

# New Application and Add On Sale process

## Quick Reference Guide

Follow the steps below for a **New Application**:

Step	Action
1	Check customer's ID and if available proof of address.
2	Log into the Merchant Portal.
3	Click on <b>New Application</b> .
4	1. Complete application. 2. Click <b>Submit</b> .

### Result:

If the result is...	then...
<b>APPROVED</b>	1. Print Disclosure Statement for the customer to read along with COU booklet. 2. Click <b>Customer Accepts</b> if your customer wants to proceed. 3. Print eSales Voucher for your customer. 4. Click <b>Submit for Settlement</b> once your customer has received the goods or services.
<b>REFERRED</b>	1. Follow the prompts on screen and ask your customer to provide required documents. 2. Fax, scan or email the documents to Cards Lending; refer to the secure Document Upload Quick Reference Guide for more information on how. 3. Application should be updated within <b>1</b> hour. If not contact Cards Lending team for update.
<b>DECLINED</b>	Contact Cards Lending team on <b>0800 802 702</b> to check if the application can be reassessed.

Follow the steps below for an **Add On Sale**:

Step	Action
1	Check customer's ID.
2	Log into the Merchant Portal.
3	Click on <b>Add On Sale</b> .
4	Complete all fields with information supplied by your customer.

### Result:

If the result is...	then...
<b>APPROVED</b>	1. Click on <b>Continue</b> . 2. Print the eSales voucher for your customer. 3. Click <b>Submit for Settlement</b> once your customer has received the goods or services.
<b>REFERRED</b>	Contact Cards Lending team on <b>0800 802 702</b> to check if the add on can be reassessed.

**Application or Add On Sale declined?**

Contact **Cards Lending** team on **0800 802 702** to check if the **application** can be reassessed.

