

Instructions to Worldline Partner community

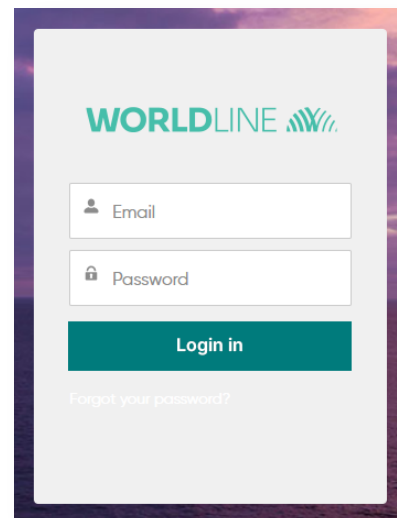
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1. How to log in to Partner community

You will have received a link from Salesforce to your email. By clicking this link you can choose password and thereby activate your account. Please note that the link is only valid for 72 hours.

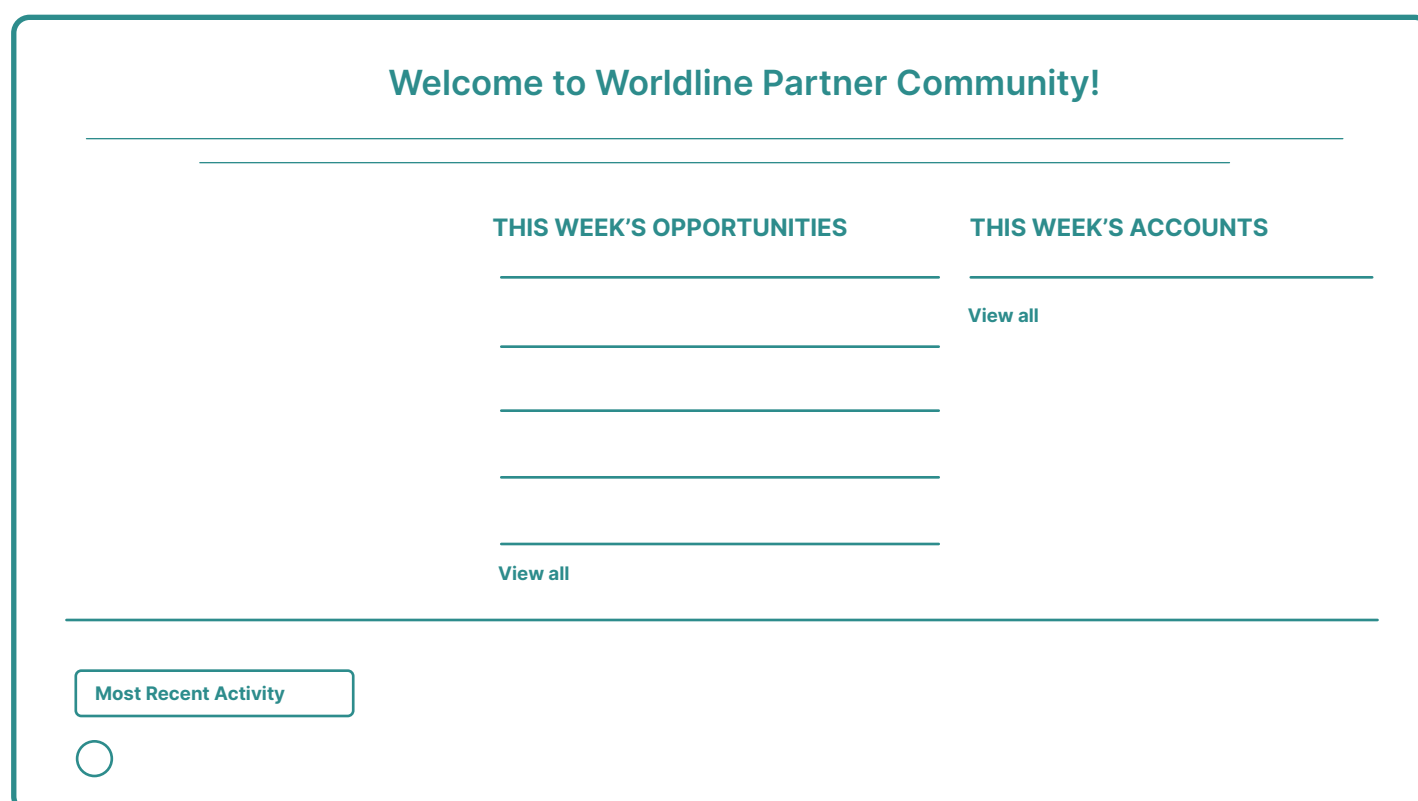
If you did not receive a link or if the link is no longer valid, please contact partner service in respective country as found in section 7. Contact details.

Go to <http://partner.bambora.com> to sign in. The username to log in is your email address.



2. Partner community home page

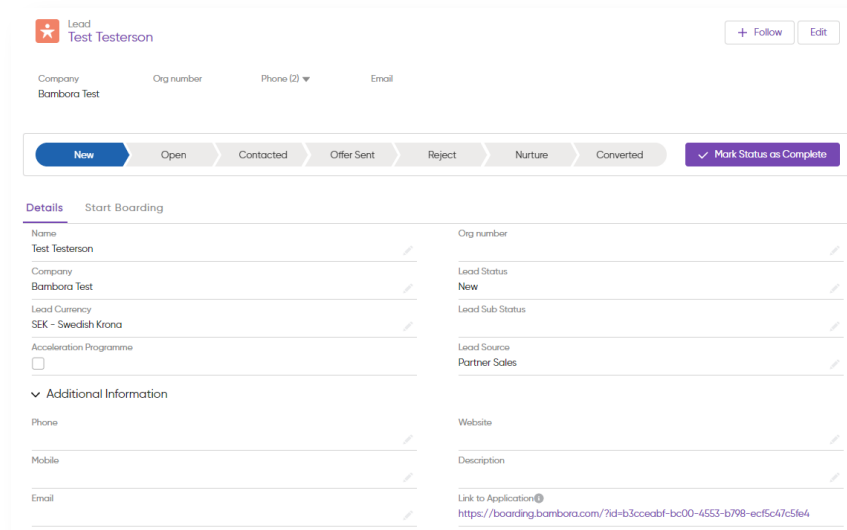
The purpose of the home page is to make it quick and easy for you to find what you need. In the home page you will find an overview of your most recently used objects in the Partner community, such as leads, opportunities and accounts. There is also a feed where you get information about required actions and for instance new releases to the Partner community.



Each object shown on the home page has summarized information related to it. You will find for example the Boarding stage (please find more details in section 5. Opportunities) and the Merchant ID (MID).

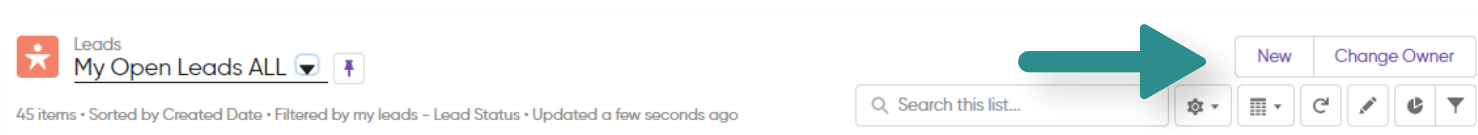
3. Leads

In the leads section you can see your leads and lead information, add new leads and update the status of the leads.

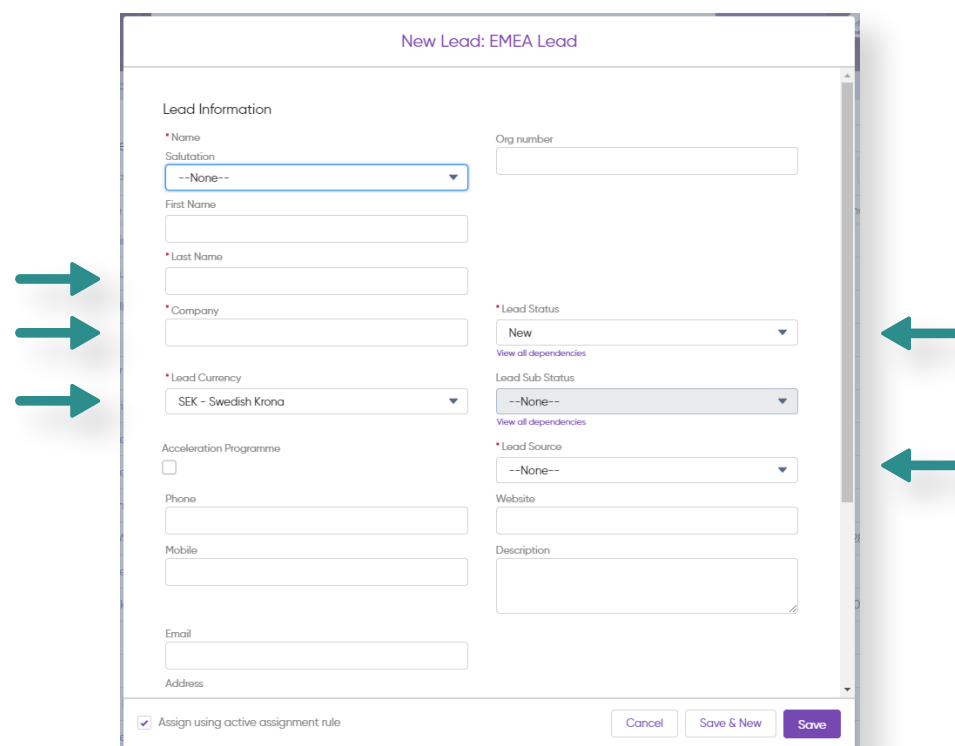


3.1 Create a new lead

To create a new lead, click "New" in the lead section.



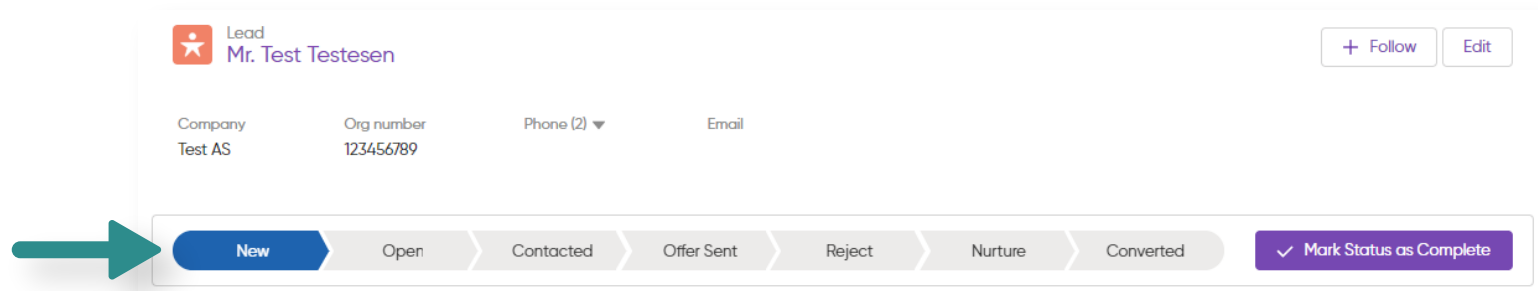
Some fields are required in order to create the lead. They are required as the information is used later in the boarding process and for data management reasons. These fields are marked with an (*).



Please choose only Partner Sales as Lead source.

You will also find fields under the section “Additional information”. This information can help you in the sales process, but is not required when creating a lead or starting the boarding process.

3.2 Lead status



You can update lead status by clicking any stage in the status overview. If you want to change the status of several leads at the same you can tick them and click change owner.



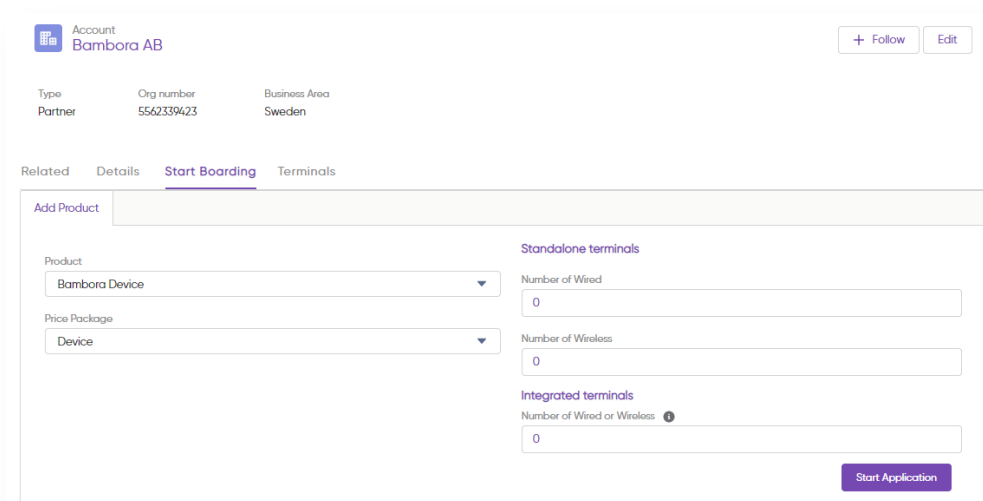
General lead status description (guidance):

- New - Only new contact data for to a merchant
- Open - Attempted to reach out to / contact the merchant
- Contacted - Have spoken to/ been in contact with the merchant
– Successful contact attempt. Lead is work in progress
- Nurture – Lead has described that they are not interested at the moment. They do however take card payments and chances are that they could be interested in the future
- Reject – Lead is not interested and will not be in the future either. Could also be bad contact data or missing contact data
- Qualified – The lead has been converted to an opportunity, which usually is when the lead has been sent an offer

4. Boarding

4.1 Create an application

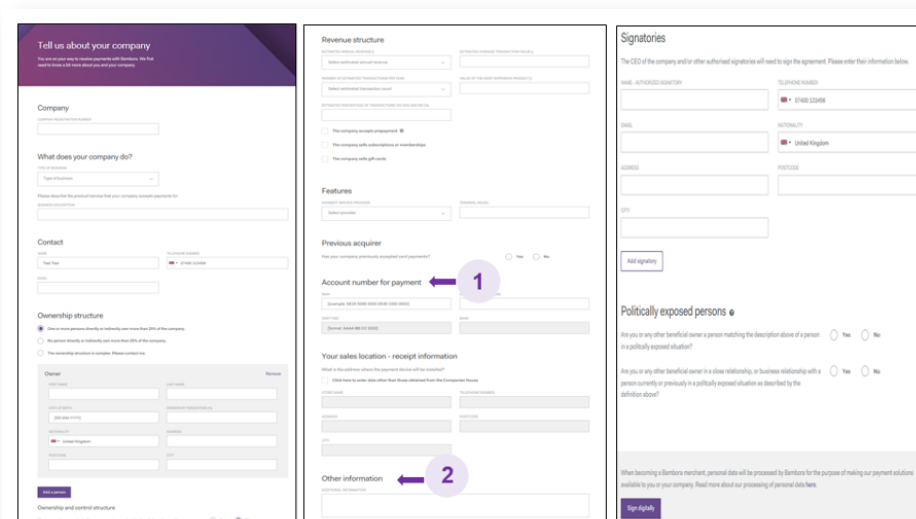
If you are boarding a new customer, the boarding process starts from converting a lead. If it is an existing customer you can start the boarding from the customer's Account, according to description in section 6. Accounts. A lead needs to be created in order to start boarding a new customer. If there is no lead, you have to first create a lead according to section 3.1. Create a new lead.



Once the lead is created and converted you can go to the sheet called Start boarding. In here you fill in the details regarding product(s) and pricing for the application to the boarding. Once you have filled in the details you can press Start application. This will send you to the Online boarding form.

4.2 Online boarding form

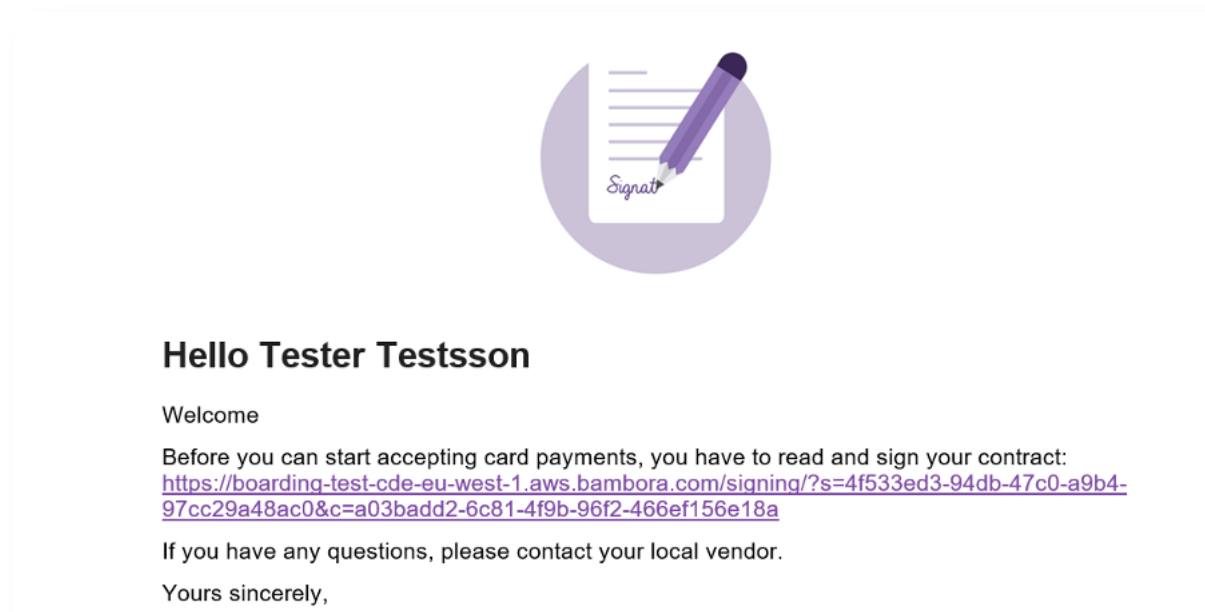
Based on the details in the application from the Partner community an Online boarding process is created. You will be automatically directed to the web page. Please fill in details in respective field. The link is unique for the specific boarding process. If there is a need you can return to the boarding form related to an opportunity. More information about that in section 5. Opportunities.



1. Account number for Payment: We support payments via Faster Payments. Therefore we are able to accept the account number and sort code. In case the merchant does not know the IBAN number, there is a way to calculate it using the site below – then choosing “Calculate an IBAN, then selecting United Kingdom and entering both the sort code and account number.

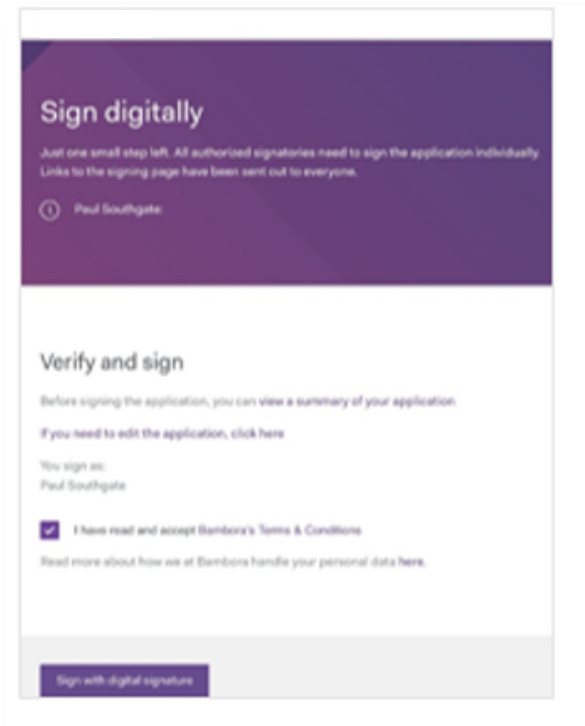
https://www.ibancalculator.com/bic_und_iban.html

The prospective merchant will receive the following email.



The merchant has to click the link to be able to review the contract, Our Terms & Conditions, upload information to and sign digitally.

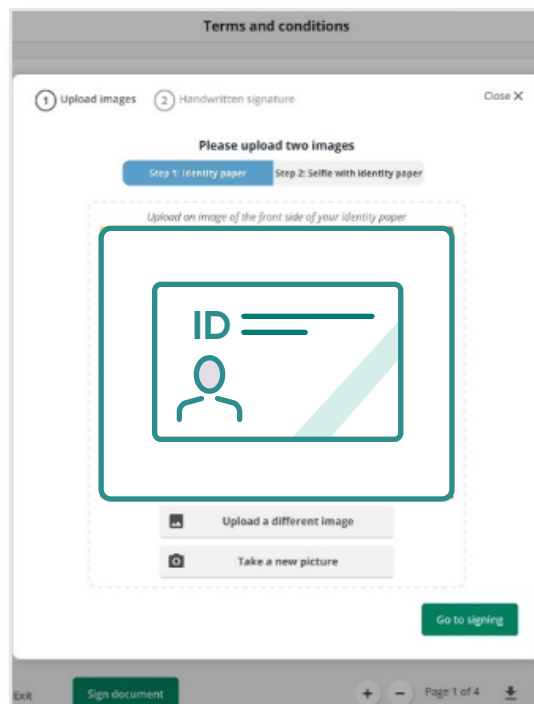
1. View and accept Terms & Conditions



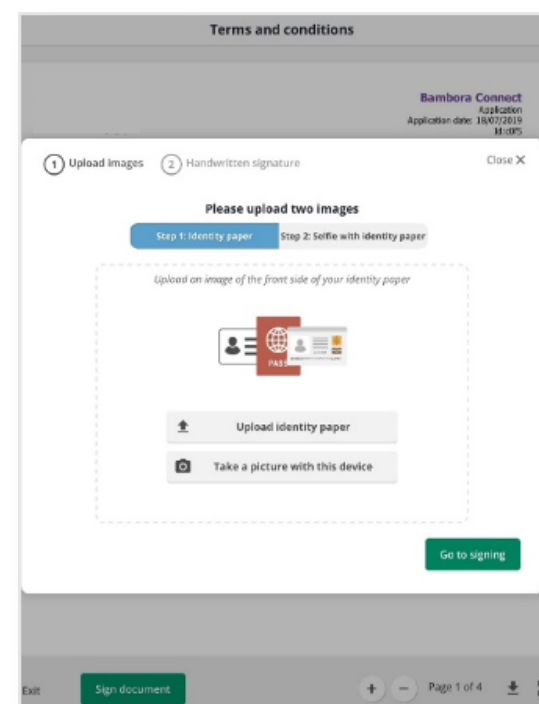
2. Check contract details



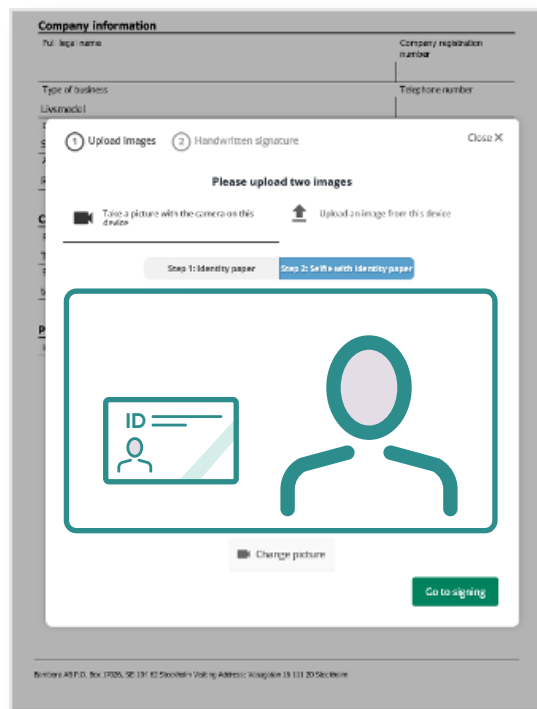
3. Click upload identity paper



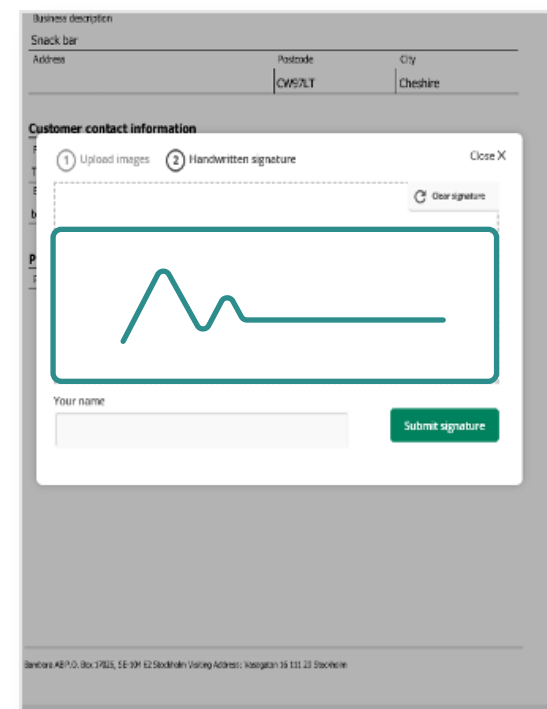
4. Click go to signing



5. Upload selfie with identity paper

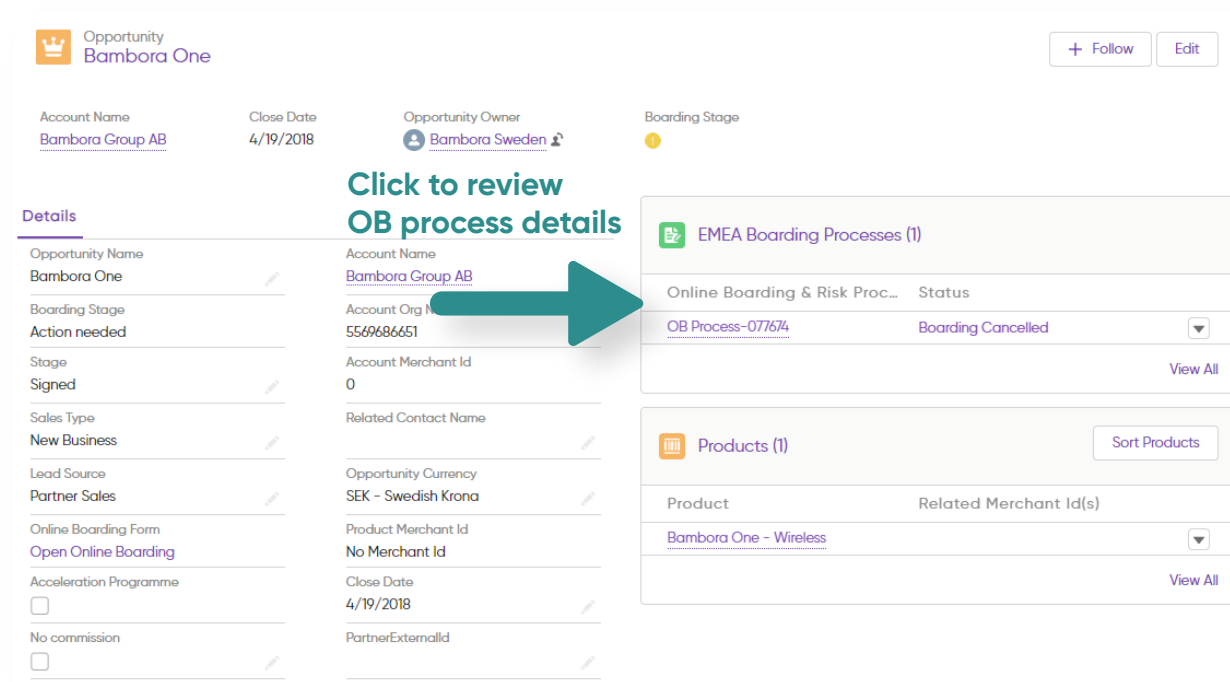


6. Sign with your finger

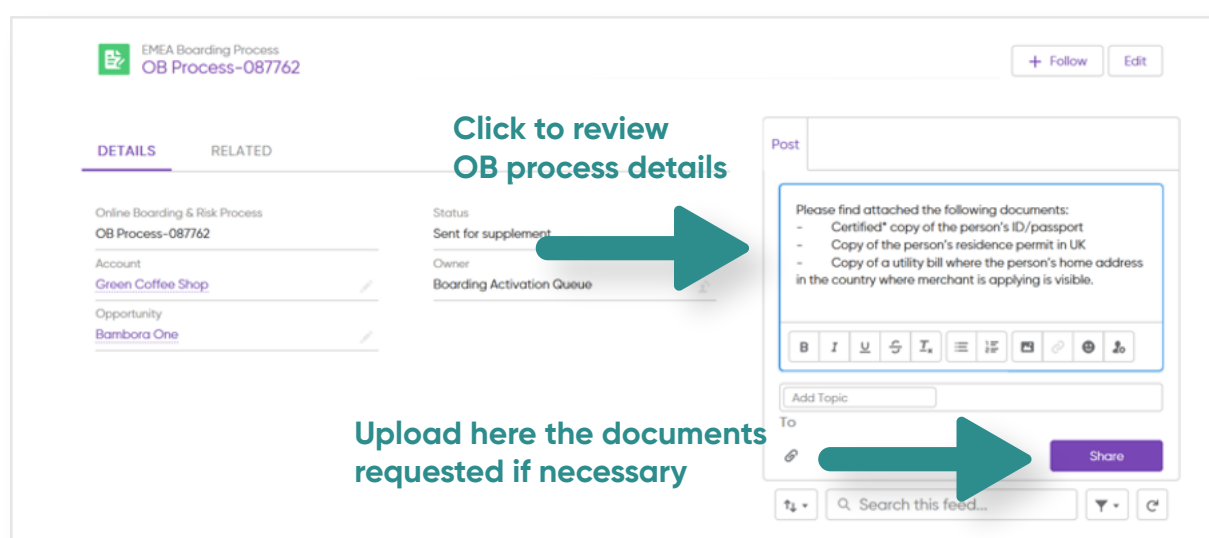


The application is now completed, which means the boarding process is Ongoing and the opportunity is being handled by Worldline's internal boarding processes.

Opportunity & Supplements



To review the details of the Boarding process please click the link as marked to the upper right in image above.



Please use the box on the upper right in the image to post information/upload the documents and then press share.

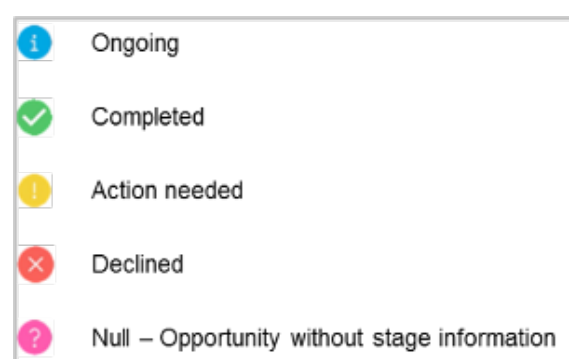
The object Opportunity describes the sales process.






Once the Online boarding form has been filled out and the contract has been sent Opportunity is created. There are several stages in the sales process after the contract has been sent to the customer.

5.1 Boarding stage

The field Boarding stage provides an overview of where in the sales process the opportunity is and if there are any required actions needed from you as partner in order to continue the sales process.

Boarding stage has been given a color code to make it easier for you to see where potential action is needed.



	Ongoing
	Completed
	Action needed
	Declined
	Null – Opportunity without stage information

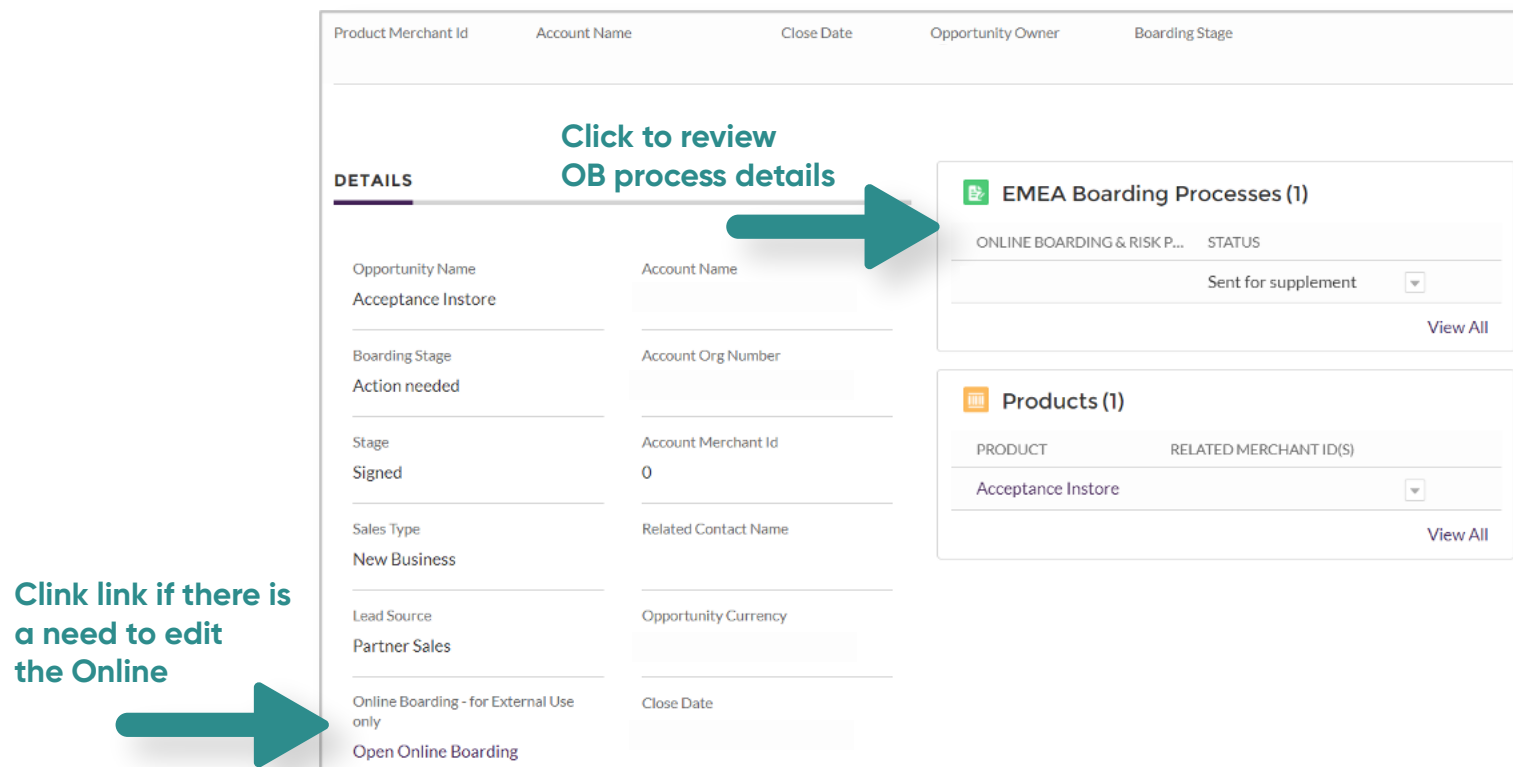
If Boarding stage status is Ongoing, the opportunity is being handled by Worldline's internal boarding processes.

Please note that there can be situations when you as partner need to contact the merchant or add more / update information in the initial application. The Boarding stage would then be in "Action needed" and you will receive a comment that states what information is needed related to the specific opportunity. This could for instance be triggered by Worldline's internal boarding team, when the EMEA Boarding process stage is set to "Sent for supplement" (more information in the section 5.2. In-depth information about boarding process status).

5.2 In-depth information about boarding process status

The status of the boarding process can be followed in detailed by viewing the status field of the EMEA boarding process and the Opportunity Stage.

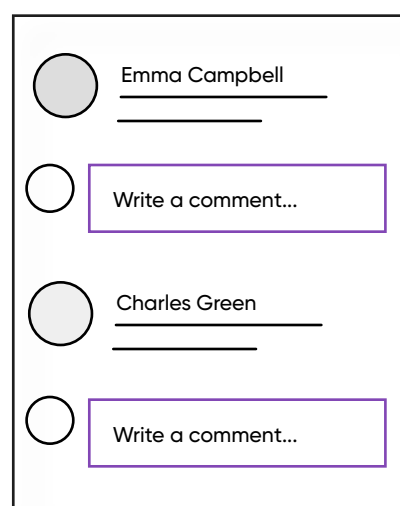
If there is a need to edit information in the Online boarding form, this can be accessed by clicking the link "Open Online boarding". (as described above).



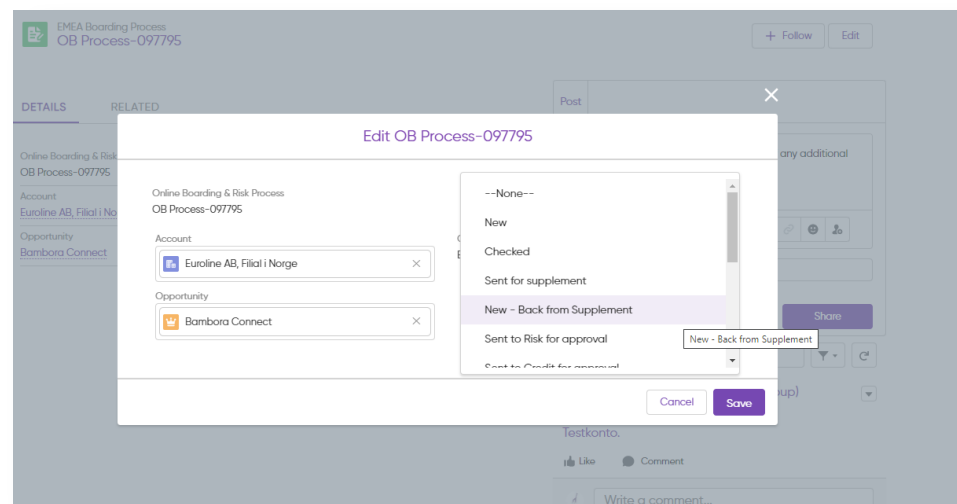
To review the details of the Boarding process please click the link as marked to the upper right in image above.

In the case of Action needed - "Sent for supplement" the partner will be noticed by a Worldline boarding representative what further information / action is required.

A conversation regarding the boarding can be held here directly between the partner and the Worldline boarding representative.



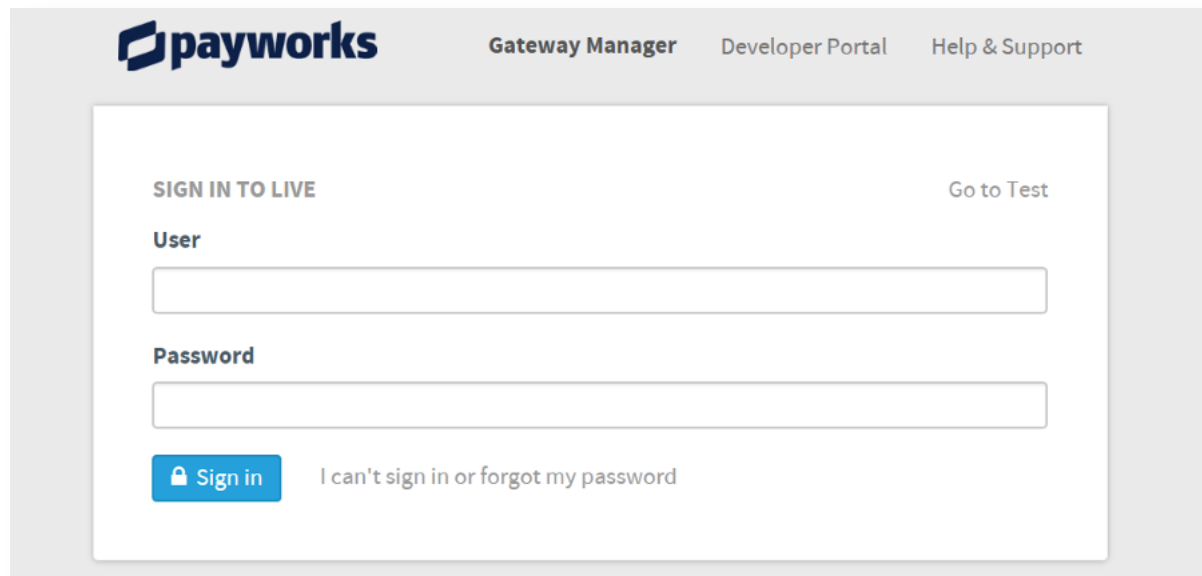
Once required actions have been taken by the partner the partner must update the status of the boarding process to New – Back from Supplement. Click Edit in the OB process details view as marked by the arrow below, and choose the status.



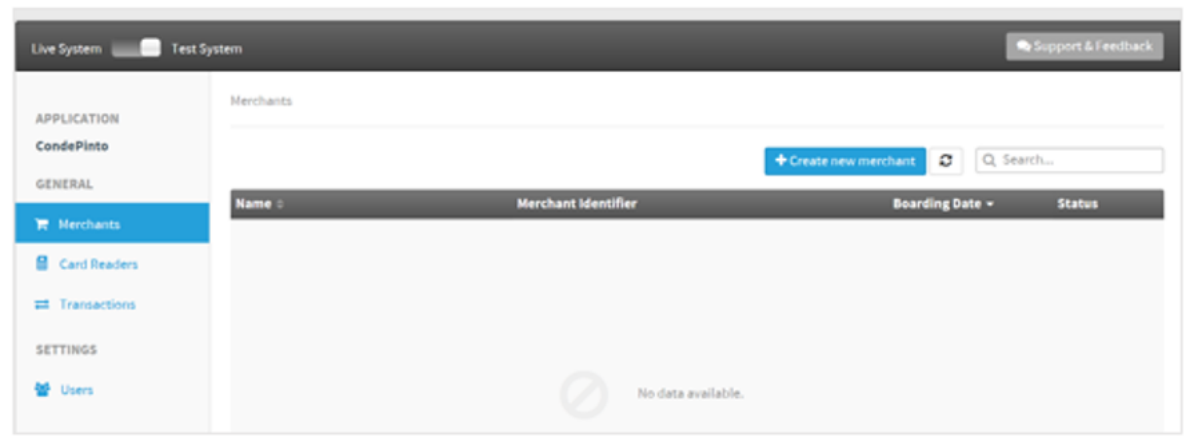
5.3 How to add a MID from Worldline Partner community to Payworks Gateway

Please access the link <https://api.payworks.io/uis/mngr/#/login> and use your login details. The username to log in is your email address. If you do not remember your password please click

“I can’t sign in or forgot my password” in order reset your password.



Once you are logged in, you will have to create a merchant account. To create a merchant account, click “Create new merchant” highlighted in blue.



You have now to fill out the “Merchant Name” and “Receipt Information” sections using the same merchant’s details provided in the Worldline Partner Community.

Then you have to go to “Attach processing” section and add the currencies requested by the merchants and add the MID allocated to this specific merchant in the Worldline Partner Community and then click “Attach processing path” highlighted in blue.

PROCESSING PATHS Attach processing path

Institute	Terminal IDs	Schemes	Currencies	Status	Actions
No processing paths attached yet. Attach a processing path.					

Attach processing path

Clearing Institute*

Schemes*

Currencies*

Merchant ID*

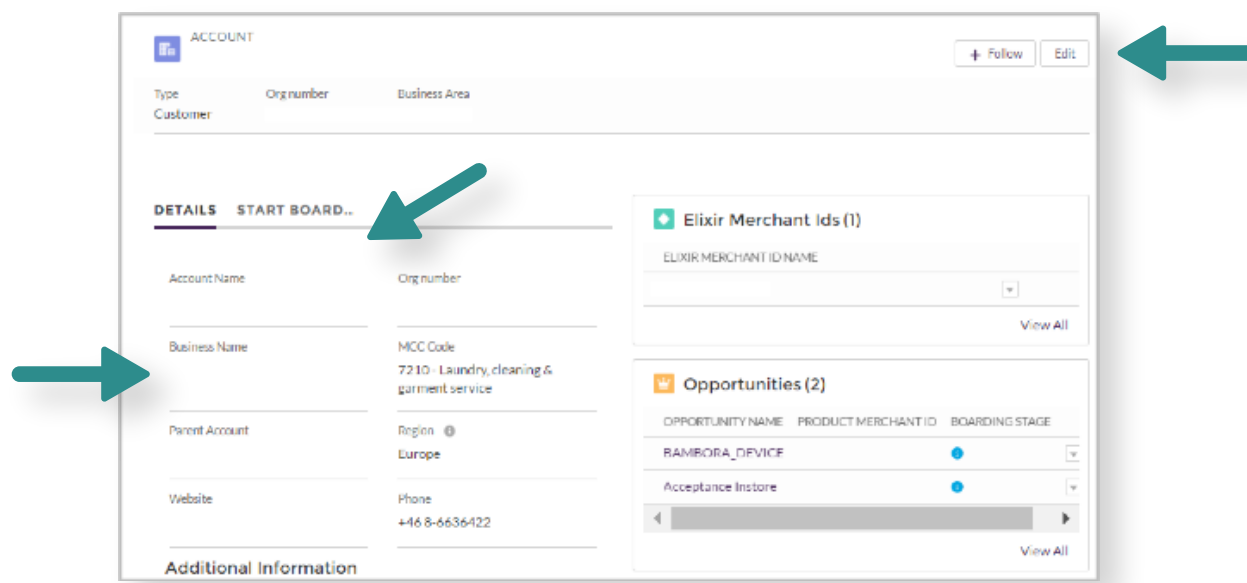
Payment facilitator.

Now that the boarding process has been completed and the merchant is ready to start taking transactions.

6. Updating and new sales for existing merchants

The object Account stores relevant information about customers. Some examples of related objects are Opportunities, Products and Contacts.

To the right in the overview you can see all merchant's Merchant IDs as well as Opportunities.



You can edit information related to the Account by clicking Edit in the upper right corner. If there is an existing Account that you as partner want to board additional product(s) to, you can start the application directly from the account. A new opportunity will then be added to the account.

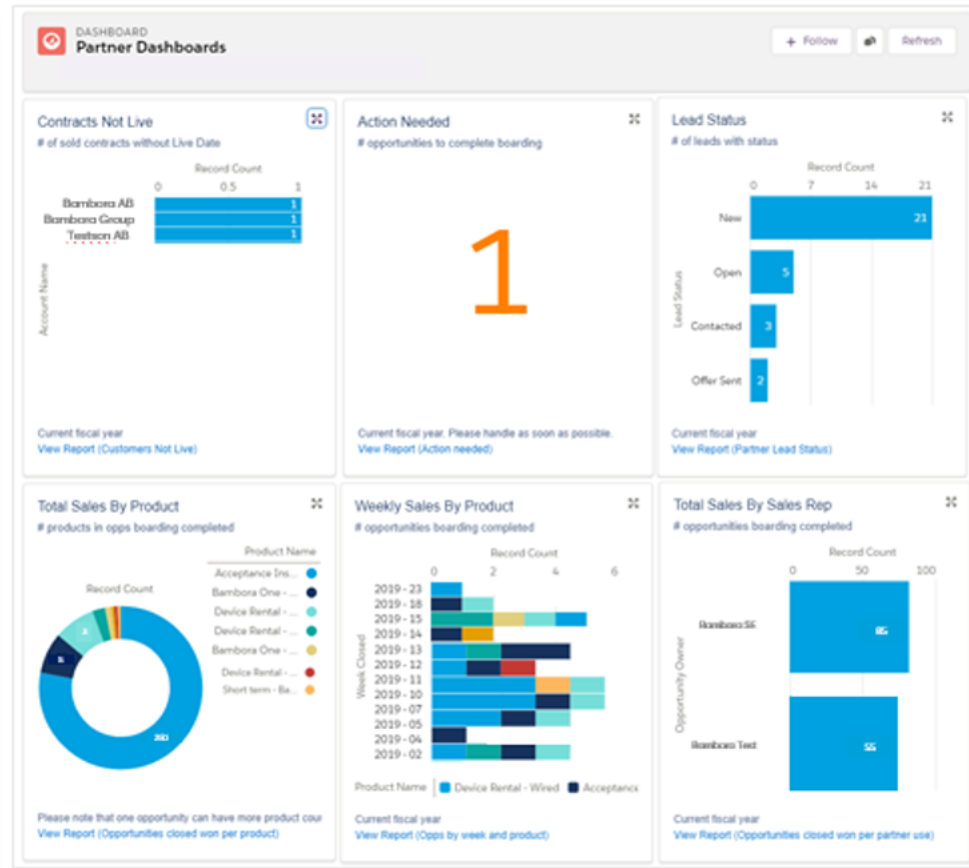
If there is not already an account boarding has to be started from the lead (please see section 3.1 and 4.1)

The field Business name can be used to make custom name descriptions of an account.

7. Dashboards



7.1 Dashboards – Overview



Data source:

Customized reports in Salesforce

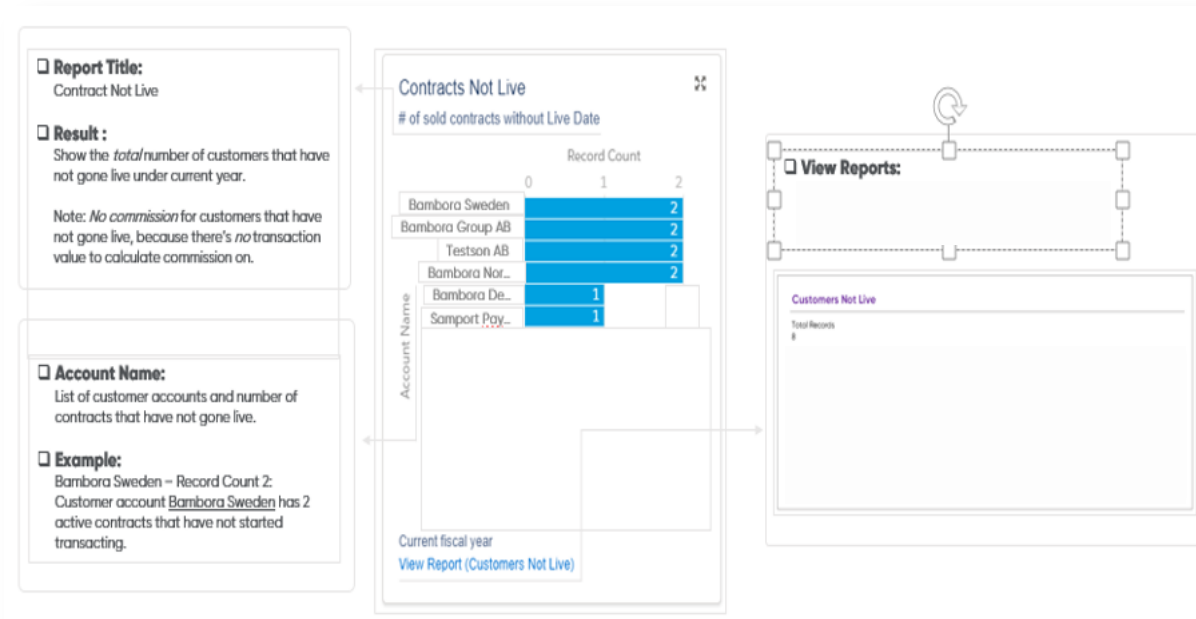
• Availability:

Shared with ALL active Community users

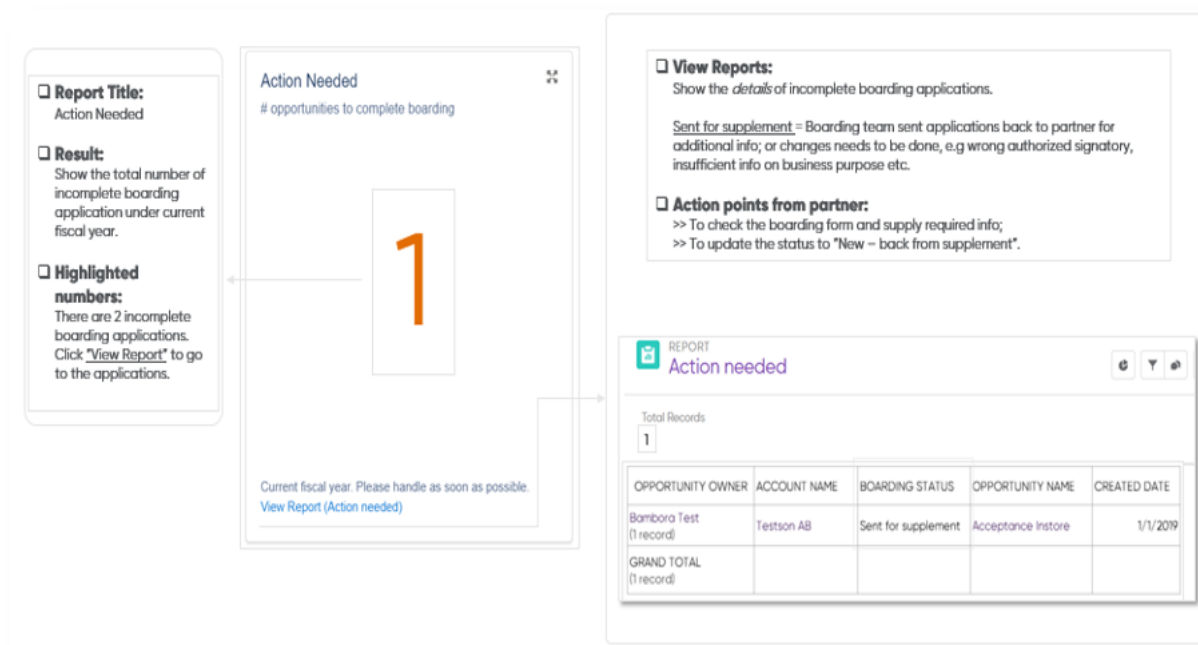
• Type of reports:

1. Contracts Not Live
2. Action Needed
3. Lead Status
4. Total Sales By Product
5. Weekly Sales By Product
6. Total Sales By Sales Rep

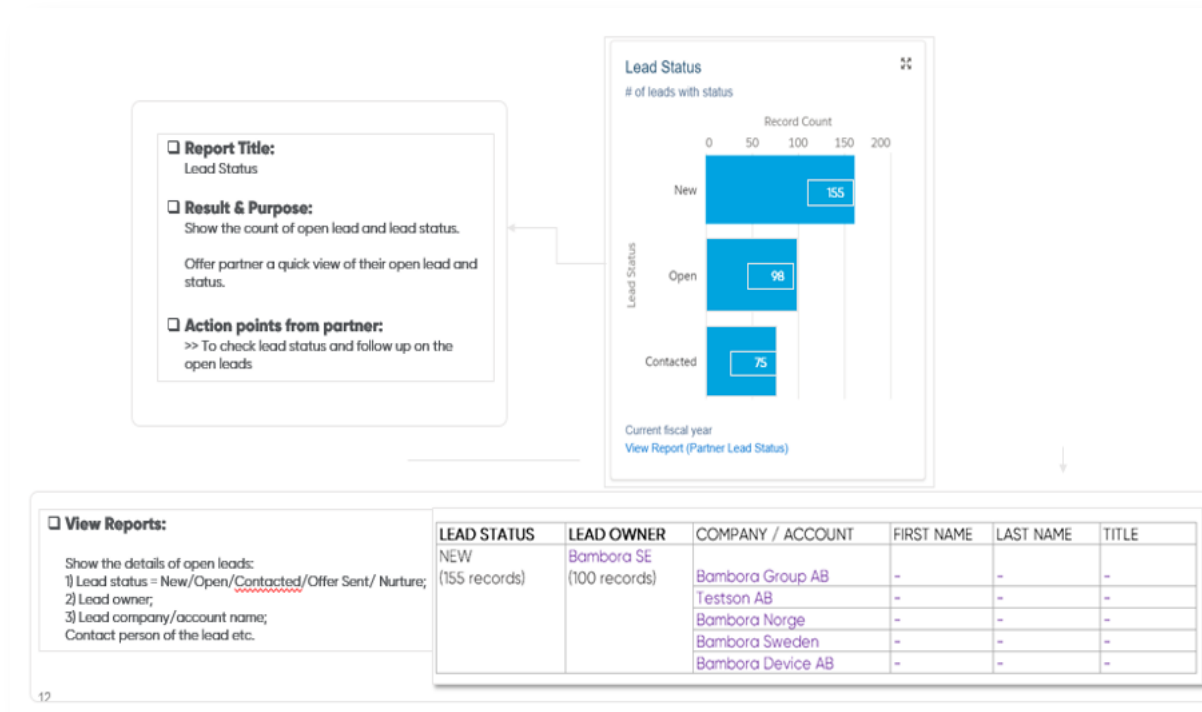
7.2 Dashboards – Contacts Not Live



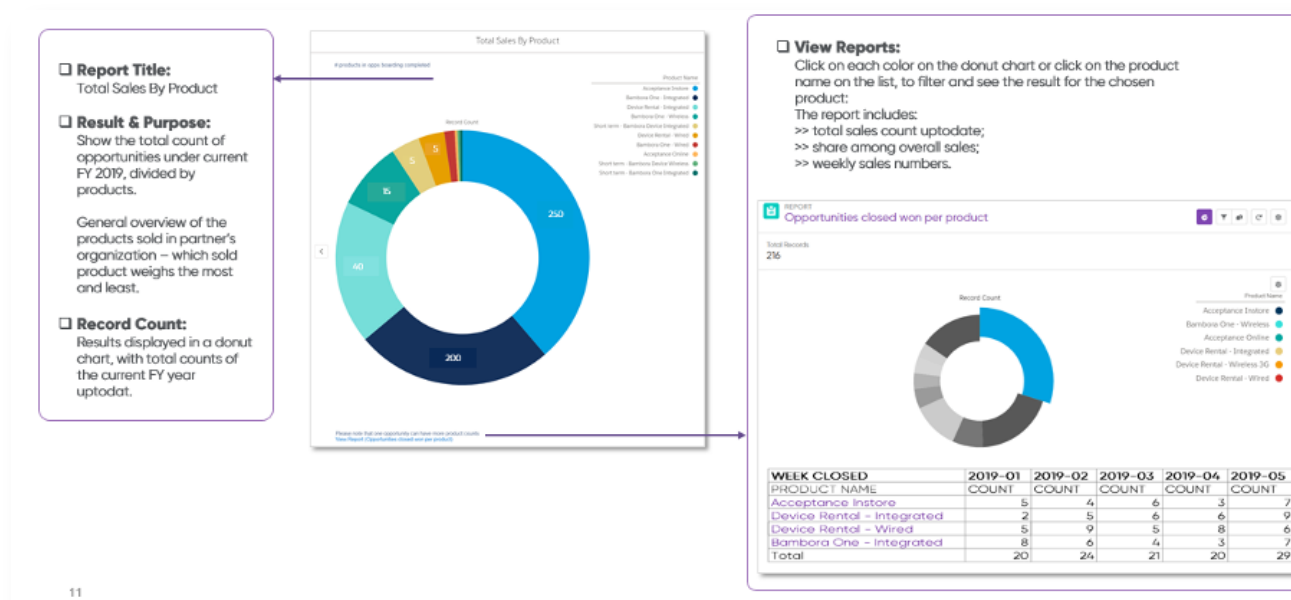
7.3 Dashboards – Action Needed



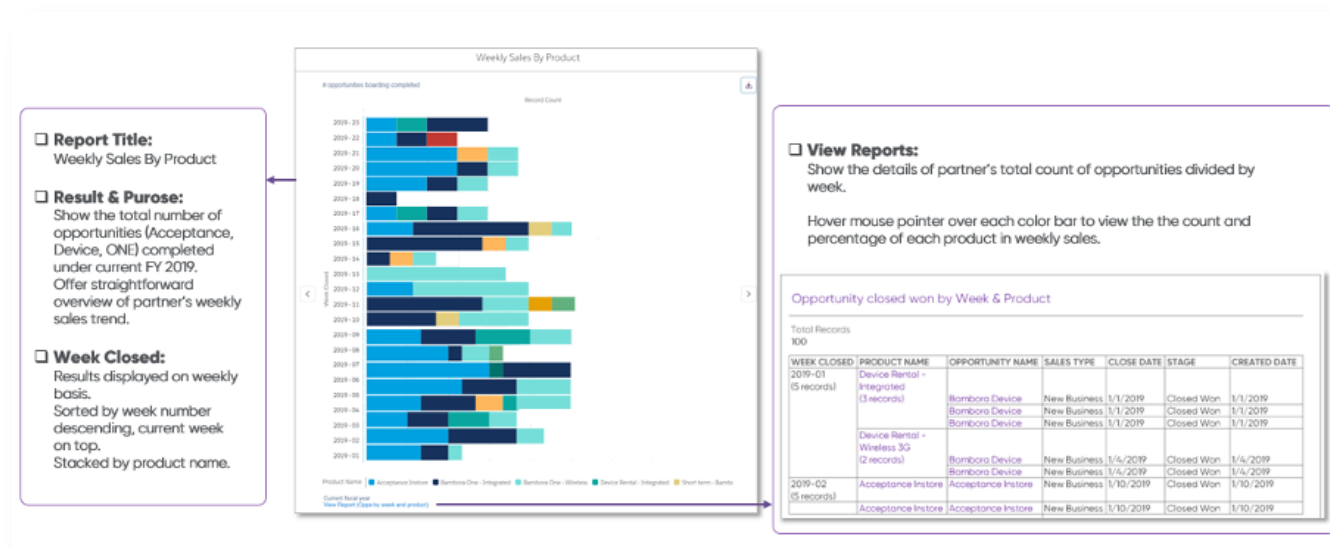
7.4 Dashboards – Lead Status



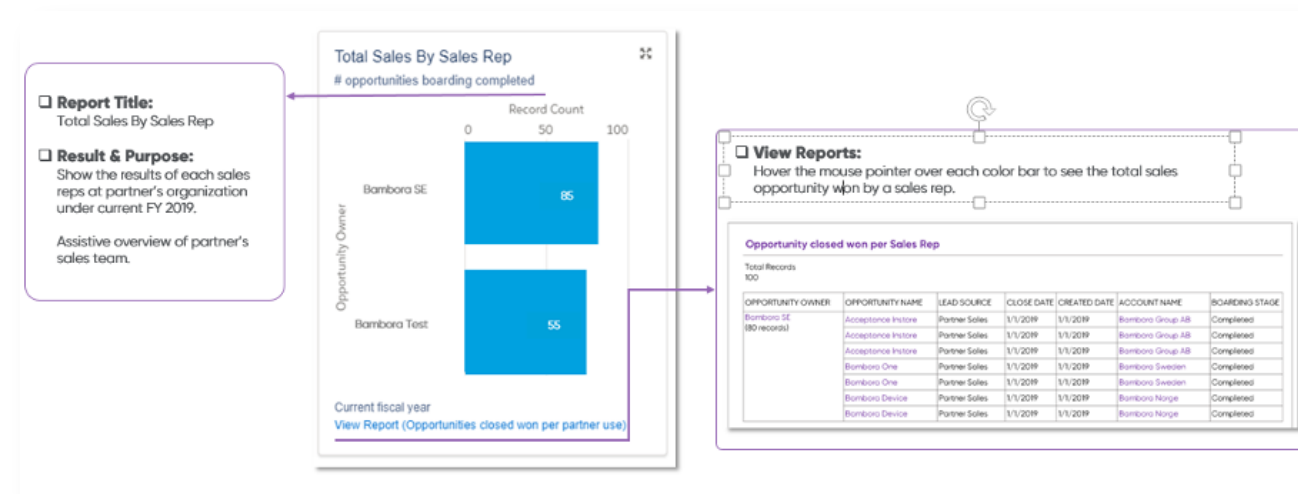
7.5 Dashboards – Total Sales by Product



7.6 Dashboards – Weekly Sales by Product



7.7 Dashboards – Action Needed



8. Reports



8.1 Reports – Overview

Available reports are categorized in 4 major types.

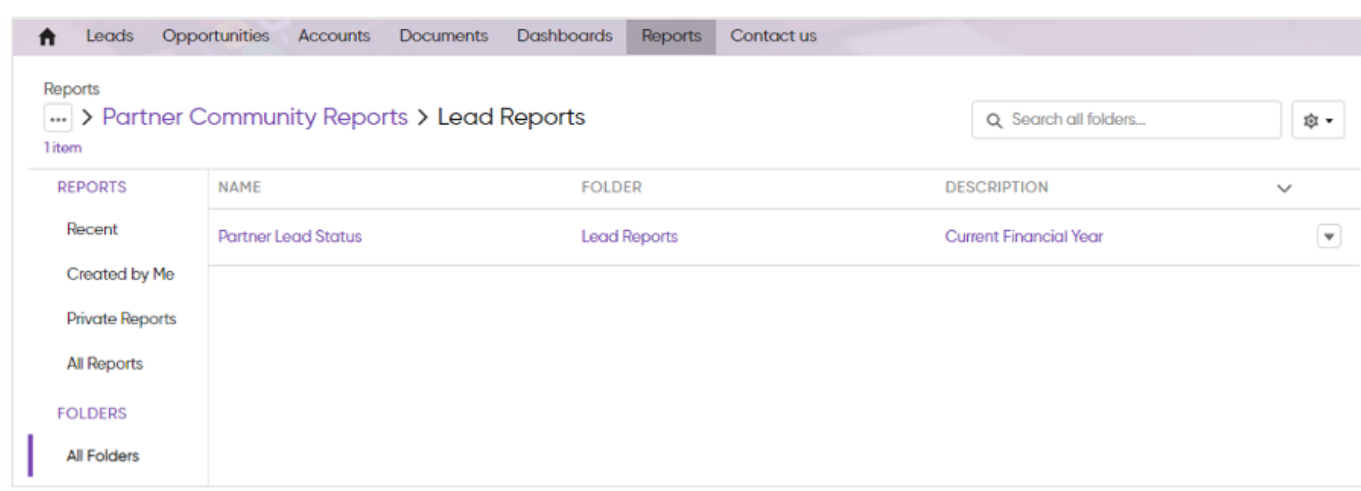
1. Opportunity Reports
2. Lead Reports
3. Boarding Reports
4. Account Reports

REPORTS	NAME	FOLDER	DESCRIPTION	
Recent	Opportunity Reports	Partner Community Reports		▼
Created by Me	Lead Reports	Partner Community Reports		▼
Private Reports	Boarding Reports	Partner Community Reports		▼
All Reports	Account Reports	Partner Community Reports		▼

8.2 Reports – Boarding reports

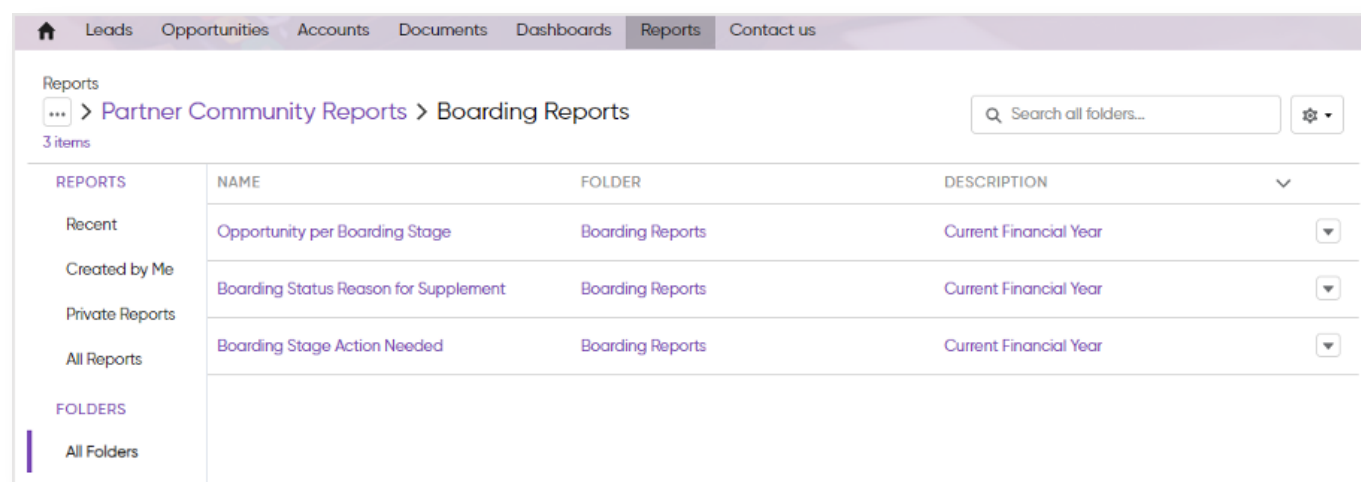
REPORTS	NAME	FOLDER	DESCRIPTION	
Recent	Opportunity closed won per Product	Opportunity Reports	Current Financial Year	▼
Created by Me	Opportunity closed won per Sales Rep	Opportunity Reports	Current Financial Year	▼
Private Reports	Opportunity closed won by Week & Product	Opportunity Reports	Current Financial Year	▼
All Reports	Opportunity Ongoing	Opportunity Reports	Current Financial Year	▼
FOLDERS	Opportunity Completed	Opportunity Reports	Current Financial Year	▼

8.3 Reports – Lead reports



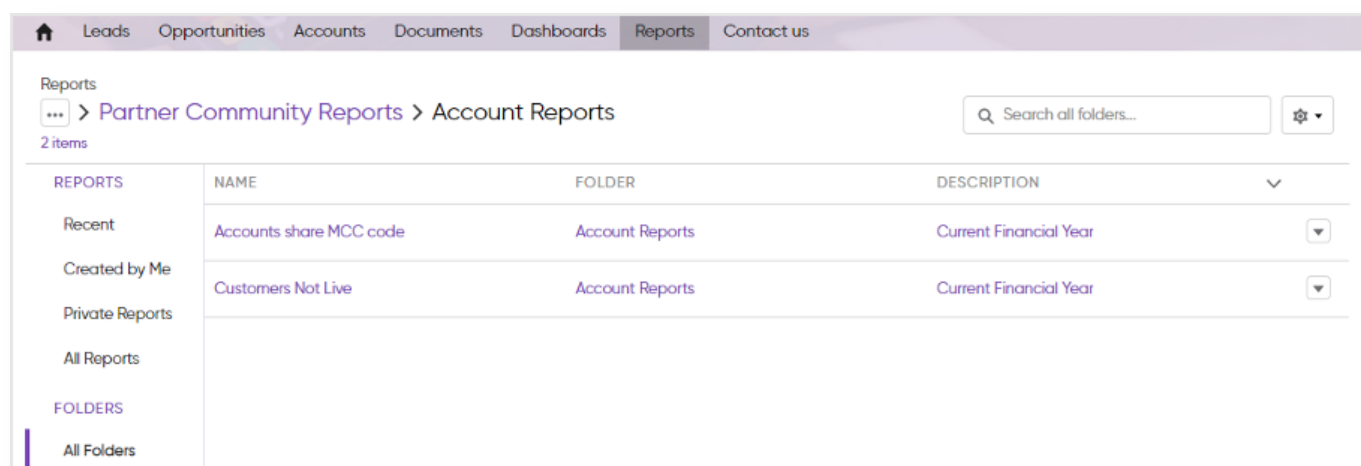
REPORTS	NAME	FOLDER	DESCRIPTION
Recent	Partner Lead Status	Lead Reports	Current Financial Year

8.4 Reports – Boarding reports



REPORTS	NAME	FOLDER	DESCRIPTION
Recent	Opportunity per Boarding Stage	Boarding Reports	Current Financial Year
Created by Me	Boarding Status Reason for Supplement	Boarding Reports	Current Financial Year
Private Reports	Boarding Stage Action Needed	Boarding Reports	Current Financial Year

8.5 Reports – Account reports



REPORTS	NAME	FOLDER	DESCRIPTION
Recent	Accounts share MCC code	Account Reports	Current Financial Year
Created by Me	Customers Not Live	Account Reports	Current Financial Year

Contacts

**Any Questions?
Please contact Partner Service:**

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Phone: +44 203 455 0381**

WORLDLINE 