

# MERCHANT SERVICES QUICK REFERRAL GUIDE



Identifying and referring a merchant lead is easy. Any business that accepts credit cards for payment is a prime candidate for Worldpay's products and services. Your existing business checking account and treasury management clients are perfect prospects.

## Questions to ask a prospective merchant

- Are you currently accepting electronic payments?
- Are you getting everything you need from your current processor?
- When is the last time you did an "apples to apples" comparison?
- Do you currently understand what you are paying for Merchant Services?
- Has anyone ever walked you through your processing statement?
- Do you ever struggle with bringing back repeat customers?
- What is the expected volume and average credit card sale amount?
- If currently accepting cards, may I have a copy of a prior month's merchant statement?

## The referral process

Simply enter your lead's information in our Web to Lead Form provided to your financial institution. All leads will automatically be routed into the appropriate database and filed under your dedicated Account Executive in Worldpay's CRM real time. The referred merchant will be contacted within 24 hours to schedule an appointment.

## Tracking your leads

Your financial institution will receive monthly referral reports indicating the status of your referrals. You will receive an email with confirmation of your referral, along with subsequent emails informing you of updated action steps on each of your referrals.

**Lead Information** Submit Clear

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**Company Info**  
 Use this section to provide business name and physical address of the business you are referring.

DBA Name

Address

City

State

Zip

Country

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**Contact Info**  
 Use this section to provide the name and contact information of the person whom we should contact regarding merchant services.

Contact First Name

Contact Last Name

Email Address

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**Phone Numbers**  
 Use this section to provide the Phone Numbers of the person whom we should contact regarding merchant services. *Field 1 (Phone Number) is required.*

Phone Number

Phone Ext

Cell Phone#

Fax Number

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**Products**  
 Use this section to provide additional information about the merchant so that we can determine which merchant products would be most suitable for them.

Describe Product/Service

Projected Annual Card Volume (\$)

Currently Accepts Merchant

Average Sale Amount (\$)

Current Processor

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**Comments**  
 Use the free-text area to provide additional information, such as preferred phone #, best time to call or any other information that you would like to provide.

Comments

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**Referral Information**  
 Please fill out the required fields for proper lead submission. Please enter your first and last name in the "Employee Name" field. Please enter the Bank Office Number/Name in the "Office" field and

Employee Name

Bank Office #

Employee Phone

Employee Email

Campaign Name

Customer First Name

This section is used to tell your representative about the company that you would like for them to call on.  
 Required Fields: DBA Name, City & State

This section covers who to contact at the company.  
 Required Fields: Contact First Name, Contact Last Name

This section covers how we can contact the prospect.  
 Required Field: Phone Number

Additional Information can be entered here. Would you like to provide statements for a rate review? Click on the Browse button and upload them right from your computer!

This section allows you to enter any notes that you would like the rep to be aware of!

Tell us about you. Required Fields: Employee Name, Employee Email, Region (if applicable) & Branch