×
Location Name (DB/	A) DBA) or URL	Street (PO Box no	nt allowed)	Suite/Unit Suite/Unit	•	Attachments Search Categories	×
City City	State State		Postal Code Postal Code	Country United States	. 0		
Website Website		Location Phone Phone		Business Established mm/dd/yyyy			
Industry Type Industry Type			Sector Sector				
Products/Services Products or Servi	ces						
Seasonal No	currently accept: ican Express. or D	Visa, iscover?	Νο				
Has this Location, I been terminated fi	Legal Entity, or Ov	wner(s) ever yment cards?	No	Euturo Dolivory			
			Validation	OFF		в	ack Next



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.



			+
Validation	ON	Back	Save and Close

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

TSYS - Legal D	etails					×
Client Legal Entity Name test	Entity Street 100 main		Copy Location Address Suite/Unit	•	Attachments Search Categories	×
City fort worth Legal Entity Type Individual or Sole Proprie State of Organization Texas	State Texas etor Country of Organization	Postal Code 76104 Legal Entity Email andrea.brock@pp Entity Formation Date	Country United States os.io e Length of Ownership	•		
Prior Bankruptcy No Tax ID Type * SSN * Sole Proprietor or Individual Legal E	Entity Type must provide his/her SSN (SSN (1) 21, 2000 SSN (2) 123-12-1234 or ITIN).				+ 🗊
		Validation	ON			Back Next

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!

	= 2 Flight	Flight Risk (Risk) 🗙	andrea.brock+CT@pps.io 👻	2
✿ Dashboard <	Client:			
⊚ Merchant ~	Search Search	Group By - Filter - Status: APPROVED, CONDITIONALLY 🗴	:	
App Engine Applications	Client Entity Name	Location Name (DBA) Product Account Number S	itatus Dates	



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