

HOW TO LEVERAGE SALES SUPPORT TOOLS

Branch Updates

Ongoing updates are provided to branches on a weekly basis from the sales teams.

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Weekly Branch Account Executive Newsletter

- MTD Branch sales leads
- Cross referrals
- Branch employee highlights
- Banker campaigns and merchant offers
- Sales' branch visit schedule

Contact your Partnership Manager or Account Executive if you are not receiving weekly newsletters.

Customer Care

Answers–Support–Service–Expertise

- **Our goals:**
 - Improve Awareness and Education on Service Model
 - Educate on Multiple levels of support and resources
 - Partner Assist – for bankers
 - Merchant Assist – for merchants
 - Gain Bank Management support on Model for optimal results
 - Implement Communication Plan through your RM



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**ANSWERS. SUPPORT.
SERVICE. EXPERTISE. 24/7.**

Customer Care

Your customers are our customers, so you can trust us with the service they need – and the confidentiality, care, and expertise they expect. Once our sales executive signs a business customer and the customer begins processing with Worldpay from FIS, our friendly, knowledgeable customer care teams are available to assist with payment processing inquiries.

Count on us
Great relationships are earned, and we are committed to customer retention efforts and maintaining high-levels of customer satisfaction. Worldpay from FIS proudly boasts years of consecutive customer service leadership recognition from the major card brands including Visa and Mastercard.

Partner Assist - dedicated to serve our bankers
Your bank staff can count on the Partner Assist team to help 8 am-8 pm EST when calling on behalf of a processing customer account. Contact the Partner Assist team and they will quickly work with your customer to get the question answered. You will receive continual communication from the Partner Assist team until the inquiry is resolved.

Merchant Assist - dedicated to serve our processing customers
Your customers can count on the Merchant Assist team. Available 24/7 via phone and email, this team handles all financial inquiries including merchant authorizations, chargebacks, statement and billing issues, and online reporting. Customers can find helpful information in their Worldpay welcome kit.

Bank partner name

Partner Assist 866-632-7774 vest-rpt@servicingteam.com	Merchant Assist 888-720-6832
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For more information:

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Sales Leave Behinds

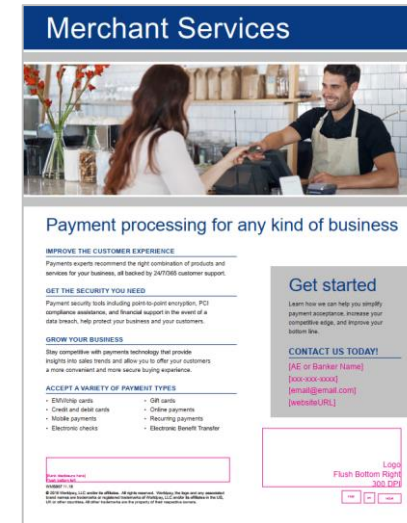
Merchant Solutions Overview

- Credit and Debit Card Acceptance
- Point-of-Sale Solutions
- Fraud and Data Security
- Reporting and Analytics
- Customer Support

Individual Products & Solutions

- SmartPay Series
- BigCommerce
- FastAccess Funding
- Data Security
- PCI Compliance
- Terminals
- Gift Card Program

Business Cards



BigCommerce



SmartPay Series



FastAccess

Partnership Manager or Sales team can order print or digital material through Custom Point.

Post-Sale Support

Once the deal has closed, sales teams help the merchant through a smooth transition.

What's Next Documents

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THANK YOU FOR ALLOWING US
TO EARN YOUR BUSINESS.

What happens next...

Now that your application for processing has been completed, please reference this document throughout the implementation of your new account.

Step 1 Application Process - (Boarding and Underwriting)

Your Account Executive will submit your application to underwriting for review. Once a decision is made regarding your application (typically within 24-48 hours), you will receive a follow up call/email from your Account Executive.

- We may determine further documentation and information is required in order to process your application. Examples: Checking Account Statements, Marketing Materials, Tax doc proving tax ID, or in some cases of high ticket or volume, audited financials.

Step 2 Equipment - (Welcome Kit and Shipping)

You will receive your equipment if provided by us and a welcome kit typically within 5-7 business days after approval of your account, unless you opted for overnight delivery. When you receive your equipment and welcome kit, please review its contents and contact your Account Executive with any questions. Your welcome kit will also contain your new Merchant ID Number.

- If a lease option was selected, the leasing team will review the application.
- Within 24-48 hours, we may determine further documentation and information is required.

Step 3 Setup, Activation, and Training

Once you have received your equipment and welcome kit, it's time to activate your account. We've made it easy with the support of our Merchant Activation Team (MAT), a highly trained group of installers who will get you up and running right away.

- When you receive your equipment, contact MAT at 866.622.2907 to schedule your activation and training. Please allow a minimum of 30-45 minutes to complete your activation and training.
- If you are using software or a PC based system, your Account Executive will provide your processing parameters to you once your account has been approved. Please provide this information to your third party software or PC system provider so they can configure your system to send transactions to Worldpay from FIS. Should you have any questions during the activation process, please contact the MAT team.

Step 4 PCI Compliance

To help ensure that your new merchant account is compliant with all PCI Data Security Standards, you will need to complete your PCI Security Assessment Questionnaire within 60 days of approval of your account. You can complete your questionnaire by going to <https://pci.trustrave.com/pci-assist>. Should you need assistance while completing your questionnaire, please call our PCI Support team at 877.246.2801.

If you do not complete your PCI Security Assessment Questionnaire within 60 days of approval of your account, a non-compliance fee will be charged each month until compliance is met.

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SMARTPAY SERIES

What happens next?



Thanks for choosing SmartPay Series. Setting up your new SmartPay device is worth doing right the first time – let the experts help so you can get back to running your business. SmartPay Series Concierge Service helps you successfully get up and running with your new SmartPay device. Our SmartPay device experts help ensure a smooth transition to your new equipment for you, your employees, and your customers.

SMARTPAY SERIES CONCIERGE SERVICE IS AVAILABLE AND CAN BE REACHED AT 888.829.7957 OR SMARTPAYCONCIERGE@WORLDPAY.COM

Welcome email

You will receive a welcome email from merophy@worldpay.com to schedule your SmartPay activation. Additionally, you will receive welcome emails for all pre-loaded applications. In the email, there will be a link to schedule activation.

Make sure to schedule your activation

Activations are by appointment only and are available Monday-Friday, 8am-8pm EST. Be sure to choose a day and time that is at least three business days from the date of your device shipment. Make sure your new device is charged and connected to Wi-Fi in preparation for your activation call. During your call, our SmartPay concierge team will work with you to get your device activated.

If you've selected the Silver or Gold software bundles, you'll want to download the templates (in the welcome email) to customize your point of sale and have them completed and sent to SmartPay Series Concierge Service at least 24 hours before your activation call.

We're here for you

We're not done yet. We make sure you and key members of your team are comfortable with your new SmartPay device. Our team walks you and your team through common daily operations, such as sales processing, voids, returns, menu modifiers, new menu or catalog options, and more. We'll also take you through the online help you may need to keep you confident, taking payments like a pro.

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Partnership Manager or Sales team can order print or digital material through Custom Point.

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Content Support

Content can be used for banker newsletters, intranet sites, social media channels, or other methods bank partners prefer to promote merchant services internally or externally.

- Referral process
- Videos
- Web page
- Bank newsletters
- Intranet sites
- Social Media
- Conversation starter tips
- Collateral catalogs



Visit worldpay.com/partnerportal to directly access these materials and more to educate and promote the merchant services product line.

Bank Staff/Branch Education & Awareness

Worldpay provides resources for bank staff to become familiar with the right questions to ask to make a referral as well as get the support they need.


Post banker resources where bankers frequent:

- Intranet sites
- Breakrooms
- Branch meetings
- Banker newsletters
- Desktops

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**MERCHANT PROSPECT
CONVERSATION STARTERS**

Finding conversation starters that work is as easy as understanding what type of product or service the client is conducting to consider which topics will be of interest to the merchant. The following are several situations you will experience with your merchants.



Top questions for bank customers from tellers and managers:

- Are you a business owner?
- Does your business accept Credit Cards?
- Do you understand all the fees applied to your monthly merchant services statement?
- Did you know that we offer competitive merchant services solutions?
- Would it be ok if we had someone call you to set up an appointment to discuss our solutions and offer a no-obligatory free analysis?

Opening a New Business Account

Part of opening a new business account is understanding what the need is to build a successful business. A merchant account or the acceptance of non-cash payments will be a major part of their income.

Conversation Starter: "As a bank customer I would like to inform you that one of our many business products includes merchant services. May I ask our merchant account specialist to contact you to discuss ways to help you build a non-cash payment package to better convenience your clients?"

Marketing and Increasing Foot Traffic

There are many ways to add value to your clients' business; one of them is using Gift Cards.

Conversation Starter: "Did you know that offering gift cards to your clients and neighboring businesses is a great way to advertise and drive more traffic to your business? May I ask our merchant account specialist to contact you to further discuss options tailored for your business?"

Seeing Another Processor's Deposits

When you are assisting a merchant with their banking needs, you may see another processor servicing your client and depositing for their merchant services. Politely ask if they would be willing to speak with us to reduce risk and review their current services.

Conversation Starter: "I see that 123 Merchant services is depositing funds to your business account. We currently offer Merchant Services. May I ask our merchant account specialist to contact you to see what tailored services we can provide your business?"

Depositing of Large Amounts of Cash & Checks

When you see merchants who deposit stacks of cash and checks on a weekly/daily basis.

Conversation Starter: "We provide several payment methods that you could offer at your business that could be beneficial to you and at the same time save you time & money. May I ask our merchant account specialist to contact you to discuss ways to build a solution for your business?"

If your customer would like to set up an appointment right away, please contact me today.

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Partner Assist: 866.632.7774
Merchant Assist: 855.584.7550