



Business Partner New Customer Setup Procedures



The information below will provide you with the guidelines and timelines for our full-service customer setup program.

The setup procedure below replaces any prior agreement for billing. Shift4 will assist the Business Partner by providing a full-service initial customer setup for our mutual customer to include Installation Coordination, Implementation, and Training, at no charge to the Business Partner or our mutual customers, as we feel it is mutually advantageous.

Installation Coordination Services

(Estimated completion time two (2) weeks)

Step 1: The Business Partner must submit an executed Master Service Agreement (MSA) and return it via mail, email (newaccount@shift4.com), or fax (702-597-2499) to Shift4.

Step 2: The Business Partner must complete the Business Partner New Account Application and return it via email (newaccount@shift4.com) three (3) weeks prior to the anticipated Go Live Date for Integrated Payment Processing through Shift4.

Step 3: Once Shift4 has received both items mentioned in Steps 1 and 2 above, Shift4's Coordination Staff will work directly with the Primary End-User Contact specified. Shift4 coordination services will include:

- 1) Sending out a welcome letter to the End-User to outline the setup process
- 2) Sending out a New Account Setup Application to be completed by the End-User
- 3) Contacting the End-User directly, to assist in identifying which processor they are using, as well as assisting them in filling out the appropriate processor-specific Profit Center Form.

Step 4: Once Shift4 has received the completed paperwork including the processor-specific Profit Center Form from the Primary End-User Contact, we will perform verification with the Processor to assure that there are no errors or omissions; once verified without errors Shift4 will be able to implement the new setup within 72 hours (three (3) business days) of receipt.

Note: The Merchant Setup information will need to be submitted to Shift4 by the End-User Property 5-7 Business Days prior to the go-live so that we have ample time to perform the verification and have it implemented into our system.

When the setup is complete, the Installation Coordinator will forward the information necessary to integrate DOLLARS ON THE NET® with your Point of Sale solution to the Business Partner Project Manager.

The information sent will include the following:

- Shift4 Serial Number
- Shift4 MID(s) including payment type setup per merchant
- Shift4 Password(s)

Implementation Services (Installing DOLLARS ON THE NET)

(Estimated completion time of 3-5 days after Installation Coordination Services have been completed)

If the Business Partner has chosen to utilize Shift4's installation team to perform the UTG installation:

Shift4 will contact the customer to let them know that their setup is complete, and schedule the installation of our UTG with the customer, directly. Shift4 will continue to keep the Business Partner's Project Manager informed on the progress at this level.



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All assisted Installations will take place over the telephone, as onsite or remote access installations are not permitted for Shift4 Technicians as this does not comply with our PCI certifications.

Before Shift4 performs an installation, we perform an Infrastructure on the PC/Server that the UTG will be loaded on to help ensure the installation will be successful. This will need to pass successfully **before an installation can be scheduled.**

In some cases, the customer's PC/Server is located at the Business Partner's office until the technician takes it onsite to implement the setup. In these cases, it is helpful if Shift4 and the Business Partner's technicians work together on the Infrastructure and Installation process while the customer's PC is still at the Business Partner's office.

This will allow a more pre-staged/pre-packaged installation that is ready to go-live before the hardware gets delivered to the customer. This service is optional, as each Business Partner handles their installations differently.

Business Partners and Shift4 should coordinate their installations together to best accommodate customer's go live dates. We greatly prefer to have accounts setup and installed at least one (1) week before the customer's anticipated go live date.

Reminder: Shift4 does not charge the Business Partner or End-User Customer for a standard initial Installation performed, as this is a way of assisting with the overall success of our solution and partnership.

If the Business Partner has chosen to do the End-User installation of UTG themselves, the information provided by our Installation Coordination services will enable them to do so. However, all Business Partners must participate in several Installations with Shift4's assistance prior to being able to perform installations without Shift4's involvement. If this is something your organization would prefer, please email installations@shift4.com for further assistance.

Training Services

(Must be completed 24-hours after end-user has gone live with Integrated Payment Processing services to ensure compliant credit card transactions)

After the Installation and Implementation of our combined solution, all customers require administrative and audit training on how to setup new user accounts and utilize DOLLARS ON THE NET.

Shift4's training staff will train all of our mutual customer to use DOLLARS ON THE NET, through telephone training. In addition, training tutorials and Online-Help are available on Shift4's websites for all customers and partners at www.shift4.com/tutorials.

The customers will be issued an account Administration password via email at the time the account is set up in our system. They must have this password in order to participate in the administrative portion of the training.

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Shift4 Customer Support

As a reminder, once the installation and training are complete, the customer's file and information is turned over to Shift4's Customer Support Department who are charged with ensuring that each and every customer is able to fully leverage our solution at all times. This service is provided to all customers without additional fees or charges. Shift4's DOLLARS ON THE NET customer support is the best in the industry. Qualified support personnel are available 24 hours a day, 7 days a week, 365 days a year to answer merchant questions about the operation of DOLLARS ON THE NET and the UTG to make sure electronic payment dollars get into their bank. Our support personnel are knowledgeable about both the interfaces and the processor, and can determine if a problem lies on either side of DOLLARS ON THE NET, with the third party software at the point-of-sale or with the processor.

If an issue requires intervention by the merchant's bank or processor, hardware support, or network support, Shift4 cannot determine how long the call and resolution will take. Shift4 will remain involved until it is determined where the problem lies.

Diagram of End-User Customer Setup

