



# **Utility Advocate Merchant Service Process & Policies**

- 1.** UA Sales Rep presents Merchant Service marketing flyer to client and asks if they would like to have UA obtain a free cost saving proposal on their behalf. Note that we have been able to find savings for over 95% of the submissions that we have priced.
- 2.** Sales Rep completes UA Merchant Service Submission Form with the client.
- 3.** UA Sales Rep obtains the client's most recent available Merchant Service bills (all pages).
- 4.** UA Sales Rep emails the Merchant Service Submission form and the merchant service bills to [merchantservices@utilityadvocate.com](mailto:merchantservices@utilityadvocate.com) or faxes them to (203)262-6001 Attn: UA Merchant Services.
- 5.** Upon receipt UA will review for completeness and then forward to Premier Payments for pricing. Note that you will be contacted by UA for complete bills if any pages are missing before UA will submit to Premier Payments or one of our other approved partners.
- 6.** Within 1-2 business days after a complete package has been received, Premier Payments will complete a cost savings proposal and email it to UA.
- 7.** Within 24 hours of a completed proposal a sales representative from Premier Payments will contact your client to make the cost savings proposal directly to them and attempt to close the sale on behalf of the UA Sales Rep.
- 8.** Upon acceptance from the Client, Premier Payments will ask the Client to complete an application. Within 3-5 business days after receipt of a completed application, the Client will be notified of the underwriting decision.
- 9.** Premier Payments will contact the Client with the decision, issue the client a merchant ID#, order new equipment, or schedule a reprogramming date if the client is using a POS system that needs to remain with their existing equipment.
- 10.** UA will notify the Sales Rep about the closing via a phone call or an email and a CAB will be paid the next appropriate pay period.