**Executive Summary**

**Welcome Kit Project**

**Goals**

* Increased and immediate access to MXMerchant application
* Reduced cost of handling Welcome Kits
* Increased viewability of the Welcome Kit T&C’s and other important information

**Current Process**

* Upon approval from Underwriting, account is added to a “send Welcome Kit” queue in MXA and the assigned staff works to assemble and mail a welcome kit. Kit is normally sent within 2 weeks of account going live
* Kit costs approximately $6 including staff time to put together and mail
* If address on file is incorrect, kit is returned undeliverable and sent to Client Service to review
* Client Service staff calls owner of account to correct and re-mail Welcome kit

**Proposed Process Flow**

* Upon approval from UW, notification email sent to merchant using email address provided on MPA (need to put additional wording that “email address provided will be used for important communication” ) (additional validation that email address is correct) to require merchant to complete login to MXM and acknowledge Terms and Conditions, get window stickers, QRG’s, etc. email would contain:
  + Welcome to Priority letter (branded for registered offices)
  + Mxmerchant.com URL
  + Temporary password
  + Initial login would require validation of two pieces of information contained on MPA
* Once logged into MXM, a pop up would appear for the user to “Acknowledge” receipt of the Welcome Kit information. If they didn’t click on the popup, an email would continue weekly (for a month) until acknowledgement was completed. If acknowledgement not completed, account would be notated as such
* Merchant would be directed to a new tab in MXM to review/print Welcome letter, T&C’s, Fraud prevention documents, order free window decals, QRG’s, paper rolls and get important telephone numbers (order would route to TPG for processing/ via API)