**Steps to do a qualify appointment EPSG:**

-Make sure you are speaking to the owner of the business or the person who takes care of the merchant account,

-Get full name of person you spoke to.

-Name of business.

-Address of business.

-Best call back number

-Mention reason of the call (either 4% option or 20% savings)

-Appointment set up date Monday-Friday. (Unless owner needs different)

-Appointment set up time 10:00am to 5:00pm. (Unless owner needs different)

-Same week appointment, push for next day at least 24 hrs. In advance.

-Ask for email

-Close the call with “Greg and Barry will give you a call back 30 minutes before….”

-Proper and professional notes of appointment

**NOTE: If the appointment is made in Spanish it MUST have English notes and agent MUST ask if they need a Spanish or English consultant.**