



 **SwipeSimple**

Product and Partnership Overview

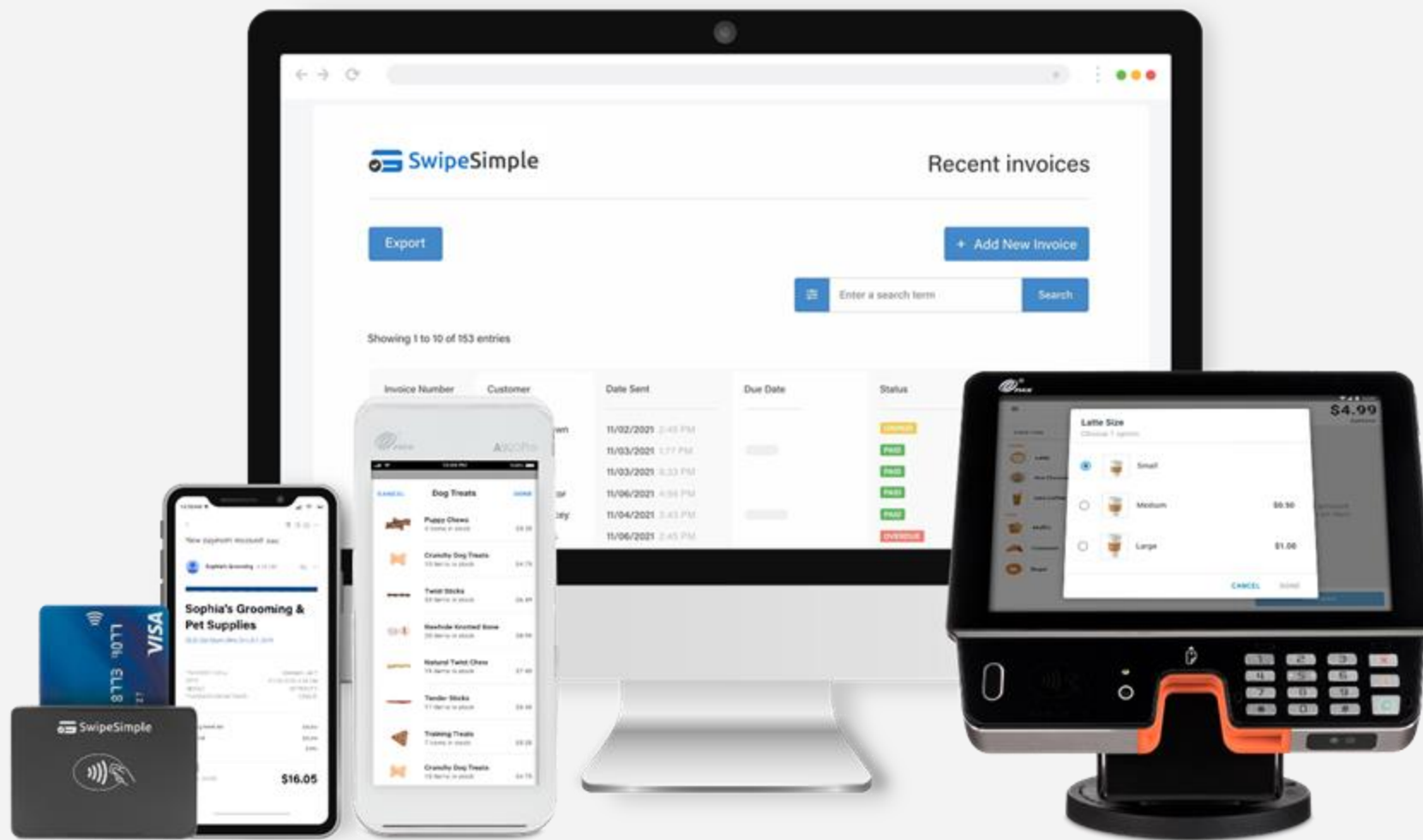
One-stop Solution for Small Business Merchants



Agenda

- Growing your Merchant Base:
 - What small business merchants need
 - What SwipeSimple delivers
- Feature Highlights & Demo
- Finding Your Perfect Merchants
- Q&A
- Match the Merchant Quiz

Why Partner with CardFlight



Trusted by more than

125,000

merchants

- The best product to grow your merchant portfolio

Reliability - 99.995% uptime

Popularity - average NPS score of 50 year-over-year

- Processor agnostic

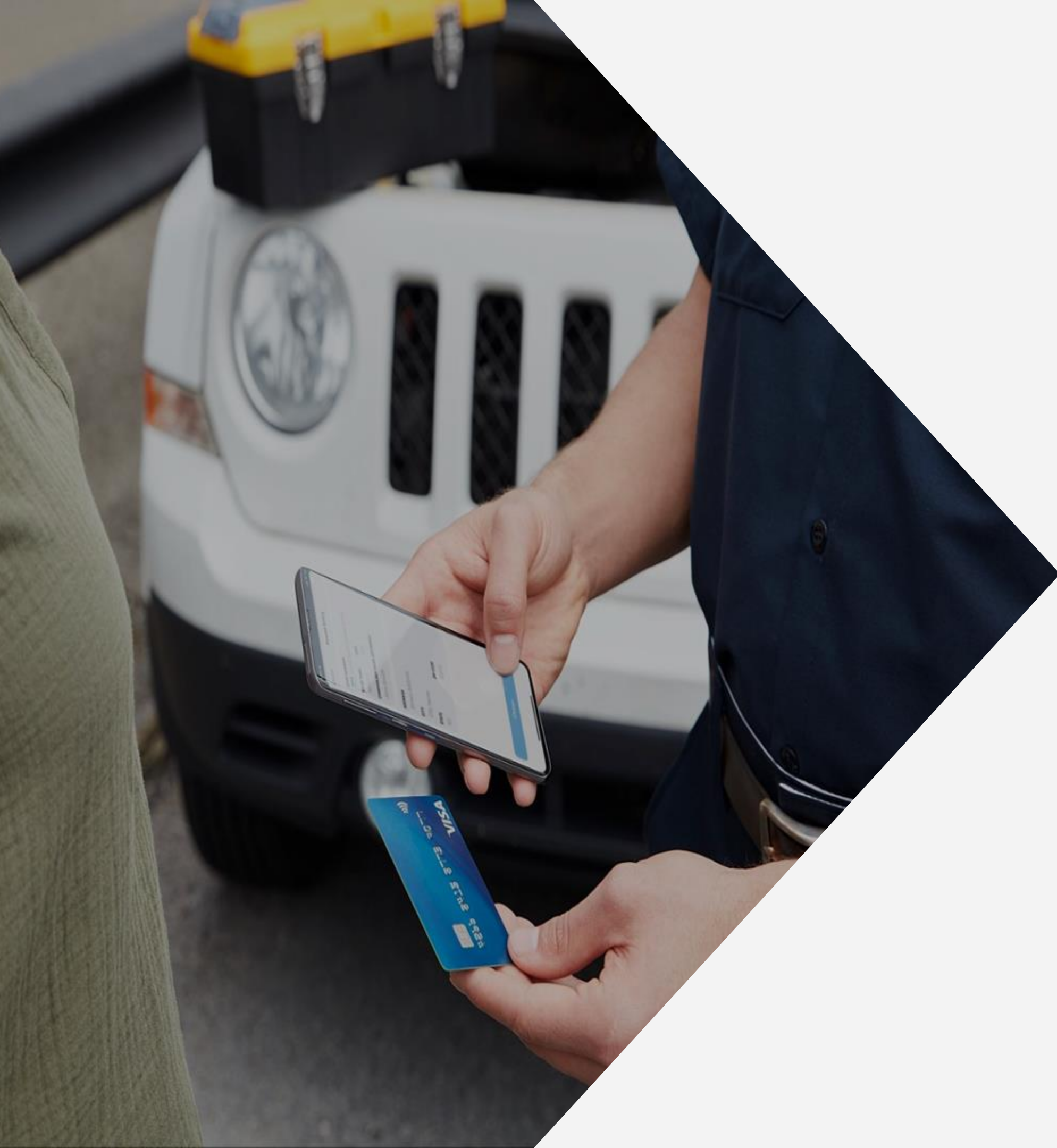
Multiple processor supported - Fiserv, TSYS and Worldpay

- We are committed to your selling success

Demo videos, sales collateral, and online support center to help your team close sales and get questions answered 24/7/365

- Customer Support to backup your team

Real humans who understand the product and are available to your team - with



Solution Overview

One-stop Solution for Small Business Merchants



SwipeSimple Payments

Accept payments on a phone, tablet, or computer with our gateway product



SwipeSimple Terminal

The all-in-one credit card device for counter, booth, and window payments



SwipeSimple Register

The easy-to-use POS system packed with time-saving features

Snapshot of Robust Features

All SwipeSimple Software Packages include:

- Accept credit charges
- Digital receipts
- Discounts
- Inventory management
- Automatic batch management
- Batch reports

Additional features in SwipeSimple Payments

- Save card on file
- Virtual Terminal
- Invoices from Web & Mobile
- Scheduled payments
- Payment Links
- Bluetooth peripherals
- Support for Level II and Level III Interchange Qualification

Additional features in SwipeSimple Terminal

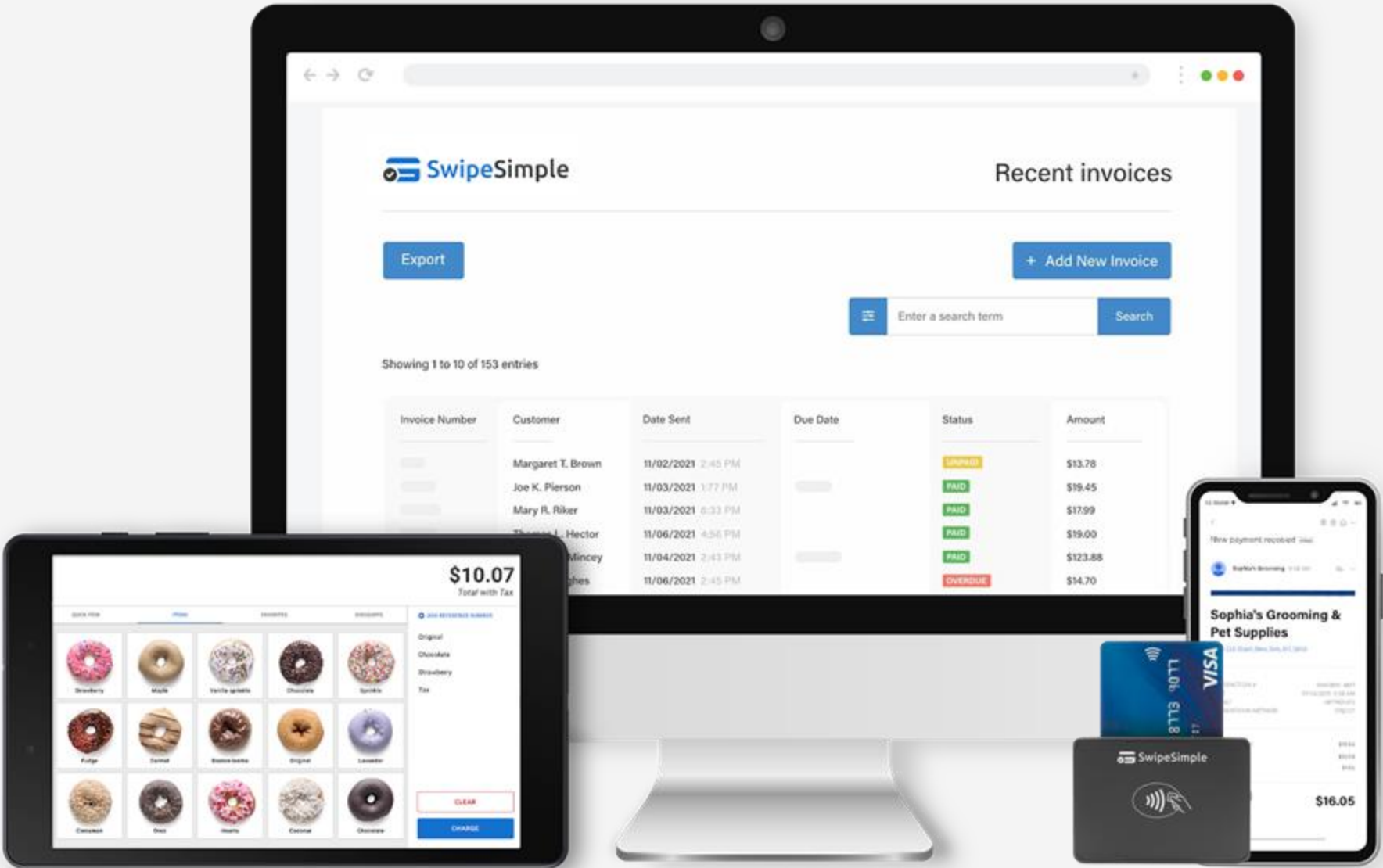
- Post-Auth Tip Adjust
- Accept debit charges
- Smart terminal hardware

Additional features in SwipeSimple Register

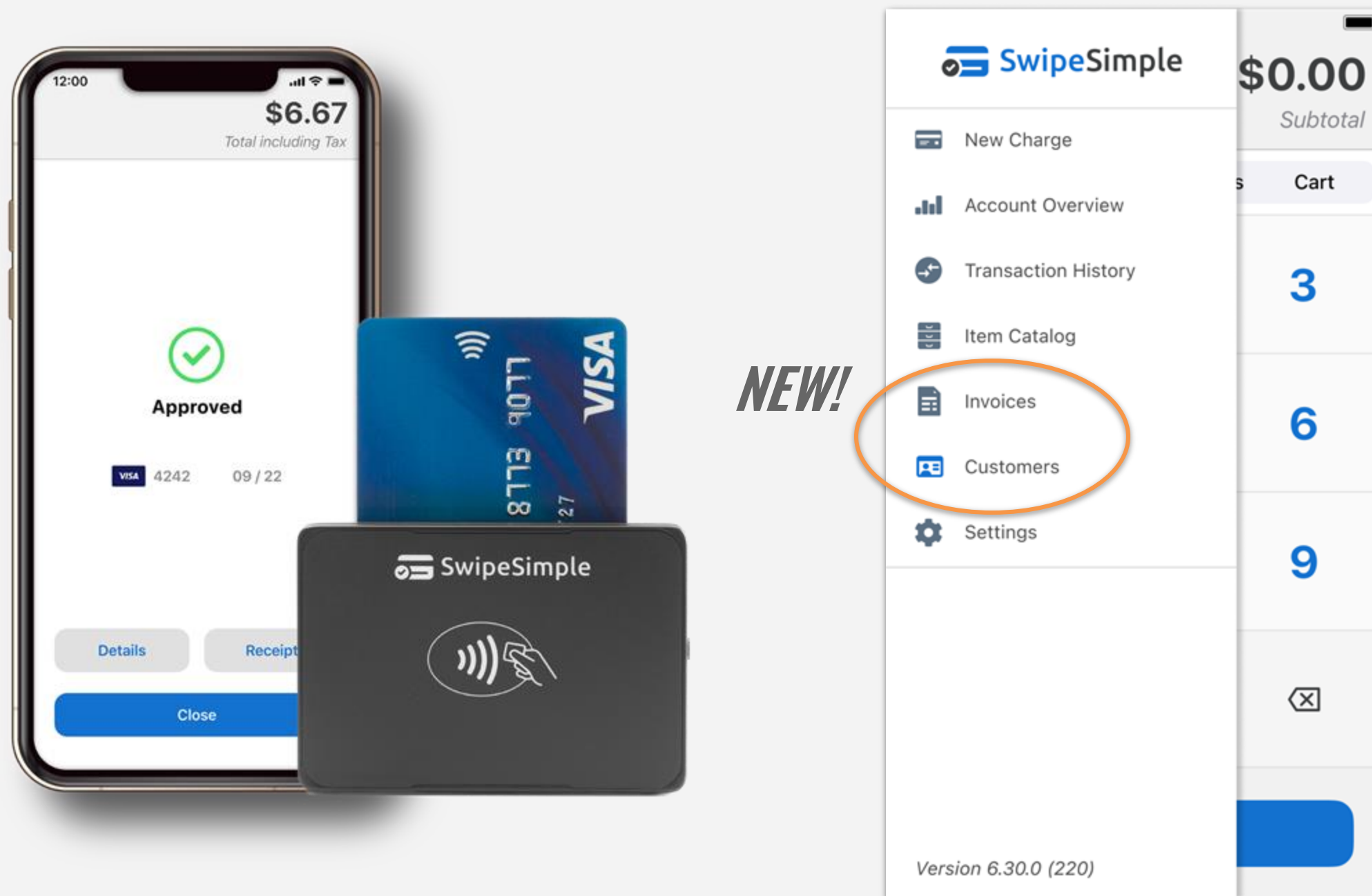
- Post-Auth Tip Adjust
- Accept debit charges
- Item-Level tax rates
- Item Modifiers
- USB peripherals (Cash drawer and Printers)
- POS capabilities

SwipeSimple Payments

Mobile & Gateway



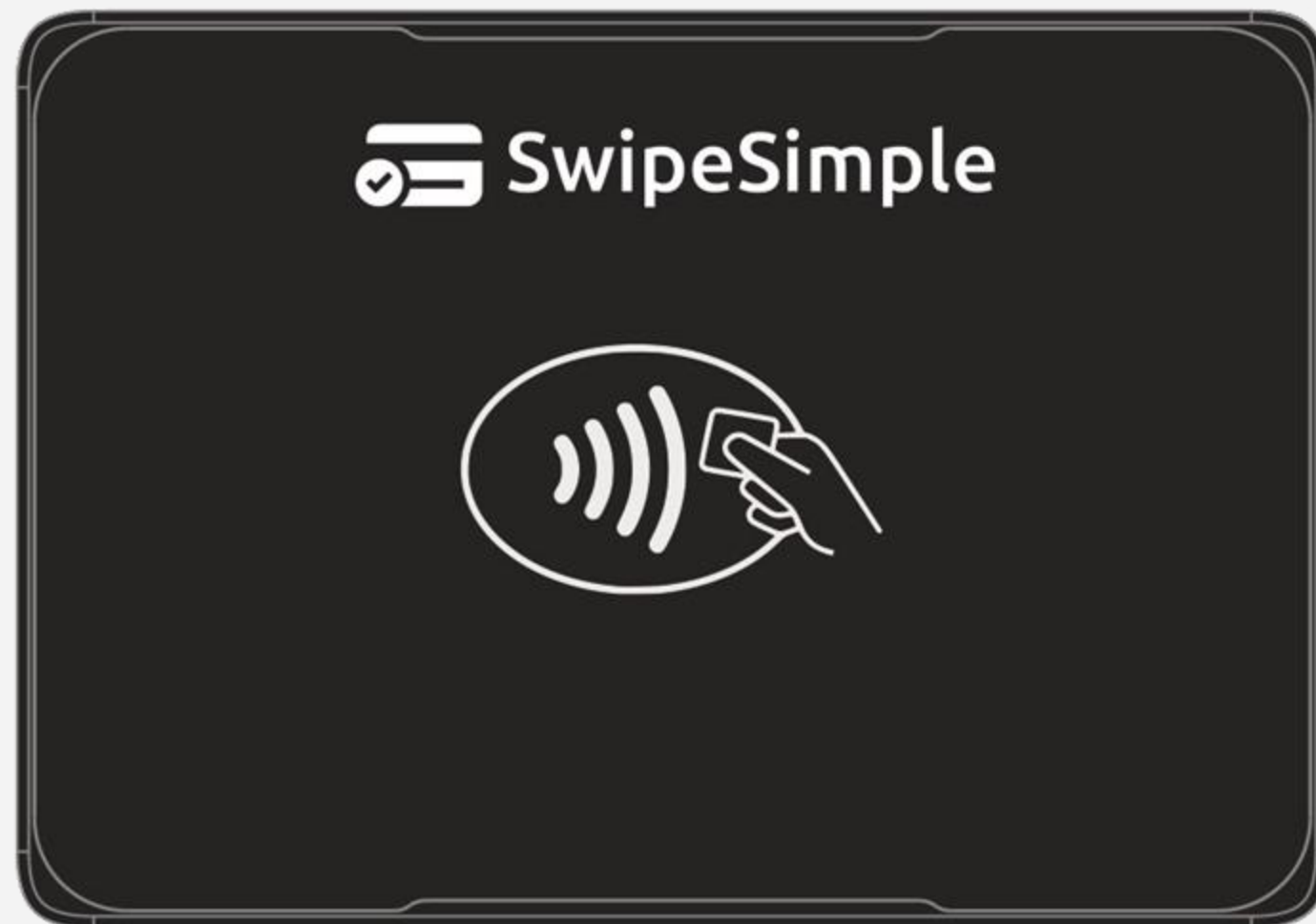
SwipeSimple Mobile App



- Accept payments anywhere
The power of a payment system on the merchant's own mobile device. Easily pairs with bluetooth card reader for card-present transactions.
- Advanced features on the go
Create and send invoices, and charge to saved card on file right from the Mobile App.
- Inventory management
Item Catalog helps to instantly ring up the most popular items.
- Customize for any business
Settings for tips, taxes, signature prompts, and more are easily customizable to help any business.

B350 Card Reader

NEW!



- Contactless NFC payments
Including Apple Pay and Google Pay

- EMV Quick Chip
Built-in EMV Quick Chip speeds up
chip card transaction times

- MSR
Magnetic stripe reader lets you
swipe any credit or debit card

- Long battery life
Holds a charge for up to 500 EMV
transactions

SwipeSimple Virtual Terminal

- Accept Payments on a Computer Virtual Terminal, Card-on-File, Scheduled & Recurring Payments, and support for Level II & Level III Interchange rates.
- Create and send invoices & Digital Payment Links (Hosted Payment pages) to collect payment online.
- Customize for specific businesses
Create Discounts, customize tax rates, determine prompts for tips, or create optional reference number, to support any payment.

The screenshot shows the SwipeSimple Virtual Terminal interface. At the top left is the SwipeSimple logo, and at the top right is the text 'Virtual Terminal'. Below the logo is a 'New Transaction' section with a dropdown menu showing 'Sophia's Grooming & Pet Sup...'. The 'Payment Method: Card' is selected, with a link to 'Record Cash Payment'. Below this is a 'Select Customer' link. The 'Cardholder Name' field contains 'John Doe', and there is a checkbox for 'Save card for later use'. The 'Credit Card Number' field shows a Visa card number '4111 1111 1111 1111' with a green checkmark. The 'Expiration Date' field shows '11 / 23' with a green checkmark. The 'CVV' field shows '123'. Below these fields are expandable sections for 'Address', 'Reference Number', 'Line Items', 'Discounts', and 'Automatic Adjustments'. The 'Automatic Adjustments' section is expanded, showing an 'Adjustment' of 4.00% resulting in \$0.20. The 'Amount' field shows '\$ 5.00' and the 'Tax' field shows 'Tax Rate (10%)'. At the bottom, a summary table shows: Subtotal \$5.00, Adjustment \$0.20, Tax \$0.52, and TOTAL \$5.72. A blue button labeled 'Charge \$5.72' is next to the summary.

Field	Value
Cardholder Name	John Doe
Credit Card Number	4111 1111 1111 1111
Expiration Date	11 / 23
CVV	123
Amount	\$ 5.00
Tax Rate	10%
Subtotal	\$5.00
Adjustment	\$0.20
Tax	\$0.52
TOTAL	\$5.72

Scheduled Payments

SwipeSimple

Scheduled Payments

Export

Add New Scheduled Payment

Enter a search term

Search

Showing 1 to 10 of 128 entries (filtered from 3,041 total entries)

Print table

Configure table view

DESCRIPTION	CUSTOMER	DATE	AMOUNT	TYPE	FREQUENCY	COUNT
Lawn Care	Alexis Brown	04/29/2021	\$30.00	Subscription	Weekly	82
test	Alexis Brown	04/29/2021	\$0.01	Subscription	Weekly	2
Coffee subscription	Alexis Brown	04/29/2021	\$21.00	Subscription	Weekly	11
test	Alexis Brown	04/29/2021	\$0.01	Subscription	Weekly	2
test	Alexis Brown	04/29/2021	\$0.01	Subscription	Weekly	2
Eyebrow Threading	Alexis Brown	04/29/2021	\$21.00	Subscription	Monthly	9
Hair Dye	Susan Demo	04/30/2021	\$75.00	Subscription	Quarterly	11
Eyebrow Threading	Alexis Brown	04/30/2021	\$21.00	Subscription	Monthly	21
Eyebrow Threading	Alexis Brown	04/30/2021	\$21.00	Subscription	Monthly	21
Hair Sub Box	Alexis Brown	04/30/2021	\$25.00	Subscription	Monthly	30

Show 10 entries per page

Previous

1

2

3

4

5

...

13

Next

- Recurring billing
Bill customers automatically by scheduling weekly, monthly, or yearly payments.
- Simplify large purchases
Set a future date for one-time payments to process automatically.
- Offer subscription options with automated billing for continuous services.

Payment Links- Hosted Payment Page

- 'Buy now' button

Put a "buy now" button on any website. No special software or plugins needed.

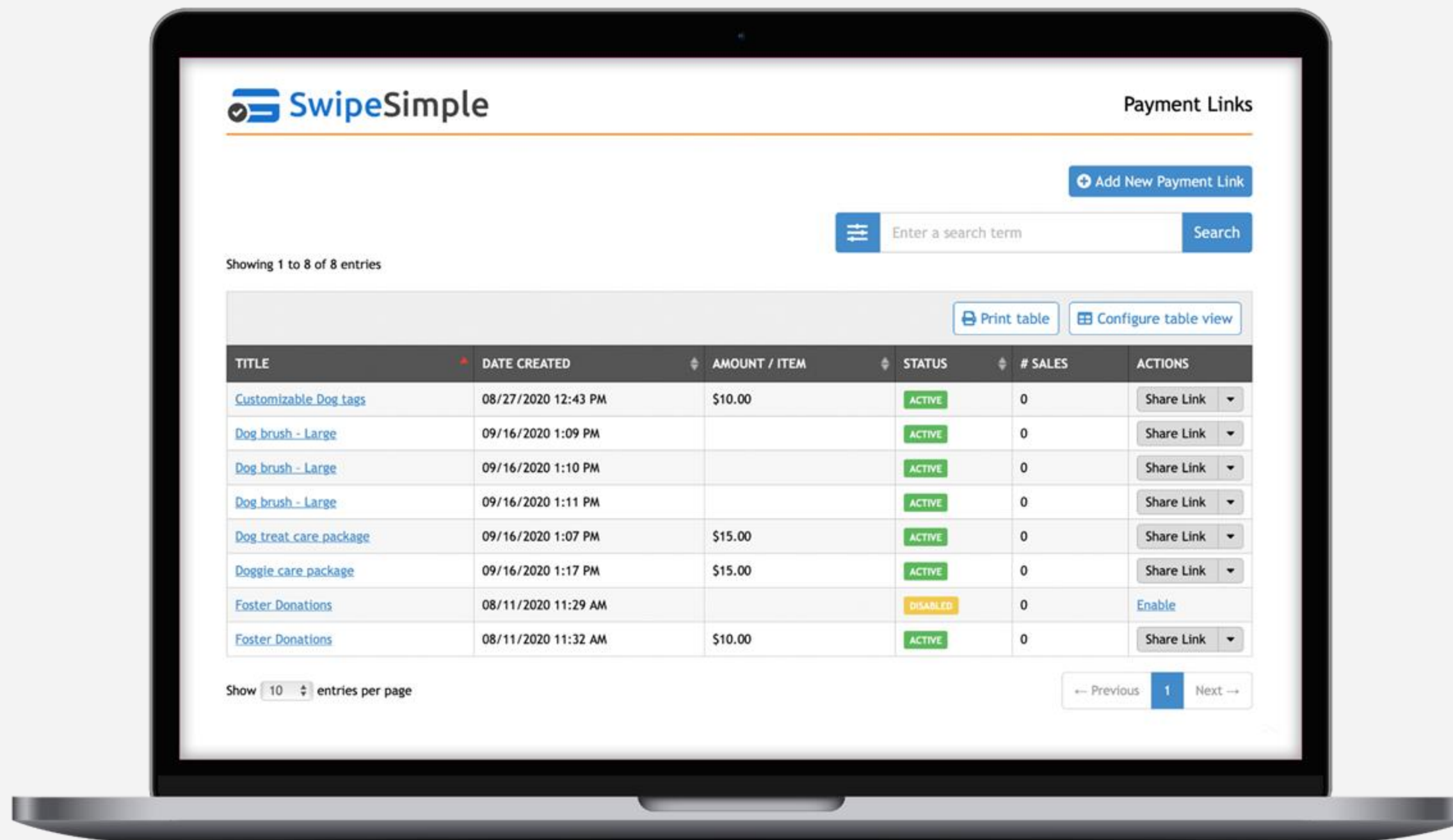
- Customer links

Send links via email or text message directly to your customers.

Customized multiple items and prompt for tip

- Share via social media

Post links to Instagram, Facebook, or Twitter and sell to followers.



The screenshot shows the SwipeSimple 'Payment Links' dashboard. At the top, there's a header with the SwipeSimple logo and the title 'Payment Links'. Below the header, there's a button to 'Add New Payment Link' and a search bar. The main content area displays a table of payment links. The table has columns for Title, Date Created, Amount / Item, Status, # Sales, and Actions. There are 8 entries shown. The first entry is 'Customizable Dog tags' with a date of 08/27/2020 12:43 PM, amount of \$10.00, and status of ACTIVE. The next three entries are 'Dog brush - Large' with dates 09/16/2020 1:09 PM, 09/16/2020 1:10 PM, and 09/16/2020 1:11 PM, all with status ACTIVE. The next two entries are 'Dog treat care package' and 'Doggie care package' with dates 09/16/2020 1:07 PM and 09/16/2020 1:17 PM, both with status ACTIVE. The last two entries are 'Foster Donations' with dates 08/11/2020 11:29 AM and 08/11/2020 11:32 AM, the first is DISABLED and the second is ACTIVE. Each entry has a 'Share Link' button in the Actions column. At the bottom of the table, there's a pagination control showing '1' of 8 entries per page.

TITLE	DATE CREATED	AMOUNT / ITEM	STATUS	# SALES	ACTIONS
Customizable Dog tags	08/27/2020 12:43 PM	\$10.00	ACTIVE	0	Share Link
Dog brush - Large	09/16/2020 1:09 PM		ACTIVE	0	Share Link
Dog brush - Large	09/16/2020 1:10 PM		ACTIVE	0	Share Link
Dog brush - Large	09/16/2020 1:11 PM		ACTIVE	0	Share Link
Dog treat care package	09/16/2020 1:07 PM	\$15.00	ACTIVE	0	Share Link
Doggie care package	09/16/2020 1:17 PM	\$15.00	ACTIVE	0	Share Link
Foster Donations	08/11/2020 11:29 AM		DISABLED	0	Enable
Foster Donations	08/11/2020 11:32 AM	\$10.00	ACTIVE	0	Share Link

Invoices - Mobile & Gateway

- Cloud-based Invoice management

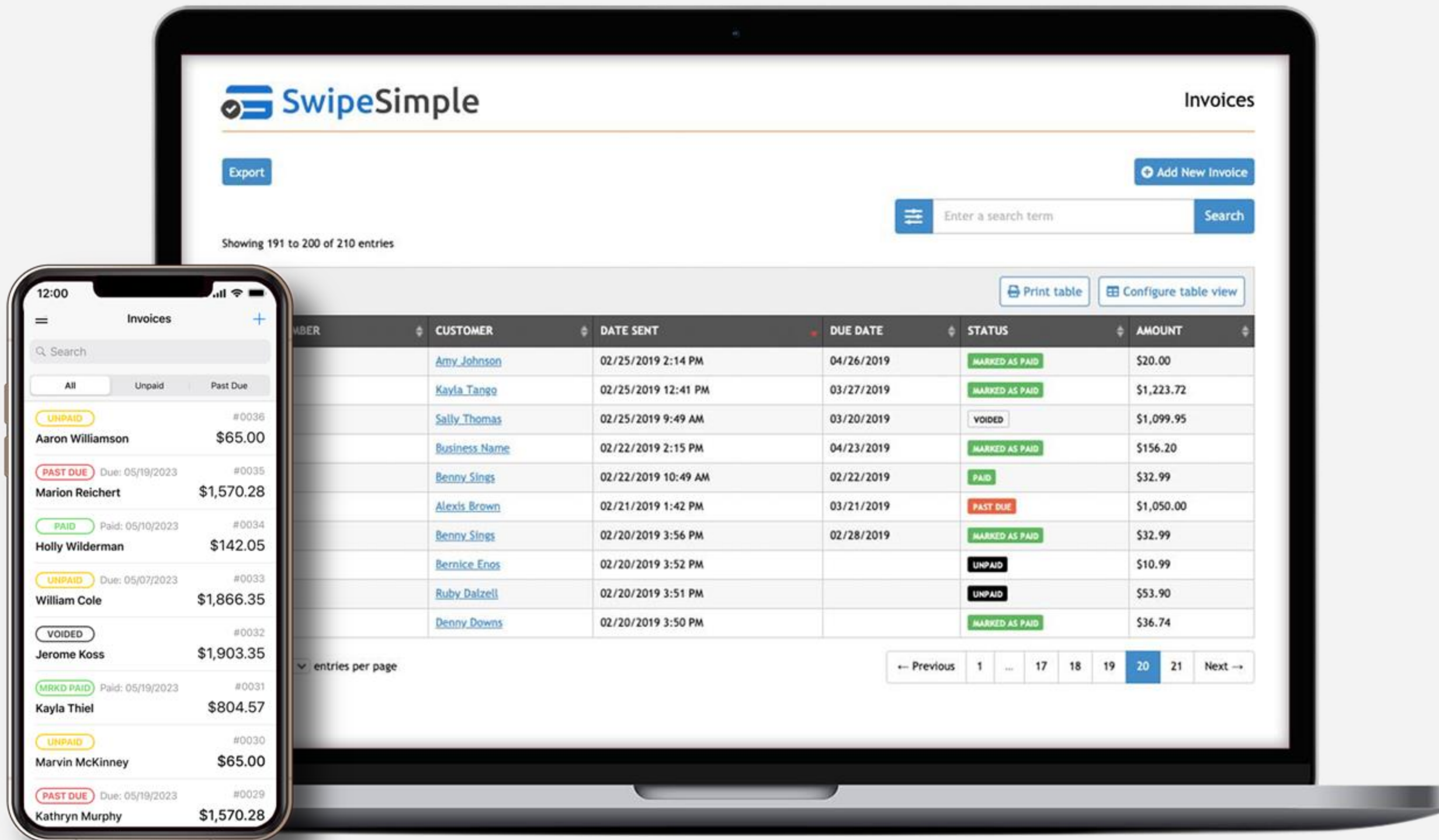
Send and manage invoices in seconds via the Mobile App or Web.

- Easy to send reminders

Instantly send payment reminders so you don't spend time chasing late payments.

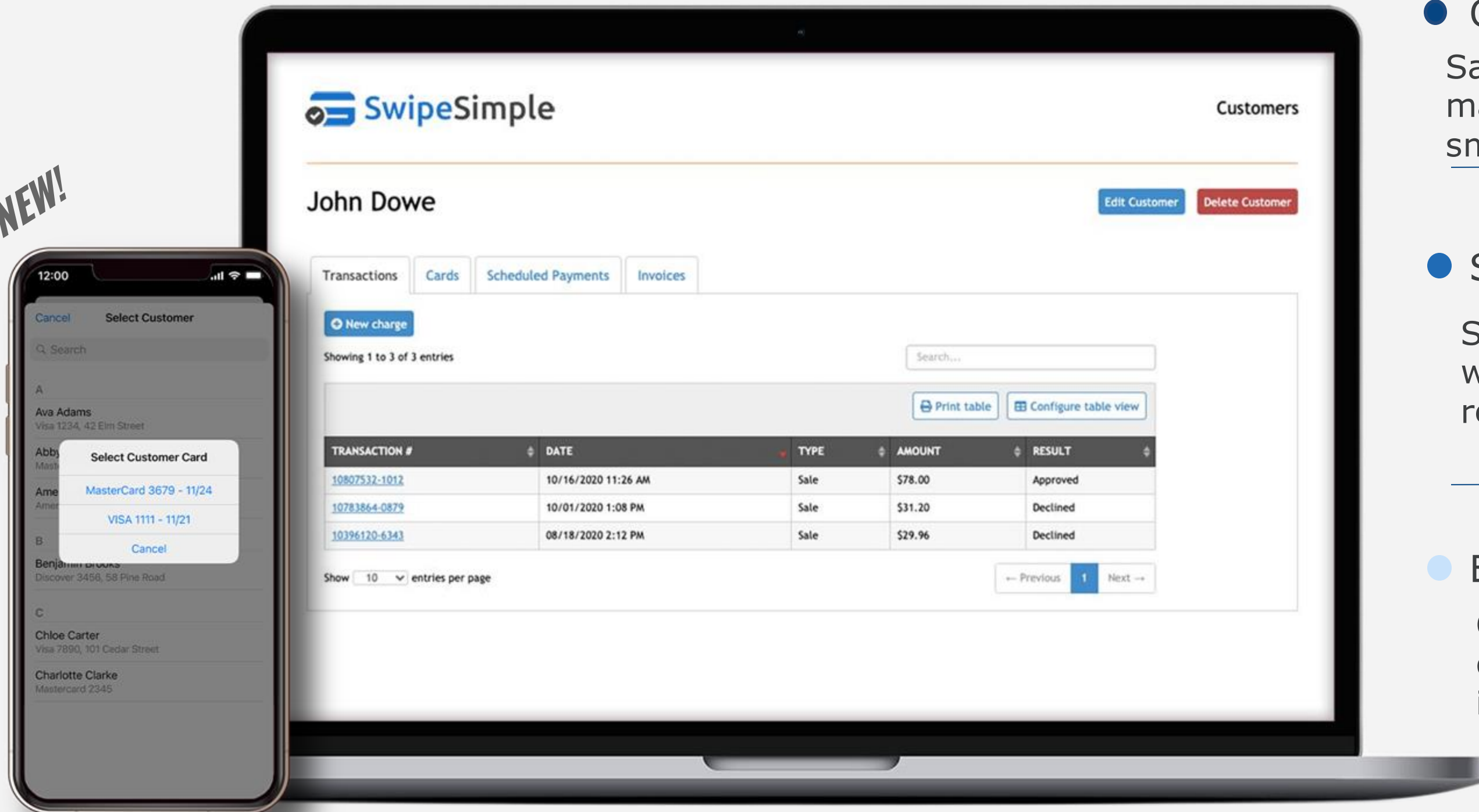
- Customizable branding

Add custom branding via the web which automatically applies to invoices sent anytime, anywhere.



Customers - Mobile & Gateway

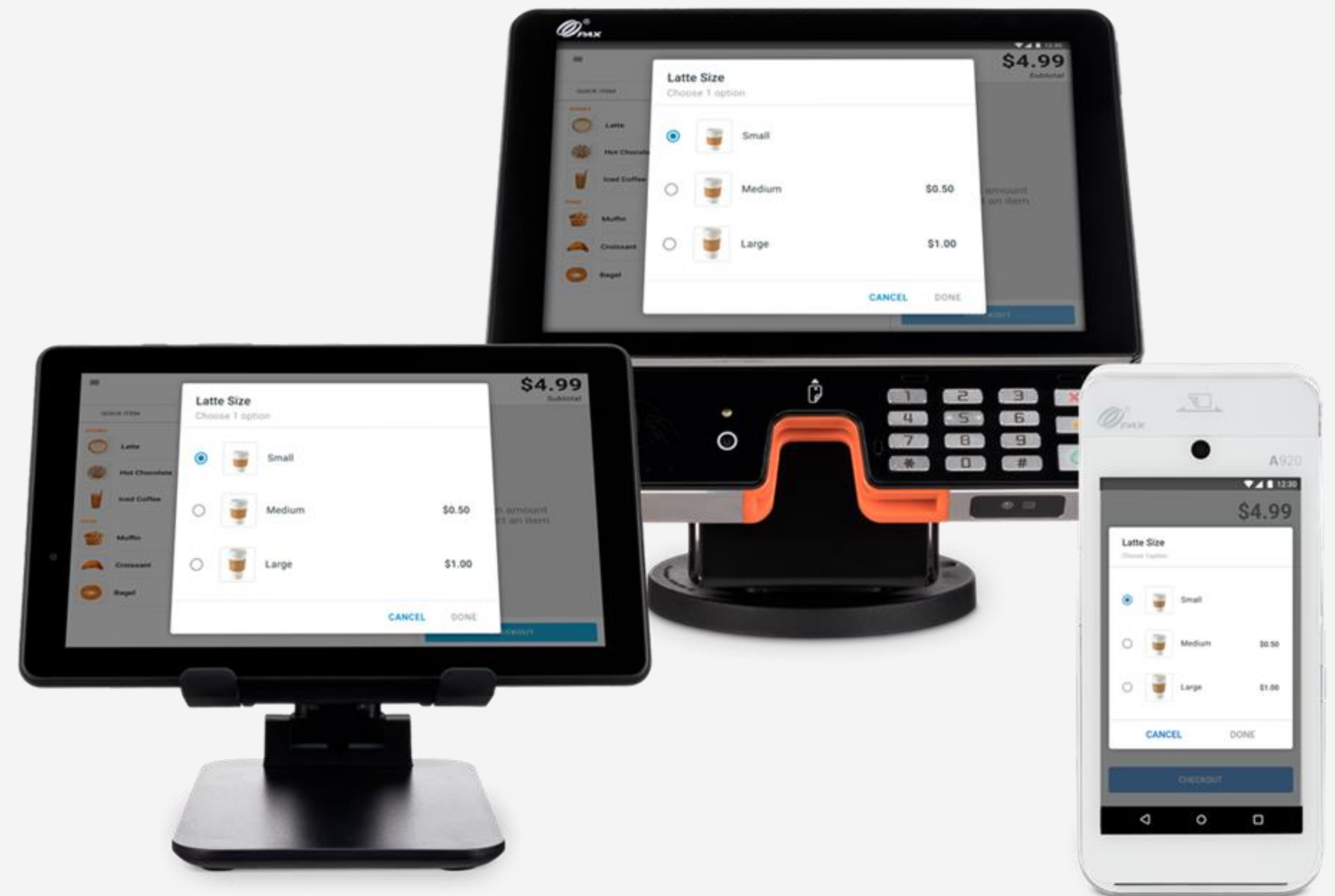
NEW!



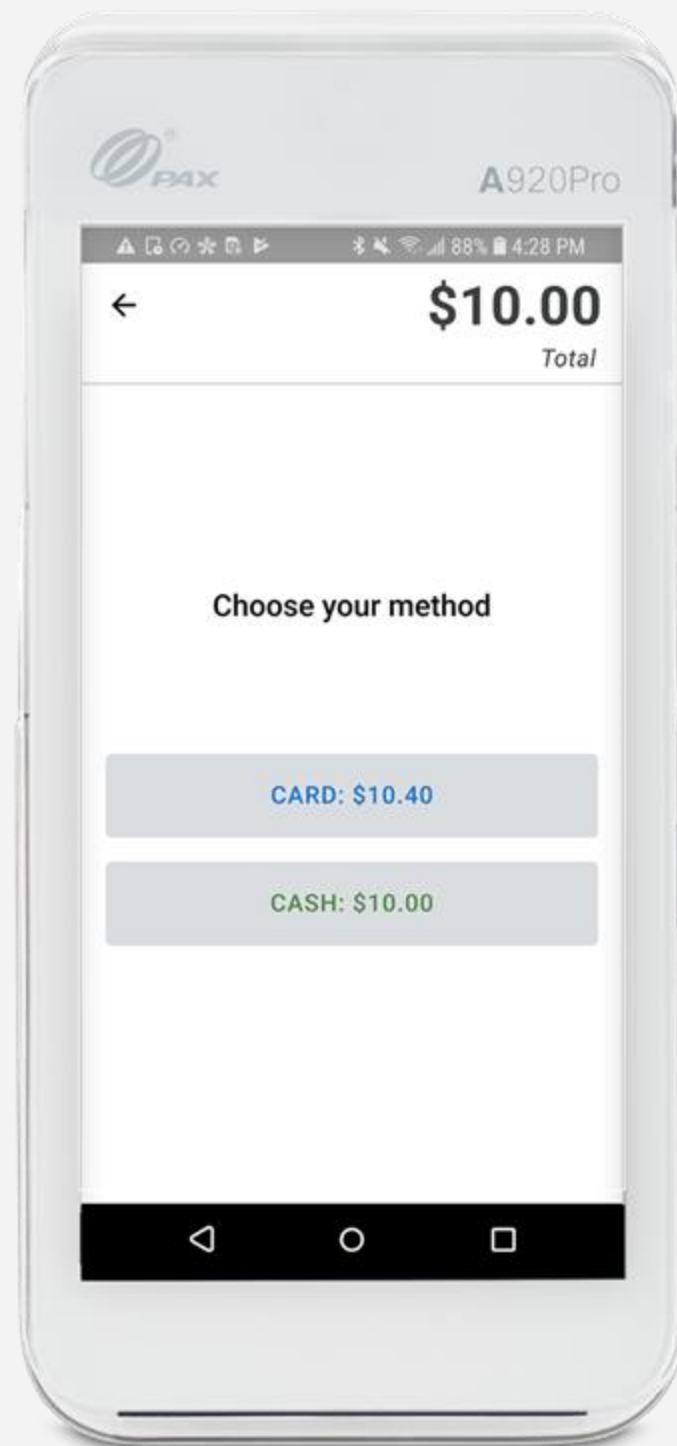
- Quick repeat sales
Save customer card-on-file details to make future purchases faster and smoother.
- Set-and-forget billing
Schedule automatic payments weekly, monthly, or yearly for regular customers.
- Easy info access
Quickly pull up saved customer details when making new sales or invoices.

Flexible Hardware Options

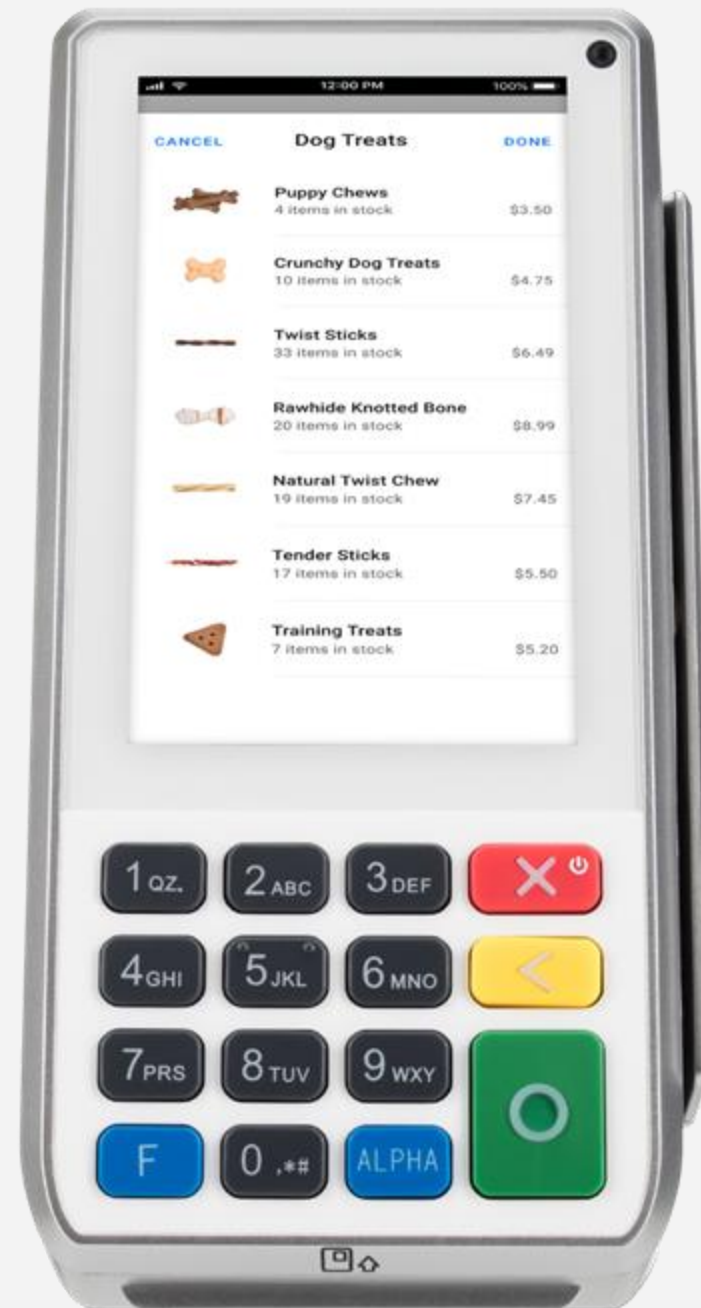
SwipeSimple Terminal & Register



Countertop Support With SwipeSimple Terminal



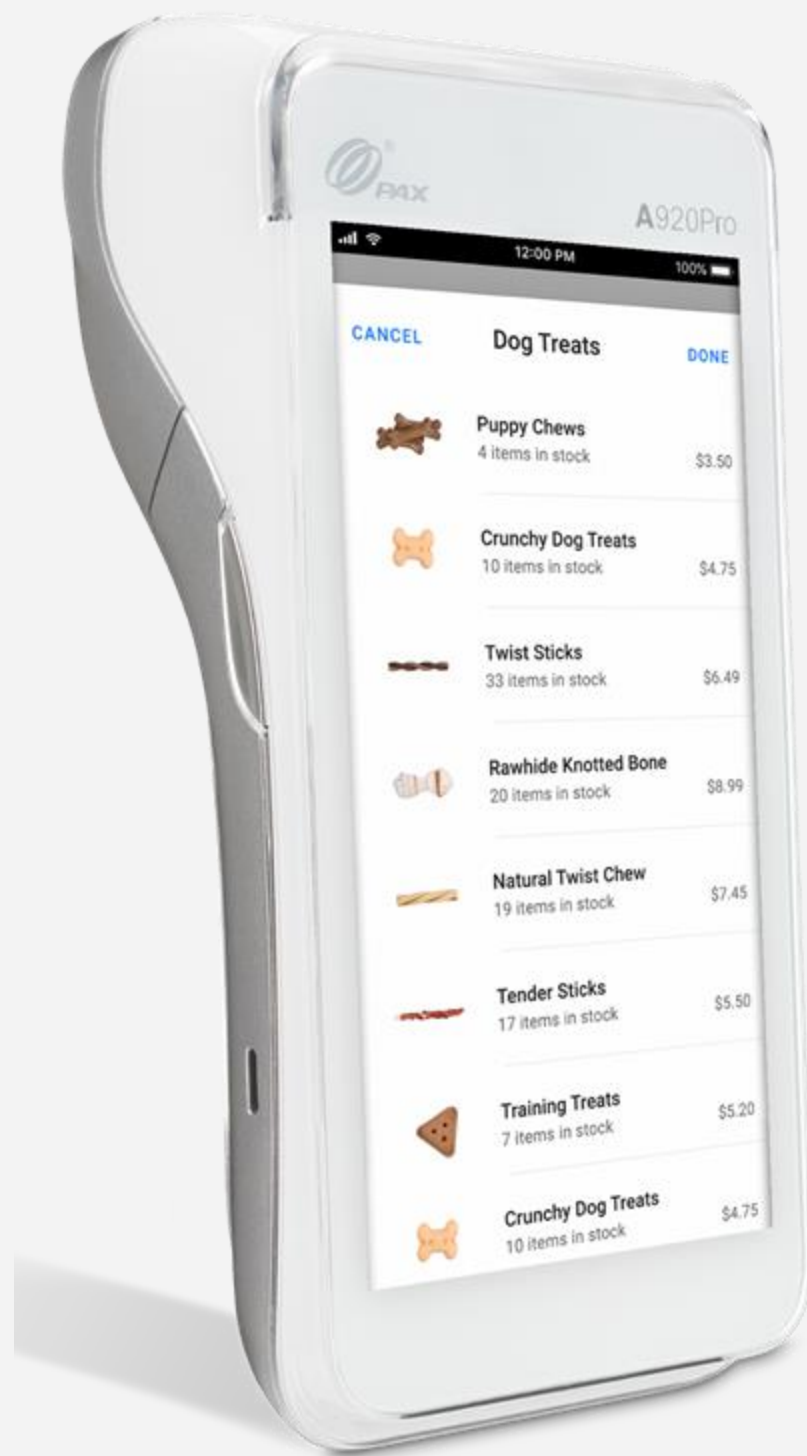
PAX A920 Pro



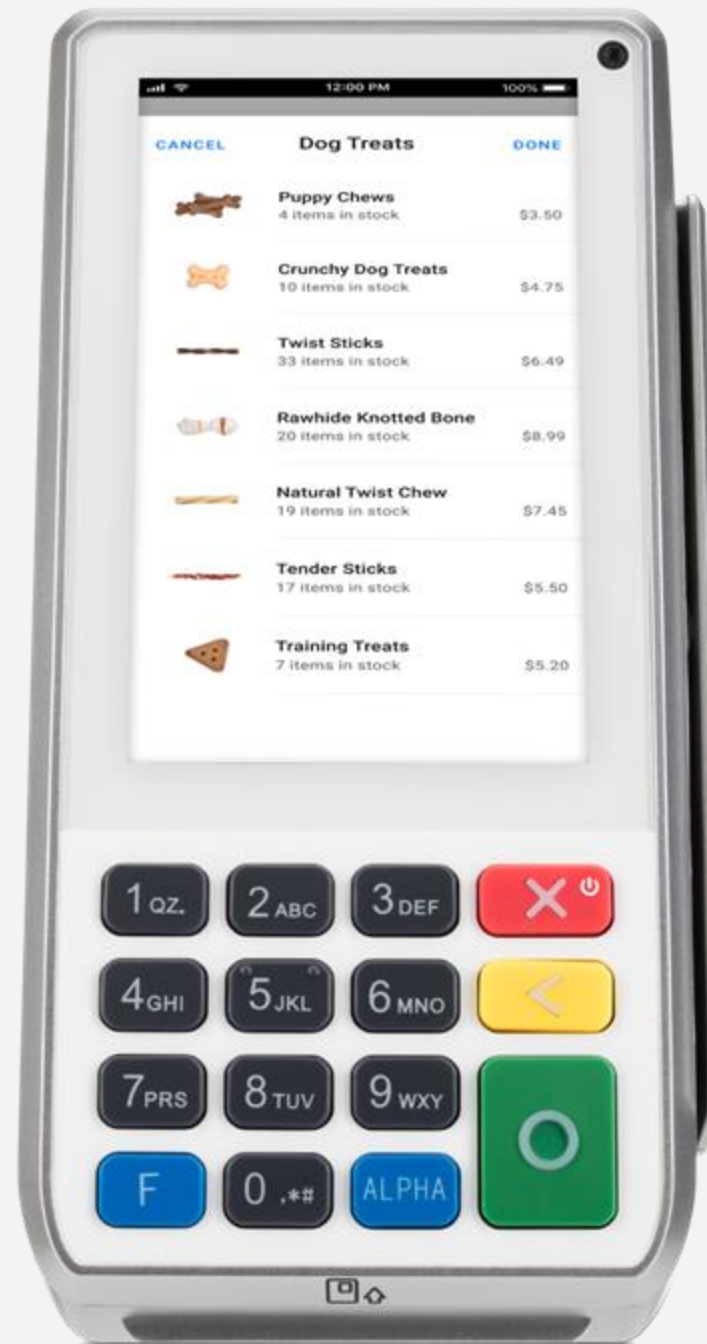
PAX A80

- Premium countertop solution
Two models, two price points helps you deliver the right solution across all your merchant types.
- Inventory and Menu Management
Shorten check-out time with easy to use Item Catalog. Track inventory sales across multiple devices.
- Post-Authorization Tip Adjust
Ideal for cafes and service providers. Plus detailed receipts for tax, discounts and tips.
- Support for Dual Pricing as part of reseller's program offering

Inventory Management



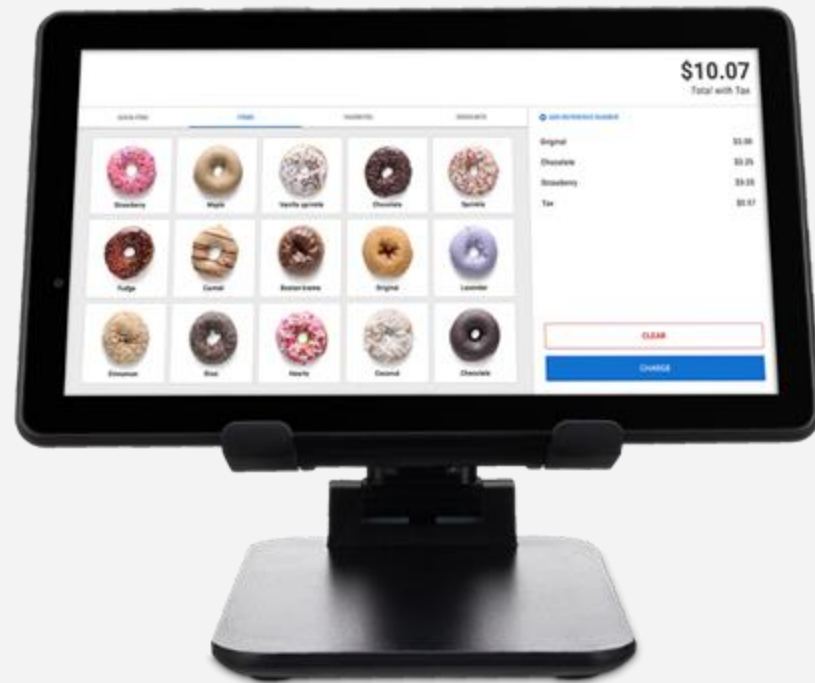
PAX A920 Pro



PAX A80

- **Powerful Inventory Management**
Prompting counter staff to select from popular items streamlines the customer's checkout experience.
- **Fast Item look up**
Customizable categories and items based upon merchant's top sellers
- **On-device Management**
Add/edit items directly on terminal. Make quick price adjustments. Track real-time inventory updates.
- **Cloud-based Reporting across one or multiple SwipeSimple Terminals**

SwipeSimple Register



BYOD Tablet

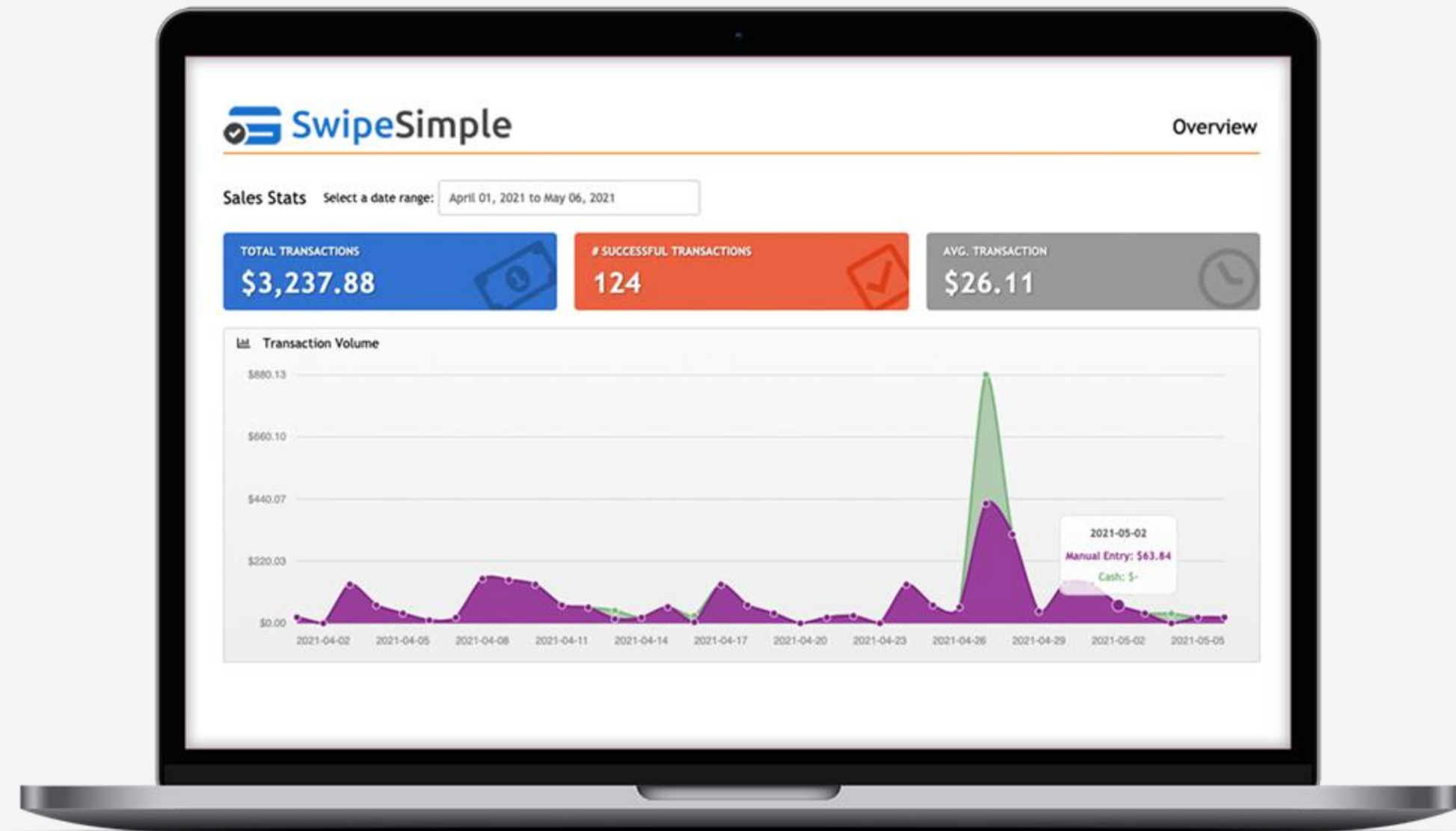


PAX Aries 8

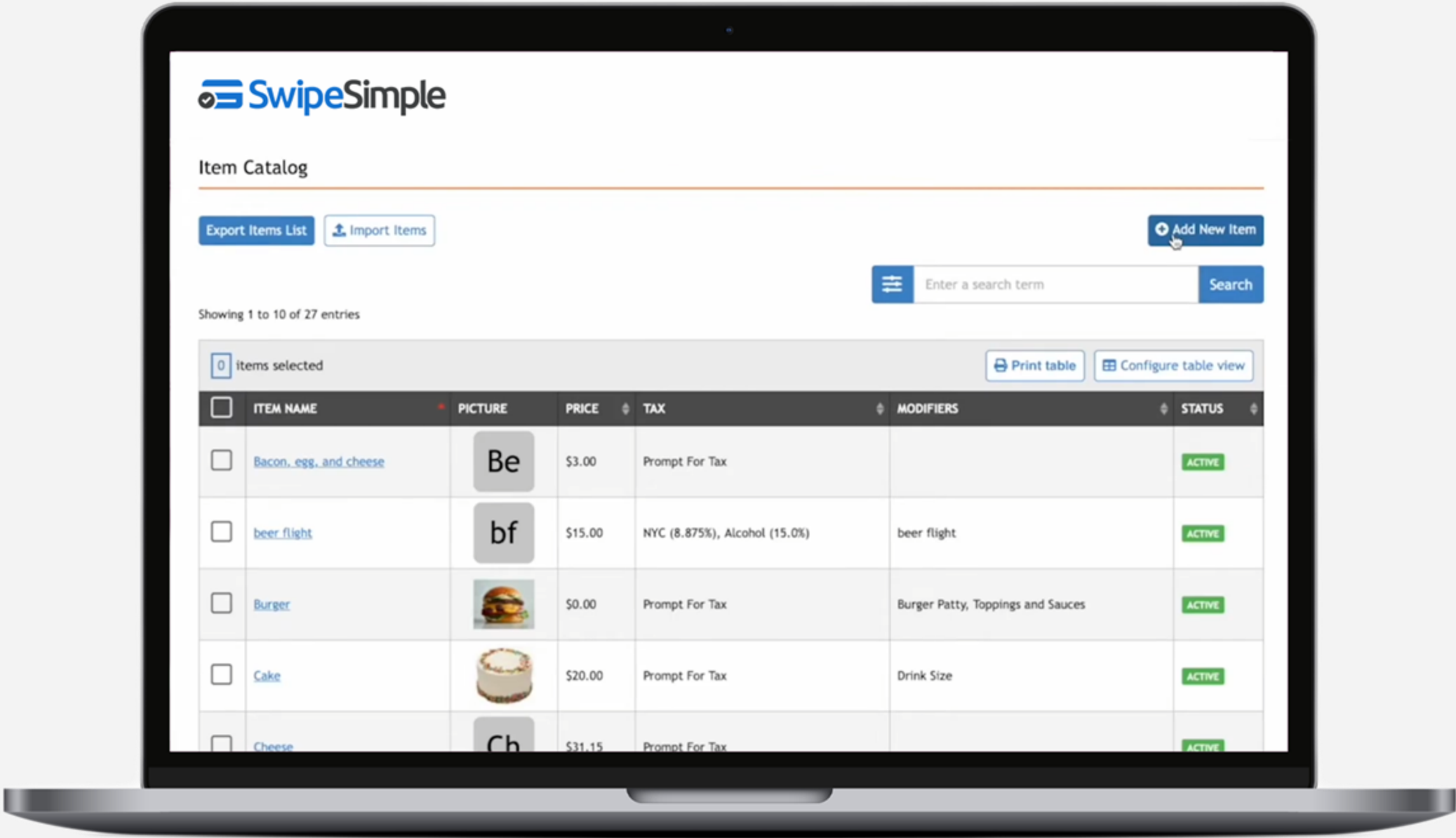
- Flexible, light, easy-to-use POS
Available on integrated PAX Aries 8 that swivels for customer input. Or, merchants can use their own tablets for fast set-up and start.
- Item Modifiers
Automatically adjust item prices based on every modification. No mental math required!
- Multi Item-Level Tax rates
Easily tax different categories of items at the appropriate tax rate for accurate payments.
- Printer and cash drawer support

Robust Reporting and Business Insights

SwipeSimple Dashboard

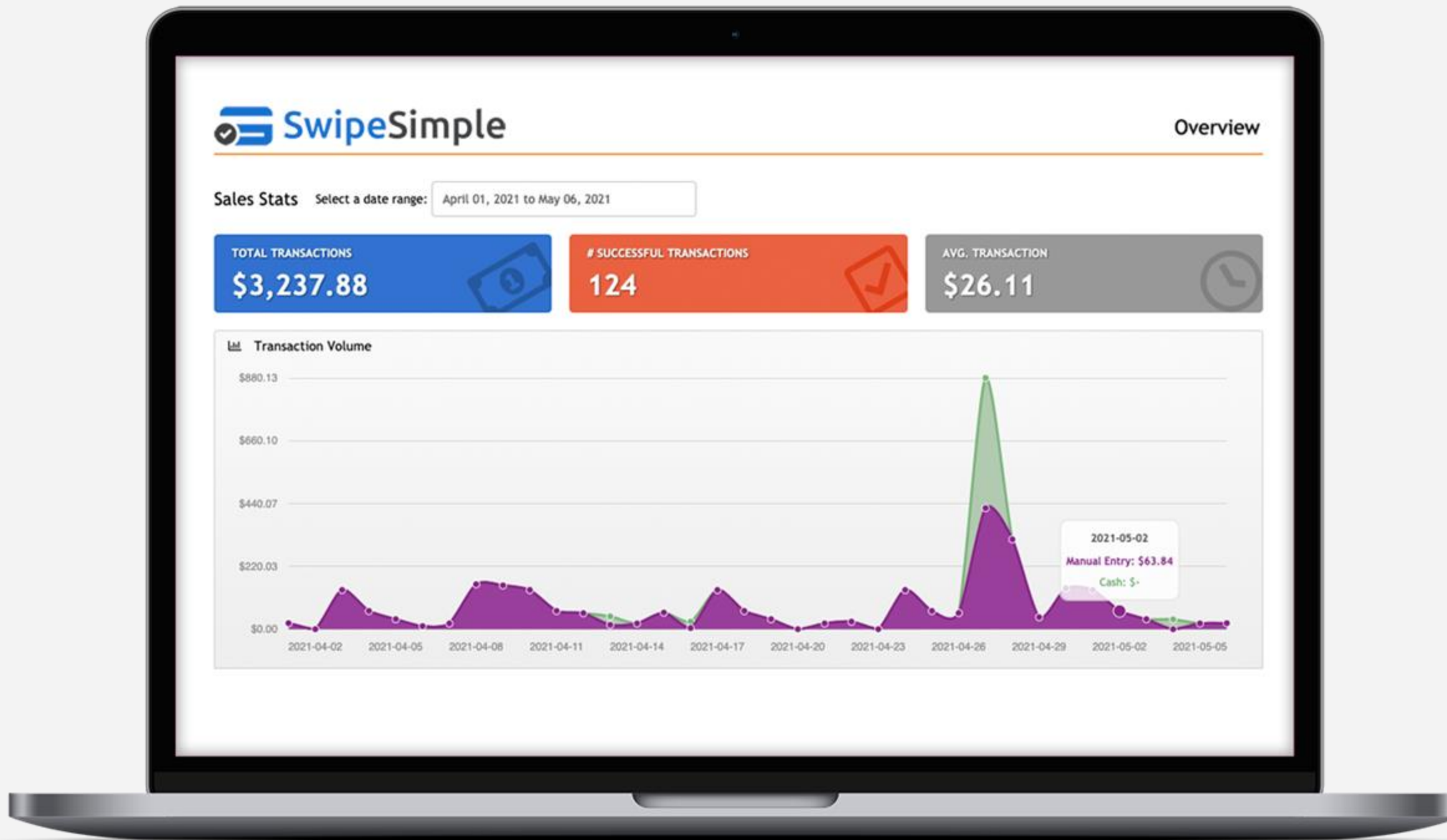


Inventory Management



- Real time tracking
Keep an eye on your stock and popular items as they sell.
- Auto cloud sync
Have your inventory data update automatically across all devices.
- Sales insights
Get easy-to-read reports showing which products are selling best.

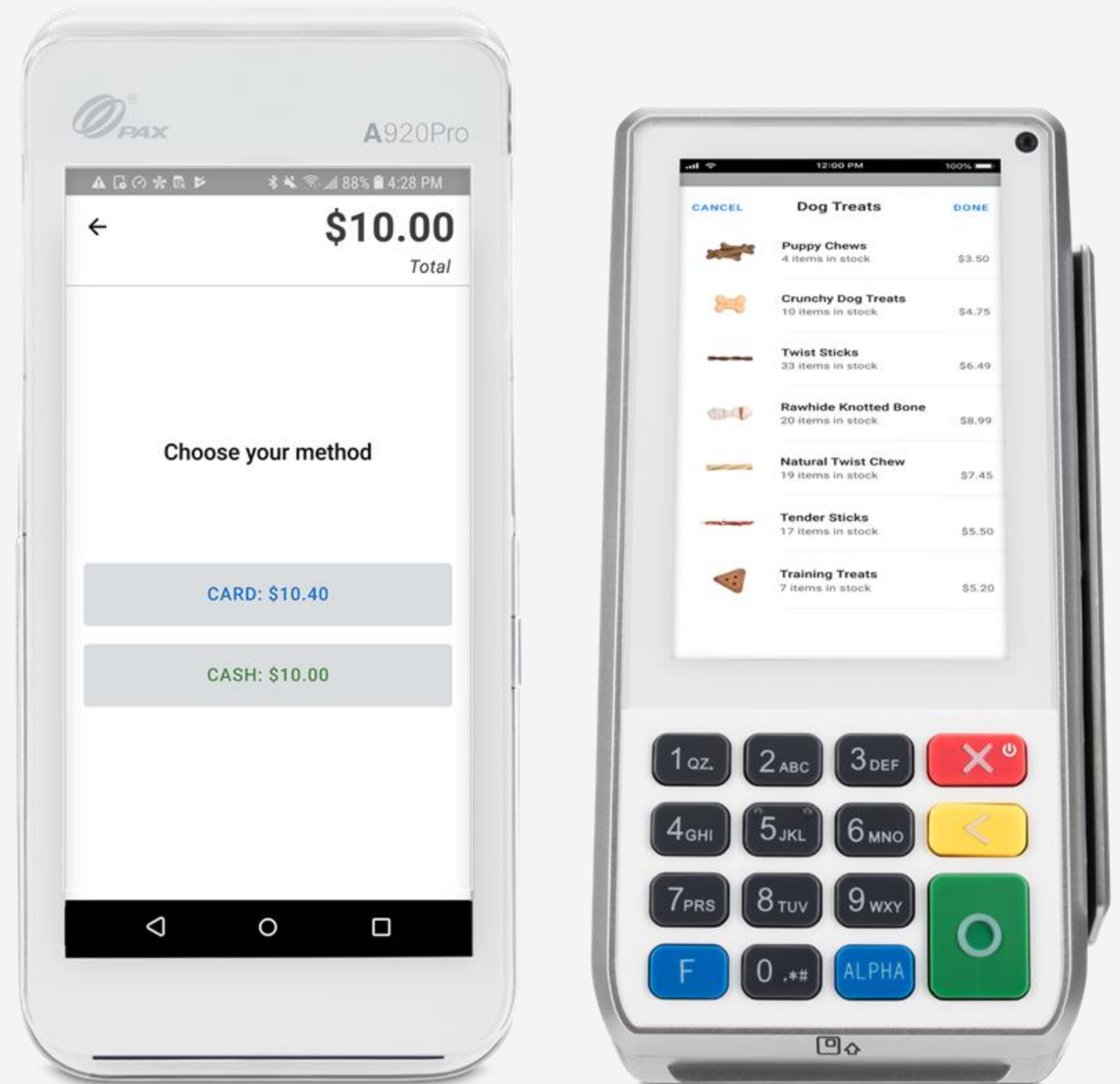
Reporting Dashboard



- Smart sales tracking
See how specific items are selling and understand your business performance easily.
- Simple tax prep
Download sales reports for any time period to make tax season less stressful.
- Customer insights
View individual purchase histories to find new ways to boost sales.

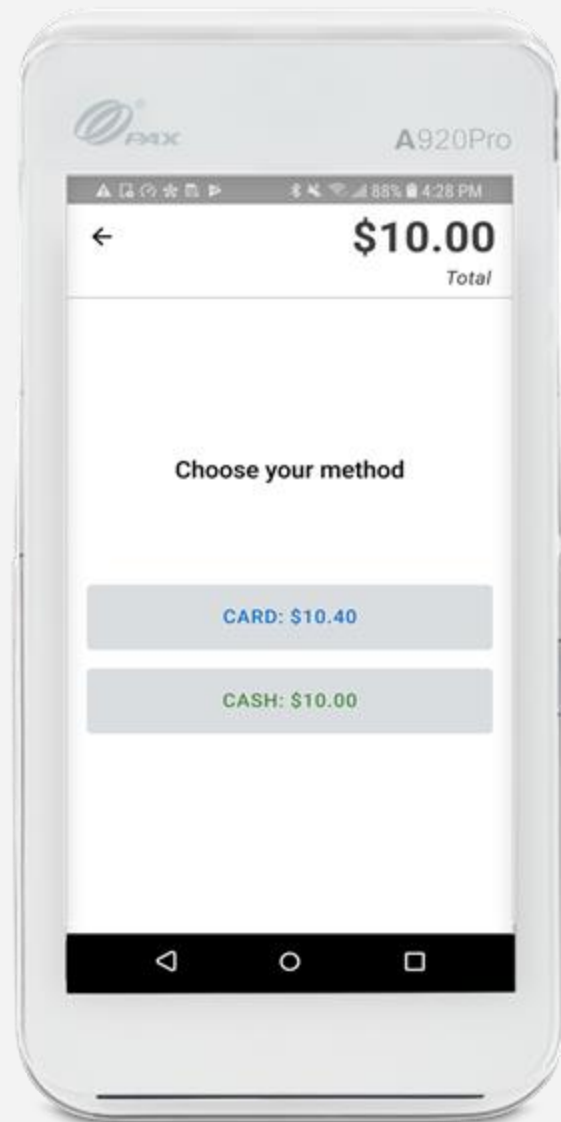
Support for Dual Pricing

Automatic Adjustment Feature

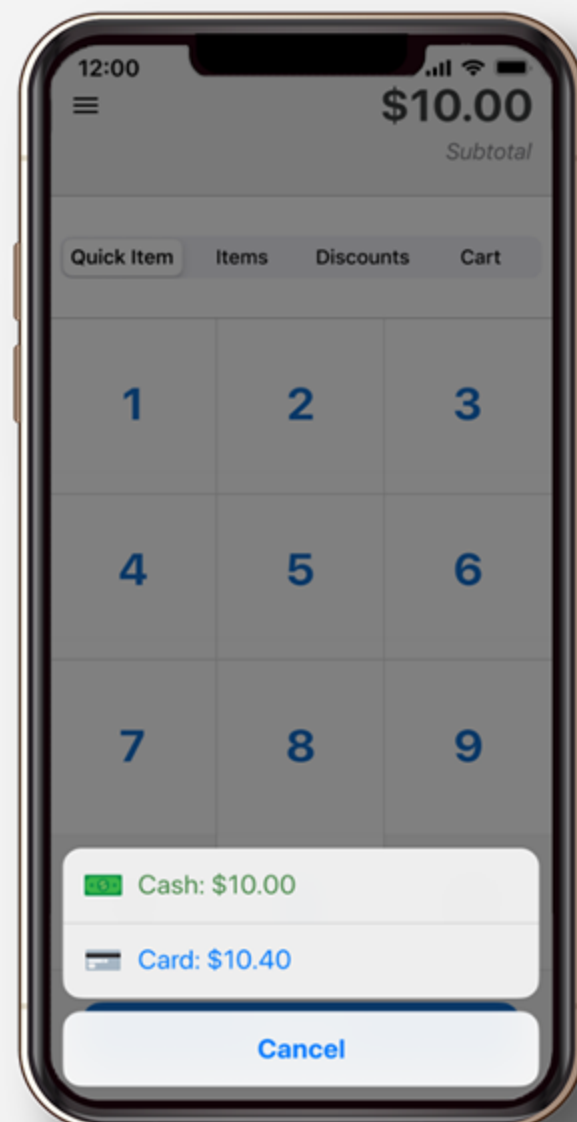


Dual Pricing With SwipeSimple

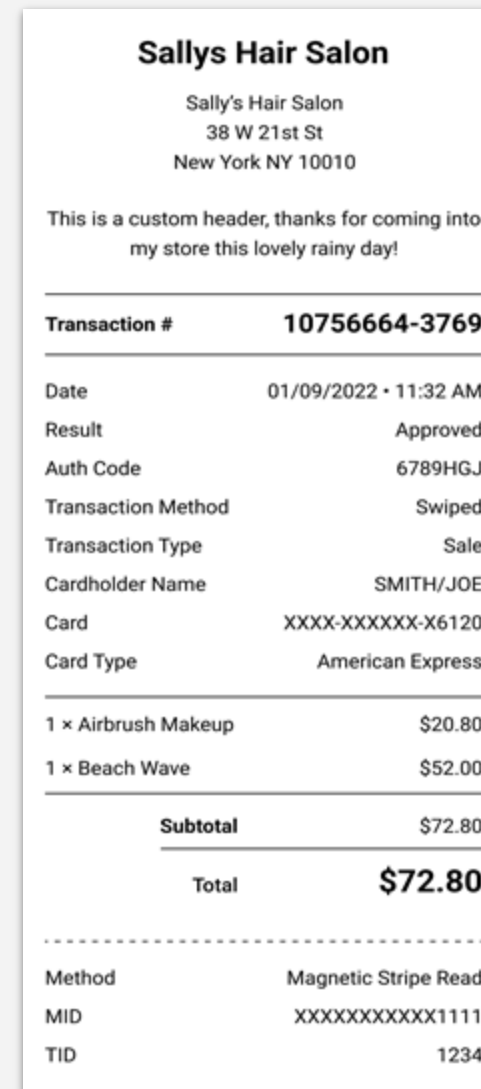
- Dual Pricing available on all the ways you can accept payments with SwipeSimple



**SwipeSimple
Terminal**



**SwipeSimple
Mobile App**



**Detailed
Receipt**

- Mobile App transactions
- Virtual Terminal
- Scheduled & Recurring Payments
- Payment Links
- Invoices
- SwipeSimple Terminal transactions
- Reporting
- Automatic adjustment on inventory and quick item based on cash and card

Merchants Best Served by SwipeSimple



Services

SwipeSimple empowers service providers with a versatile payment solution that lets them **accept payments onsite** when the job is finished.



Retail

From boutiques to bookstores, SwipeSimple streamlines **inventory tracking and check-out**, boosting efficiency for retail merchants.



Food & Beverage

With enhanced features like **Item Modifiers**, SwipeSimple enables food & beverage merchants to customize any order with ease..and get paid for it!



Entertainment

Enabling advanced ticket sales with **Payment Links**, venues can keep the show running smoothly with SwipeSimple.



**The merchants
we serve best**

Service merchants with similar needs that you will meet when you sell SwipeSimple



Landscapers



Plumbers



Carpenters



House cleaners



Painters



Roofers

Plumbers

Because they offer essential services to both businesses and homes within a community, **plumbers are always in demand**



As part of your merchant portfolio, they may look like:

- **Strong Revenue Performance** Avg annual processing: \$295,448
- **Steady Growth** 5% year-over-year
- **Excellent retention** 3.1 years

How they typically accept payments

- 26% Card Present
- 74% Card-Not-Present

Quick Facts on SwipeSimple for Plumbers

- ✓ Full range of CNP methods, from Invoices to Scheduled Payments
- ✓ Collect payment on site at the end of the job
- ✓ Best solution: **SwipeSimple Payments**

SwipeSimple Features to Keep Payments flowing for Plumbing Businesses



On-The-Go Payments

- Accept payments on-site, right after job completion
- Works with or without cellular data connection

Invoices

- Perfect for larger jobs or multi-day projects
- Create professional, itemized invoices on the spot

Virtual Terminal

- Process payments over the phone for estimates or parts orders
- Ideal for clients who want to prepay

Customers

- Build a database of client information and job history
- Quickly access past job details for returning customers

Practitioner and service provider merchants who have similar needs that you will meet when you sell SwipeSimple



Hair Stylists



Dentists



Chiropractors



Personal Trainers



Veterinarians



Wedding Planners

Dentists

The mix of routine and specialized care provided by Dentists aligns perfectly with **the flexible features of SwipeSimple**



As part of your merchant portfolio, they may look like:

- **Strong Revenue Performance** Avg annual processing: \$289,129
- **Steady Growth** 19% year-over-year
- **Excellent retention** 3 years

How they typically accept payments

- 39% Card Present
- 61% Card-Not-Present

Quick Facts on SwipeSimple for Dentists

- ✓ Accommodates high-volume, high-value transactions efficiently
- ✓ Supports multiple practitioners within a single practice
- ✓ Best solution: **SwipeSimple Payments + Terminal**

SwipeSimple Features to keep a Dental practice's customers *and* front office staff smiling



Scheduled Payments

- Ideal for ongoing treatments like orthodontics
- Automates monthly payment collection

Reporting Dashboard

- Provides insights into practice financial performance
- Helps identify popular treatments and peak business hours

Invoices

- Easily charge patients after a service is completed
- See which invoices are unpaid at a glance

Customers

- Securely stores payment information for returning patients
- Streamlines checkout process for repeat visits

Service + retail merchants who have similar needs that you can meet when you sell SwipeSimple



Tailors



Auto Shops



Print Shops



Watch Repairs



Bike Shops



Car Washes

Auto Shops

The combination of **on-site services** and **specialty products** make Auto Repair Shops ideal SwipeSimple merchants



As part of your merchant portfolio, they may look like:

- **Strong Revenue Performance** Avg annual processing: \$152,602
- **Steady Growth** 6% year-over-year
- **Excellent retention** 2.5 years

How they typically accept payments

- 36% Card Present
- 64% Card-Not-Present

Quick Facts on SwipeSimple for Auto Shops

- ✓ Offers flexible invoicing for multi-day repairs and parts ordering
- ✓ Provides mobile payment options for roadside assistance
- ✓ Best solution: **SwipeSimple Payments + Terminal**

SwipeSimple Features keep Auto Repair Shop payments running smoothly



Virtual Terminal

- Process phone payments for parts orders or deposits
- Ideal for customers approving additional work remotely

Inventory Management

- Upload parts inventory to the SwipeSimple
- Automatically update stock levels as parts are used and billed

Smart Terminal

- Manage inventory in one handheld device
- Easily view transaction history and settle tips prior to batching

Customers

- Store vehicle and service history for quick reference
- Charge a card-on-file for routine maintenance

Speciality retail merchants who have similar needs that you can meet when you sell SwipeSimple



Dance Studios



Pro Shops & Sporting Goods



Art Supplies



Antique Shops



Camping Stores



Gourmet Food Stores

Pro Shops & Sporting Goods



With **high-value items and seasonal merchandise**, local Pro Shops & Sporting Goods stores need SwipeSimple to streamline check-out

As part of your merchant portfolio, they may look like:

- **Strong Revenue Performance** Avg annual processing: \$84,030
- **Steady Growth** 5% year-over-year
- **Excellent retention** 3 years

How they typically accept payments

- 69% Card Present
- 31% Card-Not-Present

Quick Facts on SwipeSimple for Sporting Goods Stores

- ✓ Supports both in-store and hosted payments pages seamlessly
- ✓ Offers flexible payment options for programs and products
- ✓ Best solution: **SwipeSimple Payments + Register**

SwipeSimple Features keep Sporting Goods Stores in the zone



Payment Links

- Seamlessly handle transactions both in-store and online
- Allow customers to pre-pay for select items

Inventory Management

- Keep track of stock levels across multiple channels in real-time
- Easily manage seasonal inventory fluctuations

Item Modifiers

- Easily keep track of different sizes and colors when checking out items
- Get an itemized receipt for each transaction

Favorites Pages

- Keep Inventory organized on any tablet or Register hardware
- Easily select best sellers during checkout to speed up payment time

Food + beverage merchants who have similar needs that you can meet when you sell SwipeSimple



Coffee Shops



Bakeries



Fish Markets



Juice Bars



Farmers Markets



Food Trucks

Bakeries

Bakeries' blend of daily walk-in sales and custom order services makes them **excellent SwipeSimple merchants**



As part of your merchant portfolio, they may look like:

- **Strong Revenue Performance** Avg annual processing: \$94,798
- **Steady Growth** 5% year-over-year
- **Excellent retention** 2.6 years

How they typically accept payments

- 80% Card Present
- 20% Card-Not-Present

Quick Facts on SwipeSimple for Bakeries

- ✓ Handles quick in-store sales and pre-orders efficiently
- ✓ Supports easy invoicing for large custom orders (e.g., weddings)
- ✓ Best solution: **SwipeSimple Payments + Register**

SwipeSimple Features sweeten the payment experience for Bakeries



USB Hardware

- Connect to a printer or cash drawer for in-person sales
- Any order modifications automatically printed on the receipt

Inventory Management

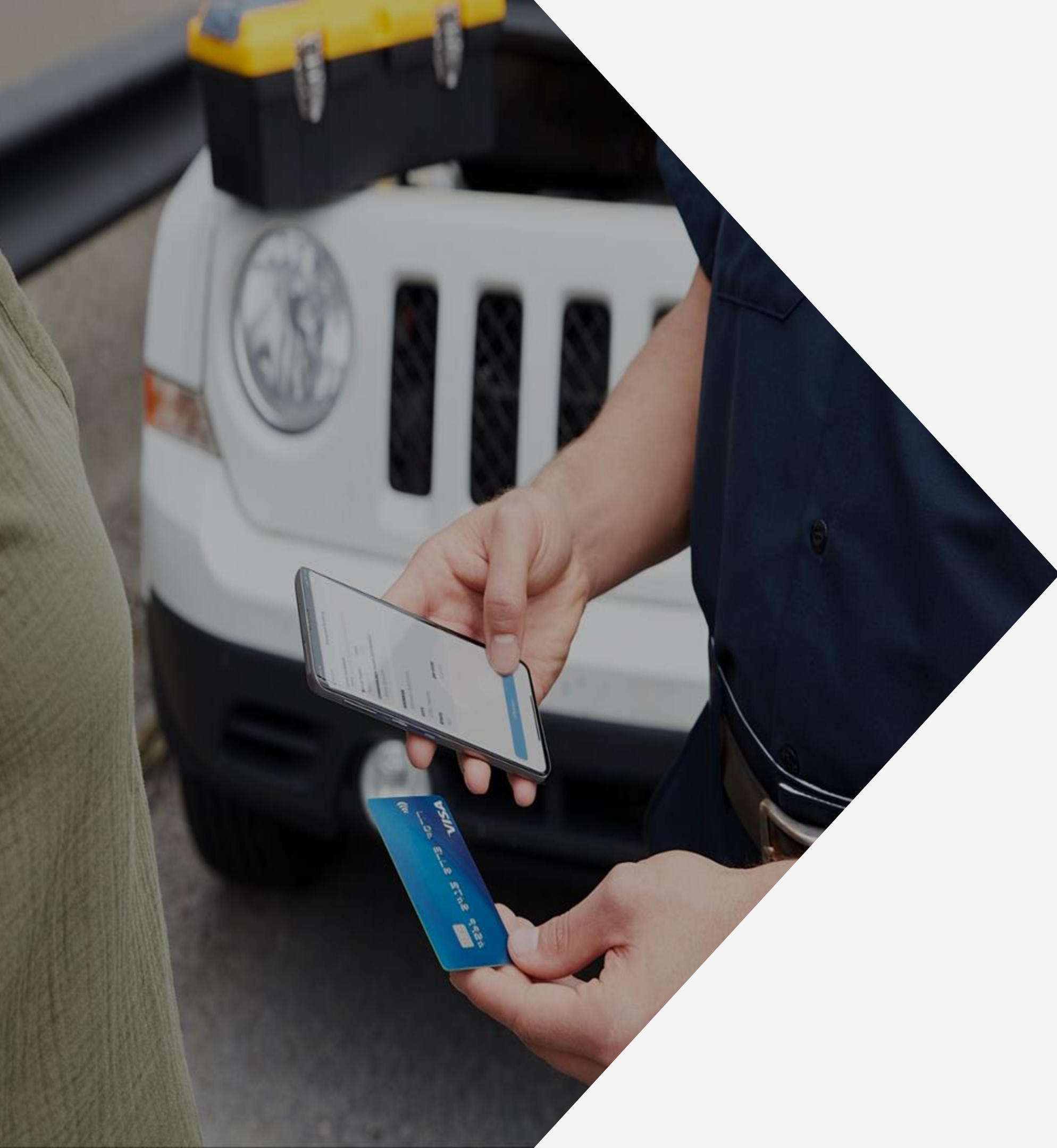
- Monitor ingredient levels and finished product stock in real-time
- Optimize production based on sales trends

On-The-Go Payments

- Take payments at farmers markets or pop-up events
- Process sales anywhere in the shop during peak hours

Item Modifiers

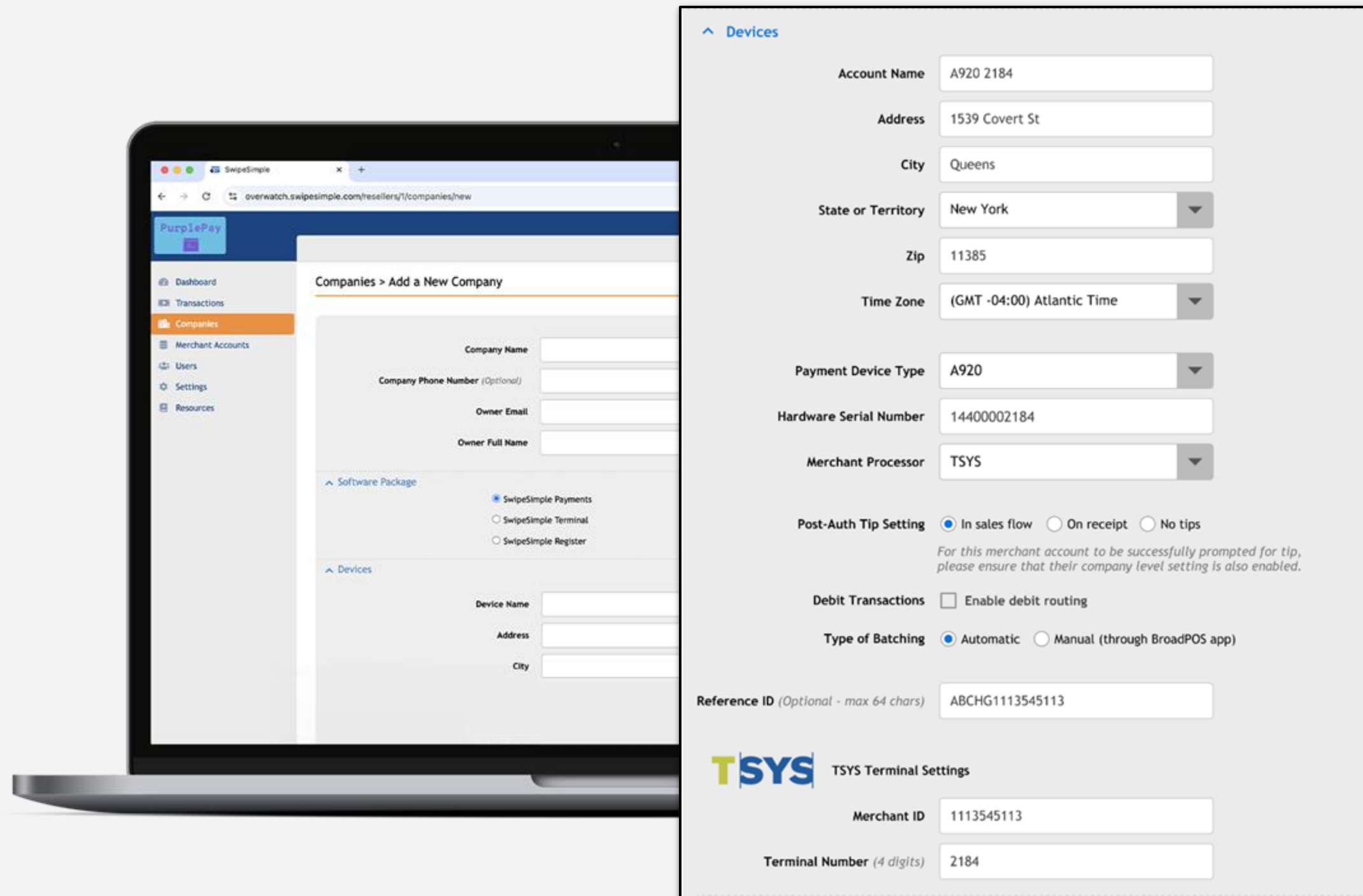
- Add, remove, or substitute ingredients based on customer preferences
- Handle dietary restrictions (e.g., gluten-free, vegan options) effortlessly



Strong Partnership

Flexibility to Sell and Board

- Promote your brand ... or ours
CardFlight gives partners the flexibility to promote the features of SwipeSimple under our product name or under your branded offering. No restrictive brand requirements.
- Flexibility in processors
Multiple processors supported so partners can negotiate their own agreements.
 - Fiserv Rapid Connect Nashville
 - Fiserv Omaha
 - Worldpay
 - TSYS
- Our partners make choices that are best for their business



Companies > Add a New Company

Company Name:

Company Phone Number (Optional):

Owner Email:

Owner Full Name:

Software Package

☒ SwipeSimple Payments

☐ SwipeSimple Terminal

☐ SwipeSimple Register

Devices

Device Name:

Address:

City:

Account Name: A920 2184

Address: 1539 Covert St

City: Queens

State or Territory: New York

Zip: 11385

Time Zone: (GMT -04:00) Atlantic Time

Payment Device Type: A920

Hardware Serial Number: 14400002184

Merchant Processor: TSYS

Post-Auth Tip Setting: ☒ In sales flow ☐ On receipt ☐ No tips

For this merchant account to be successfully prompted for tip, please ensure that their company level setting is also enabled.

Debit Transactions: ☐ Enable debit routing

Type of Batching: ☒ Automatic ☐ Manual (through BroadPOS app)

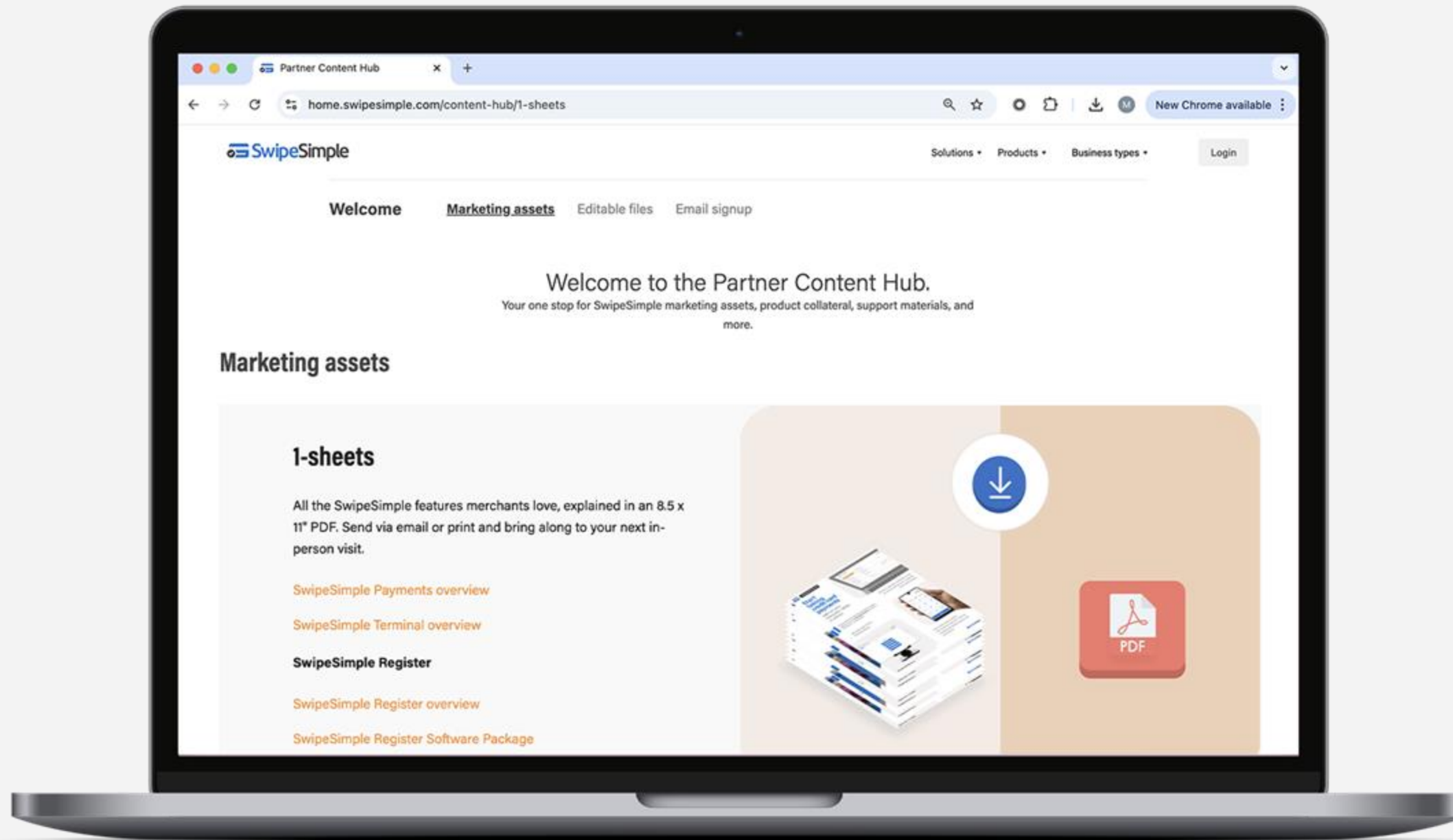
Reference ID (Optional - max 64 chars): ABCHG1113545113

TSYS Terminal Settings

Merchant ID: 1113545113

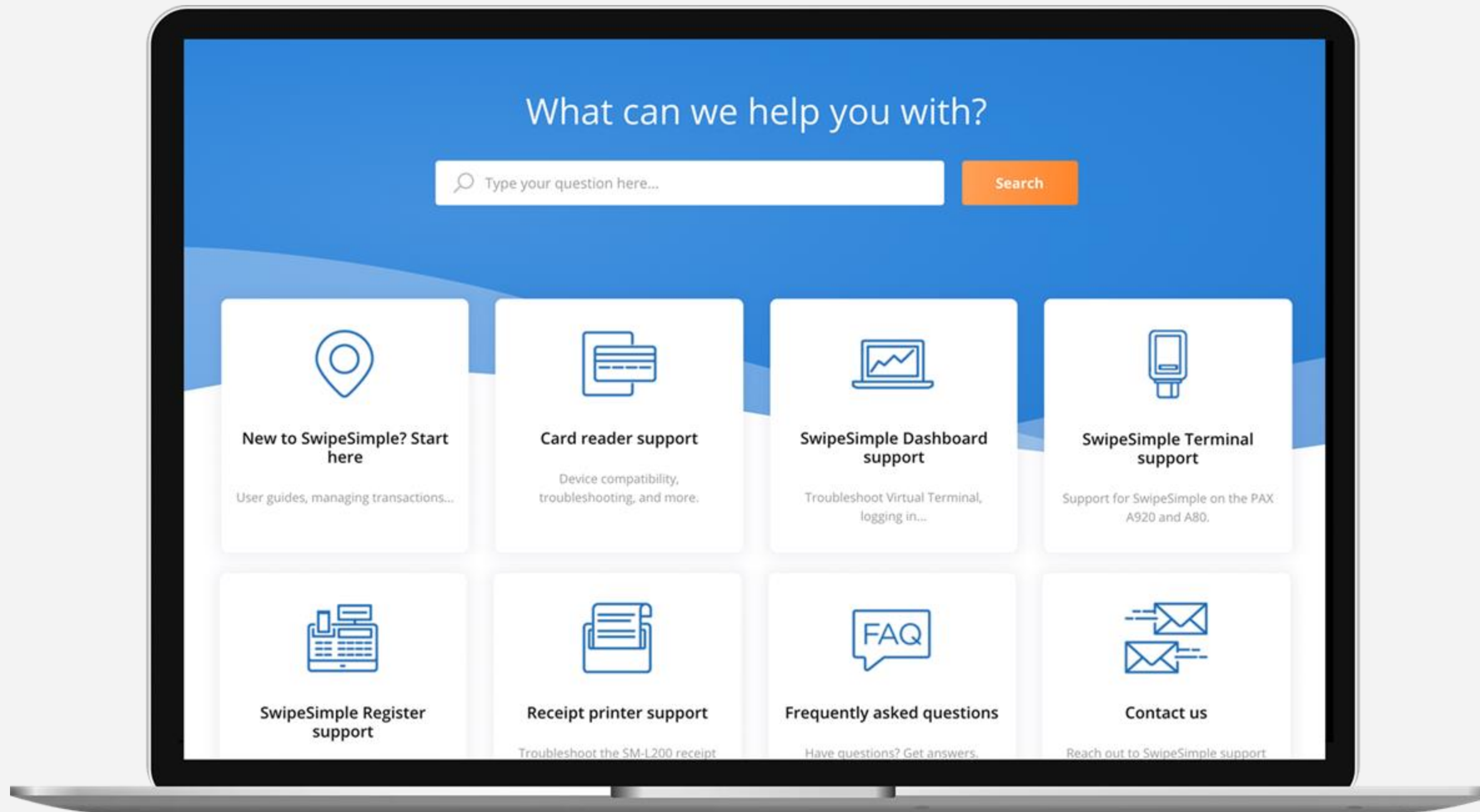
Terminal Number (4 digits): 2184

Committed to Sales Success



- Demo modes of the solutions
Demo modes that help your sales reps close the sale.
- Robust sales tools
Up-to-date videos and sales collateral that is easily accessed by sales teams and agents in the field, while they are face-to-face with their customer prospects.
- A team to support your team
The partnership doesn't end after the first training. You'll receive help from our team at launch and through on-going product education and webinars on sales trends and strategies.

Support for Your Team



- **Customer Support Center**
Easy to search online Support Center that helps your team get their questions answered 24/7/365.
- **Phone-based Support**
Live human support for operations, boarding, and support teams during business hours.
- **Timely Response**
Our team strives to respond to 100% of inbound emails within one business day.

SwipeSimple



 CardFlight