



Hybrid Agent

Simple steps to streamline your new account onboarding

Quote

The first step to providing a merchant a quote is obtaining the right information from them. The following will assist accounting in estimating an accurate pricing for the merchant.

Please Note: If you complete your own pricing, please keep the Schedule A in mind.

- Goods Sold/ Business Type - (what do they sell or what do they do)
- Acceptance method (Stand Alone Terminal, mobile pay, POS, Web, or Virtual Terminal)
- Percentage of card swiped transactions, ecommerce, or MOTO (mail order/telephone order)
- Estimated Total Annual Volume (Can be provided by a previous statement or estimated by new business)
- Average Sale- what is the dollar amount of their average transaction
- Time in Business

Proposal

Once the cost analysis is complete and you confirm agreement with pricing you will present to merchant the following provided by Hybrid:

- Cost Benefit Analysis or Comparison (for existing businesses)
- Merchant Processing Application (MPA)
- Conditional Fees
- Product Guide and confirmation page
- Terminal Agreement, Terminal Download Form / Software Registration Form if applicable

New Account Submission

You will need the following to successfully submit a new account for onboarding with out delay

- Completed Merchant Application (all 4 pages initialed, last page signed)
- Voided check form signed with attached voided check or Bank Letter matching DBA or Legal/IRS Name
- Product Guide confirmation page signed
- POS Integration/ Terminal Download Form

Merchant Onboarding

Once your application is approved by accounting, onboarding is initiated. Depending on volume this process is completed same day. Best practice is to return a completed application before 11am EST. When on boarding is completed and approved before 4pm EST, an account is ready for processing the next business day in most cases.

customerservice@hybridpayments.com

Fax: 888-846-4953



Agent Checklist

Questions for Cost Analysis

- New or Existing Business _____
- Annual Volume _____
- Average Ticket _____
- % Swiped _____ %Keyed _____ %MOTO _____ %Ecommerce _____
- What do they do/ sell? _____
- How are they accepting cards _____ (POS, Virtual Terminal, Stand Alone, etc.)

What to Send Back for Boarding

- MPA
- Voided Check or Bank Letter
- Product Guide Confirmation Page
- Terminal Download Form or POS Software Specs _____
(POS Brand, Software Name, # of Stations, Version, and required gateway)
- Back up processing method _____
- Processing Date / Install Date _____
- Training necessary? _____
Contact name and number for training _____