worldpay
for platforms

Product solution guide

Power
the possible

Welcome to possibility

At Worldpay, every payment powers your progress – giving you and your merchants the tools to turn possibility into reality.

This guide is your shortcut to the essentials: the smartest ways to accept payments, optimize transactions, manage risk and expand your reach.

We keep it simple. You get the highlights and the benefits. Whether you're looking to tap into new markets, streamline payouts or embed finance with ease, you'll find what you need right here.

Ready to see what's possible? Let's get started.

1 Modernize payments acceptance
- In-person payments
- Mobile payments

2 Optimize embedded payments
- Payments optimization
- Gift and loyalty
- Payouts

3 Simplify risk
- Disputes management
- Fraud management
- Compliance management

4 Elevate embedded finance
- Embedded finance

5 Experience enhanced and expanding services
- North American market expansion | Canada
- International market expansion | Australia and UK
- Integrated payments merchant experience
- Digital partner experience
- Payrix Pro portal
- Embedded sales

Section 1
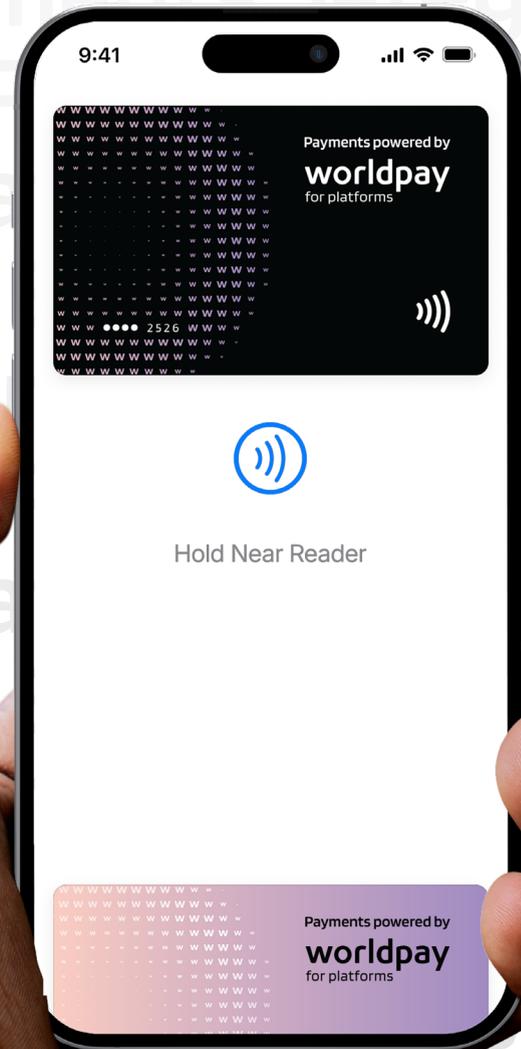
1 **Modernize payments acceptance**

- In-person payments
- Mobile payments

In-person payments

Modern devices for every setting and situation

The challenge

Merchants lose sales when payment hardware fails, doesn't support modern payment methods or can't adapt to different business environments. Partners struggle with device management complexity, integration headaches and merchants who demand modern, reliable point-of-sale experiences.

The Worldpay difference

– One-stop terminal management with dedicated partner success managers

– Service-based deployment – no direct KIF (key injection facility) interaction required

– POS device deployment platform for simple terminal orders

.

triPOS meets Android:

Frictionless integration options for a modern card-present offering:

triPOS All-in-one
Create your complete POS solution directly on an Android device, merging your business application with payment processing on a single handheld offering

triPOS Cloud
Connect to the suite of Android-based devices via the Cloud API for a modern, semi-integrated payment acceptance solution

triPOS Direct
Extend your existing direct integration to enable the suite of Android-based devices to modernize your semi-integrated payment acceptance solution

triPOS Local/Tethered
Develop a modern, on-premise solution leveraging Android-based devices without the need for locally deployed middleware

Deployment made easy via SightStream

A service-based approach to order, deploy, and service devices without needing to go direct to a KIF.

One stop for all things terminal

Support · Manage · Order

Your competitive edge

Offer best-in-class, out-of-the-box payment acceptance that just works – without you needing to manage the complexity.

How we solve it

Our comprehensive in-person payment hardware suite delivers modern devices for every setting, from compact desktop units to mobile "pay at table" tablets – backed by a mobile device management platform that keeps everything secure, compliant and up-to-date, remotely.

With multiple integration options – triPOS all-in-one, cloud, direct, and local/tethered – you can tailor solutions to any merchant need with minimal lift from your team.

Choose from:

Ingenico DX4000
Compact desktop solution for hospitality, retail, quick service, and professional services

Ingenico DX8000
Mobile "pay at table" solution with printing

Ingenico EX8000
Tablet-like solution ideal for retail

Ingenico RX9000
Advanced tablet-based checkout system

Ingenico RX7000
Fixed retail with signature capture

Verifone V660p
Mobile with printing capabilities

Verifone Victa Portable and Mobile
Compact, desktop and tablet-based solutions

Mobile payments

Accept digital payments anytime, anywhere

Stay ahead in today's fast-paced marketplace with innovative mobile payment solutions that can drive customer engagement and unlock more revenue opportunities.

Partnership payoff

Offer merchants more frictionless, secure and flexible payment experiences that can turn smartphones into powerful payment terminals, **driving both merchant satisfaction and your recurring revenue.**

Demand for mobile payments is growing

Global mobile payment market is projected to reach **$588 billion by 2030***

More than half of all U.S. consumers now use digital wallets more frequently than cash or cards*

By 2026, mobile payments will account for more than **80% of all digital transactions***

*Grand View Research Embedded Finance Market Report (2024-2030)

Features:

Customer-centric experience: Mobile-first, intuitive payment options enhance satisfaction

Omnichannel flexibility: Expand acceptance across channels and customer segments

Accelerated revenue: Speed up collection and reduce operational complexity

Automated billing: Streamline with Text-to-Pay and Tap to Pay on iPhone

Proven results: 72% of payments received within 24 hours via Text-to-Pay

Immediate enablement: No additional hardware required for Tap to Pay on iPhone

Enable customer-centric payments

Enhance customer experience with intuitive mobile-first options

Expand payment flexibility across channels and customer segments

Accelerate time-to-revenue while reducing operational complexity

Tap to Pay on iPhone

Accept contactless payments with only an iPhone via an easy-to-use SDK

Text-to-Pay

Modernize your billing, payment, and engagement experiences via text

Access pre-built tools to drive adoption

We've developed customizable enablement tools to help you drive adoption of Text-to-Pay across your merchants. Tools that give partners and merchants a clear advantage from day one:

- Partner marketing playbooks
- One-pagers
- Infographics

- Communications kits
- Sales decks
- And more...

Section 2

2 **Optimize embedded payments**

- Payments optimization
- Gift and loyalty
- Payouts

Payments optimization
Unlock services that can maximize authorization and minimize cost

Without optimization vs. with optimization

The problem	The solution*
?	✓
Lost revenue from declined transactions	Intelligent routing increases authorization rates
High processing costs eat into margins	Smarter processing lowers transaction expenses
Recurring payments fail due to expired cards	Automatic account updater protects subscription revenue
Customer frustration from declined legitimate purchases	Reduced friction leads to higher satisfaction and retention

*Features may vary based on integration.

Your partner advantage

Transform payment performance with configurable optimization that increases authorization rates, reduces costs and protects recurring revenue streams. Your merchants can get:

- Higher conversion and more successful transactions
- Lower operational and processing expenses
- Protection against up to 40% of subscription churn caused by payment issues
- Improved customer experience with fewer declines

Bottom line: Payments optimization: It's not optional – it's essential. It's the difference between losing revenue and maximizing it.

Protect recurring transactions with account updater

- Updated card details
- Minimize service interruptions
- Reduce declines and lost revenue
- Boost customer retention

Optimize transactions with managed network payment tokens

- Built-in network payment tokens
- Increase authorization rates and reduce costs with auto-retries
- AI-driven platform driving smart token usage
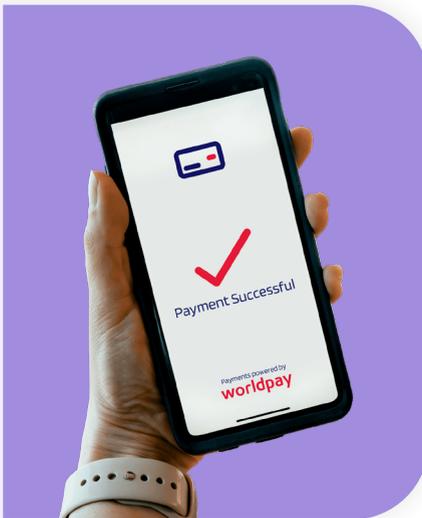
Choose payments optimization

Goal	Solutions	Results
Increase authorization rates	Account updater	Higher sales through better conversion
Reduce payment costs	Managed network payment tokens	Lower operational and transaction costs
Protect recurring payments	Retry logic	Improved end customer experience

Gift and loyalty

Strengthen customer loyalty: The gift that keeps on giving

Real-world scenario

Picture a local coffee shop owner who's competing with national chains. She knows her regulars by name, but there's no easy way to reward their loyalty or attract new customers during slow seasons. Holiday sales could double if she had gift cards, but managing a program seems overwhelming.

The Worldpay advantage

With our flexible gift card and rewards platform, she launches a digital loyalty program in days – no complex setup required. Customers earn points with each purchase, redeemable for free drinks. During the holidays, gift card sales bring in new customers who become regulars. The platform is designed to work seamlessly across mobile app, in-store POS, and online ordering.

What you can offer

Deliver a comprehensive gift card and loyalty solution that helps merchants attract new customers, encourage repeat visits and build lasting brand loyalty, all integrated across digital, physical and mobile channels.

Quick wins

- **Increase retention:** Personalized rewards can foster repeat business and long-term loyalty

- **Drive revenue:** Gift card programs can open new sales channels, including seasonal campaigns

- **Simplify management:** User-friendly tools can make setup and tracking effortless

- **Gain insights:** Robust analytics can optimize marketing and reward strategies

64% of U.S. consumers buy gift cards as holiday gifts

52% of consumers purchase gift cards because they are convenient

55% of consumers spend more than a gift card's value when redeeming

Digital and mobile gift cards

Customers can convert their physical gift cards into digital versions that can be saved to their mobile wallet.
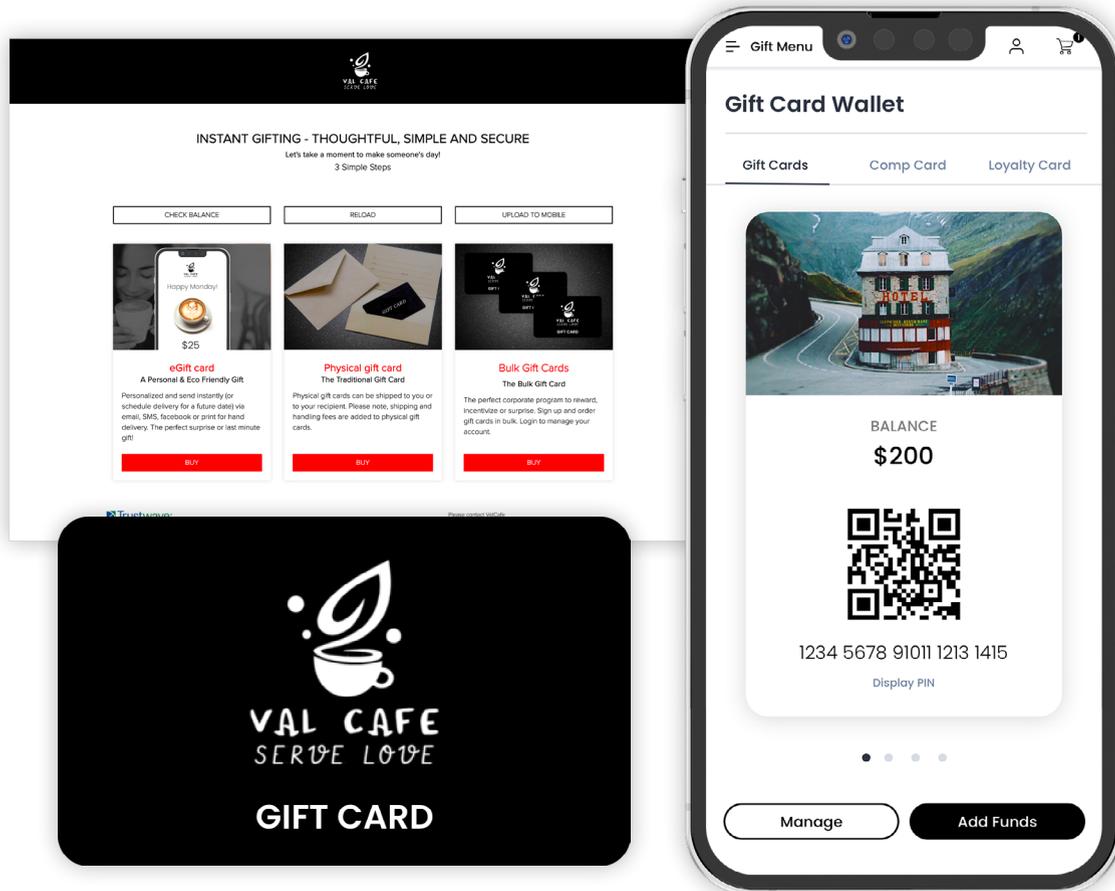
Gifts and prepaid cards

- Digital, physical, mobile
- Auto-reload cards
- SKU/experiences cards
- B2B bulk gift cards
- Marketplaces
- Merchandise return cards
- Appeasement gift cards
- Charity gift cards
- Event ticketing gifting

Drive engagement

- Customer/ employee incentives
- Birthday/anniversary
- Surprise and delight
- VIP
- Coupons
- Bogos
- Discounts
- Geo-fenced offers (with app)

Strengthen loyalty

- Onsite, online, mobile app
- Points
- Stamps
- Custom
- Tiers/memberships
- Referrals
- Miss you
- Gamification, badges, nudges
- Extensive reward catalog
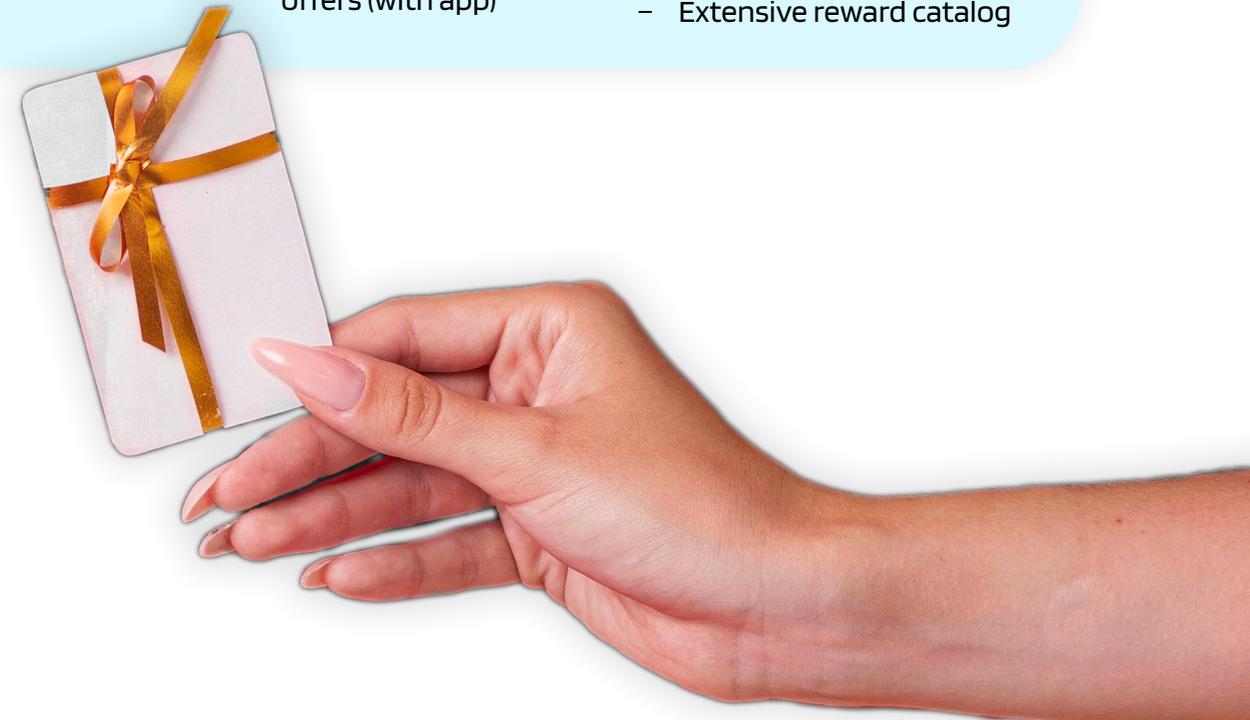
Payouts

Payout solutions tailored to your business

Delivering fast, reliable and customizable payout experiences is essential for optimizing merchant satisfaction and operational efficiency.

Features:

$ Optimize cash flow
Liquidity solutions ensure merchants can access funds when needed, supporting growth

↗ Simplify operations
Consolidated management can reduce vendor complexity and streamline compliance

⊘ Reduce delays
Same day, next-day and instant payout options minimize waiting times

24/7 365 Enhance reliability
High straight-through processing and 24/7 availability can deliver uninterrupted service

Partnership payoff

Help merchants maintain healthy cash flow with flexible payout timing that matches their business needs, building loyalty and reducing friction in your platform experience.

Managing payouts today is a challenge

Legacy payouts are slow and can take several days to settle
After a payment is instructed, it can take considerable time to reach the beneficiary account or card

Merchants require tailored funding solutions
Depending on the merchant's business needs – funding speed, frequency, and type needs to flex

Maintaining compliance can be complex
MTLs can be difficult to obtain and maintain. Navigating compliance can be risky given different regions and countries have their own standards

Relying on multiple vendors is expensive and inefficient
Relying on multiple vendors can be inefficient and require complex data management, as each vendor has their own fees and requirements

Payouts that are fast and flexible for every partner

Liquidity
Optimize cash flow

Speed
Reduce delays

Access
Deliver funds when and where they're needed

Integrated payments

Payout options:

Standard funding: T+2

Next day ACH: T+1

Same day ACH

FastAccess Funding

What's next:

Everyday funding

Daily payouts including weekends and holidays

Payrix Pro

Payrix Pro's turnkey payout and billing solution is available through a portal or API access.

Payout options:

Standard funding: T+2

Next day: T+1

What's next:

Vendor payouts

Faster funding and later cut-off

PayFac®

Payout options:

Standard funding: T+2

Next day ACH: T+1

Vendor credits

FastAccess Funding

What's next:

Instant payouts to bank accounts

Payouts to embedded finance accounts, wallets, additional instant payout rails and more

Section 3

3 **Simplify risk**
- Disputes management
- Fraud management
- Compliance management

Disputes management
Automated chargeback protection for modern platforms

The challenge

Chargebacks drain revenue and consume valuable operational resources. Manual evidence compilation is time-intensive, error-prone and often results in low win rates. First-party fraud and digital confusion are rising, making it harder to distinguish legitimate disputes from friendly fraud.

Chargebacks are surging and costing you revenue

Global chargeback volume will hit **261M in 2025**, growing to **324M by 2028**.

45% of chargebacks are fraudulent, driven by first-party fraud and digital confusion.

U.S. merchants lose **$110 per chargeback on average** — and many don't fight back.

74% of disputes become chargebacks, yet merchants win 54% of those they challenge.

Chargeback management consumes up to 20% of ops budgets

Revenue risk

Confusion
Customers don't recognize transactions and file disputes

Fraud
45% of chargebacks are fraudulent – and rising

Operational drain

Time drain
Handling manual disputes eats up ops budgets

Lost revenue
Most merchants don't respond to chargebacks and lose money

Disputes

Resolve disputes

How we solve it

Disputes Defender provides automated chargeback protection that compiles evidence and submits responses on behalf of merchants – with zero integration requirements. Our AI-driven system adapts disputes based on industry-specific patterns and learns from outcomes to improve win rates over time.

The impact

For your merchants:

– Automated evidence compilation can help recover lost funds and boost win rates

– Real-time tracking can provide clear visibility into dispute progress

– AI-driven disputes can combat first-party fraud effectively

For your business:

– Turnkey activation can free up operational resources

– Zero integration requirements can mean faster deployment

– Reduced merchant churn from better disputes outcomes

+30% win rate uplift in pilot programs

340% more revenue recovered by one client

76% of merchants rate third-party tools as highly effective

AI that fights chargebacks for you

Data
Uses 500+ data points, trained on billions of transactions

Visibility
Tracks real-time case progress in the iQ portal

Defense
Builds dynamic, dispute-specific arguments

Expertise
Adapts to your industry's dispute behavior

Supports all verticals - retail, SaaS, travel, ticketing and more

Fraud management

Real-time fraud protection for modern platforms

Without advanced fraud protection vs. with FraudSight

The problem ?	The solution ✓
Fraud drains revenue through chargebacks and scheme fees	AI-powered prevention stops fraud before authorization
Manual reviews slow transactions and frustrate legitimate customers	Real-time decisioning approves good customers instantly
New fraud tactics emerge faster than teams can adapt	Behavioral analytics and expert oversight stay ahead of threats
Integration projects drain developer resources for months	Zero integration required, protection activated in hours

Why it matters

Merchants don't just need fraud protection, they need protection that doesn't sabotage their sales. Our fraud detection platform uses machine learning trained on 40+ billion annual transactions to maximize approval rates for legitimate transactions while blocking bad actors. With a team of data scientists and fraud experts continuously monitoring trends, your merchants can benefit from enterprise-grade protection without enterprise-level complexity.

Your partner advantage

Deliver advanced fraud defense that's powerful enough for large-scale operation, yet simple enough for merchants to adopt quickly and use confidently. Your merchants can get:

– Revenue protection from day one

– Actionable intelligence from expert fraud analysts

– Deployment in hours with no technical lift

Real results: 99.96% reduction in network declines for platform partners*

* Data based on internal analysis of transactions processed by Worldpay's fraud prevention team, using proprietary Worldpay data.

Bottom line: Fraud protection that protects both security and the customer experience is essential.

The impact
FraudSight stops attacks before they escalate

99.96% reduction*
in network declines

13,000 MIDs enabled overnight to stop a POS fallback fraud ring

Significant drop in **chargebacks**

AI+data+experts = smarter fraud defenses

Data
40B+ annual transactions training our fraud models

Technology
Real-time machine learning with behavioral analytics

Expertise
Data scientists and fraud teams monitoring trends and tuning strategies

Meet FraudSight

Worldpay's fraud decisioning engine

– **Scores transactions in milliseconds** using sophisticated machine learning models

– **Stops fraud before authorization,** protecting merchants and networks

– **Requires zero integration** — deployable in hours

– Balances fraud prevention with **99.7% approval rates*** for good traffic

Access pre-built tools to drive adoption

We've developed customizable enablement tools to help you drive adoption of FraudSight across your merchants

– Partner marketing playbooks
– One-pagers
– eBooks

– Communications kits
– Sales decks
– And more…

* Data based on internal analysis of transactions processed by Worldpay's fraud prevention team, using proprietary Worldpay data.

Compliance management

A comprehensive PCI compliance solution protecting your business and your merchants

How do I keep my platform and merchants PCI compliant without drowning in complexity?

That's the question most payment platform partners ask, and for good reason. PCI DSS compliance is mandatory, evolving, and operationally demanding. One breach can devastate your reputation and your merchants' businesses.

The answer: SaferPayments

We handle PCI compliance for your entire platform and merchant base so you don't have to become compliance experts. SaferPayments provides:

– **Continuous compliance monitoring** that can adapt to evolving PCI DSS regulations

– **Automated security controls** that can reduce breach risk across your merchant network

– **Simplified processes** that can minimize manual effort for you and your merchants

– **Expert support** so compliance questions get answered quickly

Why partners choose SaferPayments

Differentiate your platform with security-first positioning that can build trust

Reduce operational overhead by offloading compliance management to specialists

Future-proof your business against regulatory changes

Protect your reputation with robust safeguards against cyber threats

Bottom line: Compliance doesn't have to be your full-time job. With SaferPayments, you can get peace of mind and more time to focus on growth while your merchants stay secure.

SaferPayments by Worldpay

Simplified compliance. Real protection.

– Self-service portal for merchants

– White-label marketing kit for partners

– Quarterly ASV scans and breach support

– 24/7 support via VikingCloud

Why does PCI compliance matter?

To protect your platform, your merchants, and customer data.

1 in 3 SMBs experienced a cyberattack last year

98% Merchants who experienced fraud in 2025

55% Merchants would go out of business with just $50k in losses

The impact of SaferPayments

Reduce risk
Limit breach risk for your merchants, leading to a safer experience for all

Security first
Differentiate your platform and protect your reputation

Look ahead
Future-proof compliance with PCI DSS regulations

Access pre-built tools to drive adoption

We've developed customizable enablement tools to help you drive adoption of SaferPayments across your merchants

Section 4

4 **Elevate embedded finance**

- Embedded finance

Embedded finance

Working capital | Checking and savings accounts | Debit cards

Real-world scenario

Imagine a SaaS platform serving small businesses. Their customers love the software but constantly ask: "Can you help with funding?" "Where should I bank?" "How do I get a business debit card?"

The platform wants to help but building financial services from scratch would take years and millions of dollars.

The Worldpay advantage

In less than a sprint, you can deliver financial services with our embedded finance solution including working capital loans, business checking*** accounts and debit cards***. One API call and three lines of HTML integrate pre-built financial products powered by best-in-class partners like Unit for banking. The platform becomes an "everything hub" where businesses not only manage operations but can also access the financial tools they need, all without leaving the platform.

The result?
4x increase* in customer lifetime value and 2-5x more revenue per user**.

Payments powered by
worldpay

Total
159.99

Pay by card

 Pay
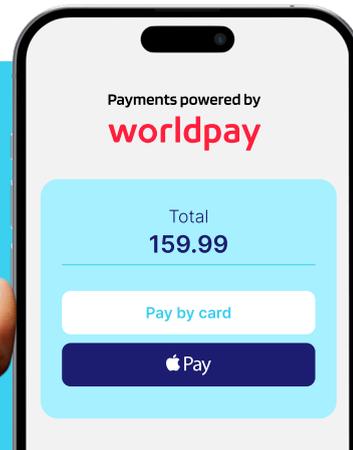
What you can offer

Transform your platform into an all-in-one financial hub by embedding working capital, banking, and card solutions directly into your experience. This can empower you to deliver financial services in days, not months.

- **Working capital loans**: Fast, flexible funding for your merchants
- **Business banking**: Checking and savings accounts powered by Unit (2M+ users, $50B+ annual transaction volume)
- **Debit cards**: Physical and virtual cards for business spending

Quick wins:

- **Accelerate growth**: Launch in days with minimal development – one API, three lines of HTML
- **Boost loyalty and revenue**: Increase customer lifetime value up to 4x
- **Simplify operations**: Pre-built, composable technology with best-in-class partners
- **Future-proof ecosystem**: Stay competitive with a full suite of embedded finance solutions
- **Operational support**: Expert guidance in compliance, lending, accounts and cards

*Unit case study

**The Paypers Embedded Finance and Banking-as-a-Service Report 2024

***Coming soon

Accelerate growth without disruption

API 1 API call   **HTML** 3 lines of HTML

It's that simple!

End fragmented finance with built-to-launch embedded finance and become their everything platform

Working capital loans
Fast, flexible funding

Business banking
Checking and savings accounts

Debit cards
Physical and virtual debit cards

Enablement support

We've developed customizable enablement tools that can help you drive adoption across your merchants, including partner marketing playbooks, one-pagers, infographics, communications kits and sales decks. These tools give partners and merchants a clear advantage from day one.
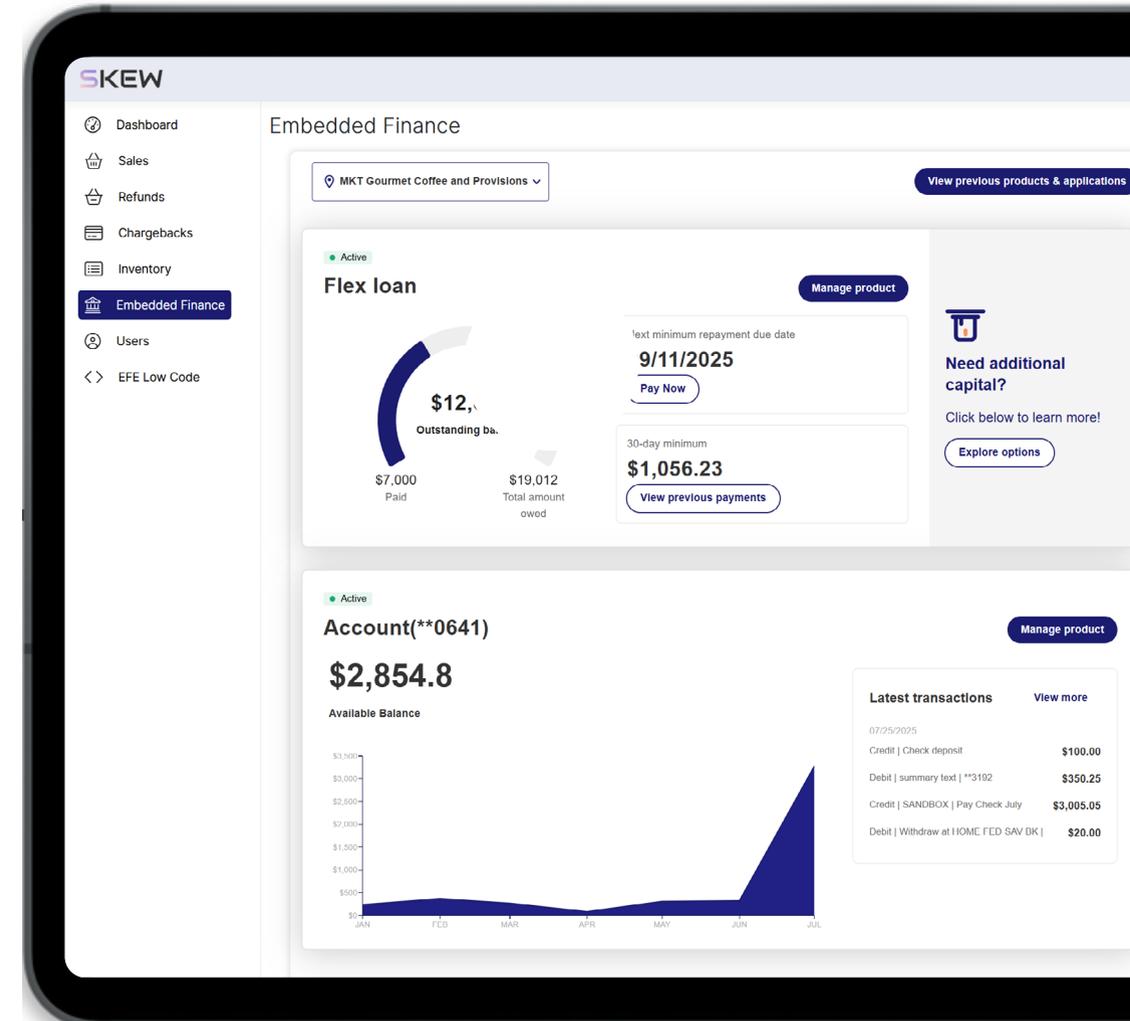
Section 5

5 Experience enhanced and expanding services

- North American market expansion | Canada
- International market expansion | Australia and UK
- Integrated payments merchant experience
- Digital partner experience
- Payrix Pro portal
- Embedded sales

North American market expansion | Canada

Omnichannel payments, one provider

U.S. operations vs. U.S. + Canada operations

Single market:	Cross-border expansion:
Limited growth potential constrained to U.S. geography	Access to 40+ million affluent Canadians (9th globally in GDP per capita*)
Multiple processors:	Single processor:
Complex vendor management, dual integration work	Streamlined operations using one platform for both countries
Compliance guesswork:	Compliance confidence:
Navigating Canadian regulations without expert support	Expert guidance can minimize risk and accelerate market entry
Currency friction:	Native CAD support:
Manual currency conversion creates customer friction	Omnichannel payments in Canadian dollars can enhance customer experience

Why it matters

Canada isn't just geographically adjacent – it's economically attractive. Ranking 8th globally in both point-of-sale ($862B) and e-commerce ($103B) market size,* Canada represents a massive, accessible growth opportunity with minimal barriers to entry.

Your partner advantage

Unlock new possibilities with a simple, flexible and scalable payments solution. You can gain:

– Access to a large, affluent market with strong e-commerce growth
– Streamlined operations using one processor for both countries
– Expert compliance support reducing risk and accelerating entry
– Omnichannel payments supporting both in-person and online in CAD
– Device flexibility and easy onboarding for faster go-to-market

* Canada and the IMF

Canada omnichannel experience

Worldpay for Platforms now supports Canadian processing across Integrated Payments, Payrix Pro and PayFac segments

Accept payments in Canadian dollars (CAD) in-person and online

Transactions and payouts in Canadian dollars (CAD)

Interac in-store for debit transactions

Worldpay for platforms Canadian offering

Leverage triPOS for device flexibility and easy deployment

Online

AMEX   mastercard

VISA   DISCOVER

Apple Pay   G Pay

EFT/eCheck

In-person

AMEX   mastercard

VISA   DISCOVER

Apple Pay   G Pay

Interac

Features

- Omnitoken
- Account updater
- L2/L3 processing

8th   **POS size:** $862 billion

8th   **E-com size:** $103 billion

9th   **GDP per capita:** $54,966

22nd   **Population:** 40.1 million

International market expansion | Australia and the UK
Omnichannel payments, one provider, one integration

Access new possibilities in Australia and the UK with a streamlined, flexible and scalable payments solution. Benefit from a unified platform that can simplify integration, compliance and operations.

Why it matters

Expand your addressable market across three of the world's most attractive English-speaking economies – with one integration, expert local support, and minimal complexity.

Features:

📈 **Unlock growth in high-potential regions**: Tap into software-led payments markets with significant revenue share and double-digit growth projections

🌐 **Simplify global payments**: Manage transactions across three major markets with one integration

📍 **Enjoy local expertise**: Experience real-time reporting, digital onboarding, and fast payouts with local support

🤝 **Minimize operational barriers**: Low regulatory lift and no language barriers for smoother entry

🎧 **Receive dedicated support**: White glove service and centralized payments management

What can you expect?

🔀 Single integration

🎧 White glove support

⚖️ Low regulatory lift

🗨️ No language barrier

Why expand now?

One platform. More possibility.

2023
29% → **2028** 40%
Revenue share of
software-led payments

$60b
ISV-led gross
payment volume in 2023

18%
Growth in
ISV-led payments
Set to double by 2027

Three markets.
One integration.

Worldpay for Platforms UK and Australia offering

Leverage triPOS for device flexibility and easy deployment

Online	In-person	Features
AMEX MasterCard	AMEX MasterCard	– Omnitoken
VISA DISCOVER	VISA DISCOVER	– Account updater
Pay G Pay	Pay G Pay	– L2/L3 processing
EFT/eCheck	Interac	

Integrated payments merchant experience
New iQ SMB portal | Launchpad | Seamless self enrollment | Fast launch

Real-world scenario

Picture a merchant who just signed up for your platform. They're eager to start processing payments but dreading the typical onboarding nightmare: confusing portals, endless support tickets and days of waiting for account approvals. They want the payment experience to be as modern as your core software.

The Worldpay advantage

With our next-generation digital tools, merchants can complete setup in minutes, not days. The self-service portal is intuitive and can be branded to your platform. Your merchants can manage disputes, handle taxes, add team members and view analytics without ever leaving your ecosystem or contacting support. The experience can feel seamless, modern and empowering.

What you can offer

Make it simple for merchants to get started and succeed with a centralized portal for managing payments, reporting and analytics.

Quick wins:

– **Accelerate merchant activations:** Digital-first tools enable quick setup and onboarding

– **Improve operational efficiency:** Provide self-service options for disputes, user management and tax

– **Increase brand loyalty:** Modern, intuitive experience helps merchants take control

– **Streamline onboarding:** Embed account sign-up directly in your portal

– **Reduce manual intervention:** Enable merchant-owned journeys with minimal sales rep involvement

How it works for your merchants:

Sign up and login
Sign application, create login credentials and immediately access iQ

Track and upload
Track application status, set notification preferences and upload underwriting documents

Get approval
Approval triggers access to key features (payment credentials, device tracking, support scheduling, etc.)
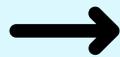
Start processing
Begin accepting payments and managing business

How it works for your platform:

Configure experience
Partner with Worldpay to develop a customized experience for your merchants

Add URL
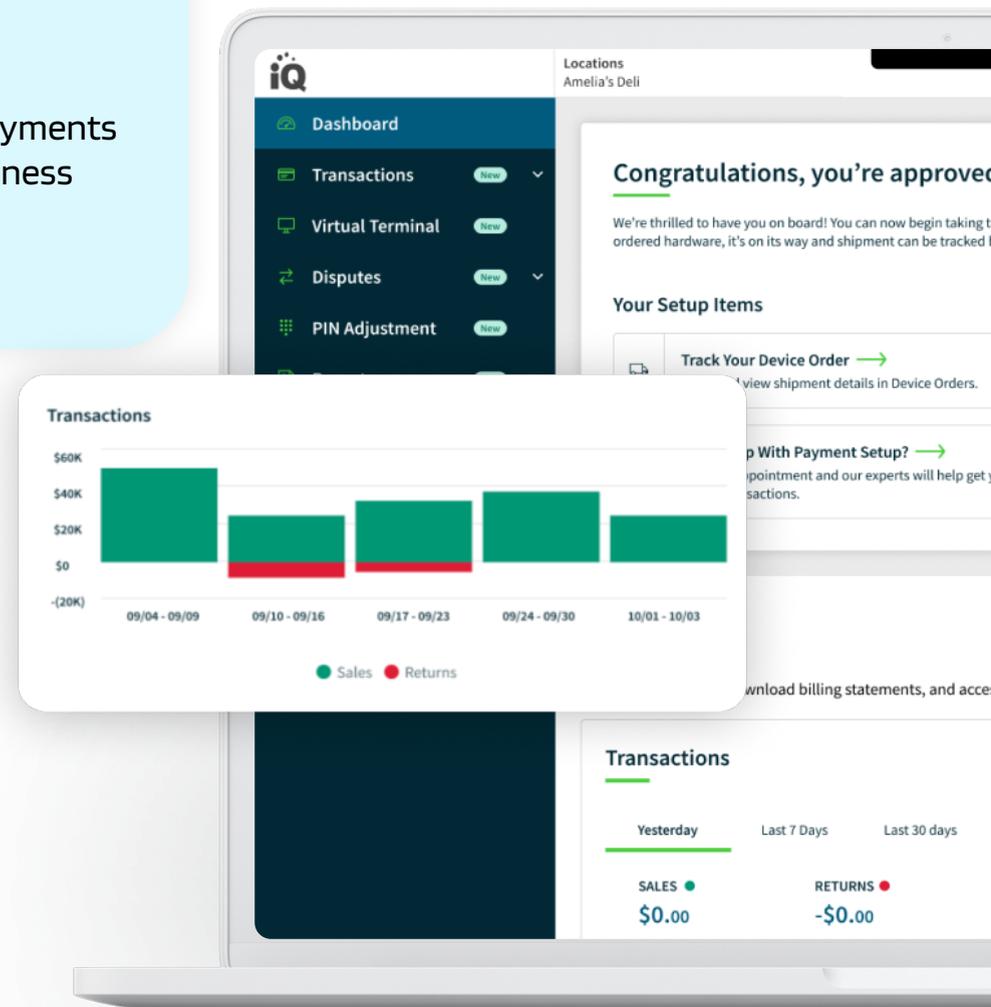Add the URL to your website or portal

Merchant enrolls
Merchants complete a simple and easy application process

Start processing
Merchants move into the Fast Launch experience to track their account boarding

iQ

Locations
Amelia's Deli

Dashboard
Transactions   New
Virtual Terminal   New
Disputes   New
PIN Adjustment   New

Congratulations, you're approved
We're thrilled to have you on board! You can now begin taking
ordered hardware, it's on its way and shipment can be tracked

Your Setup Items

Track Your Device Order →
view shipment details in Device Orders.

p With Payment Setup? →
pointment and our experts will help get
sactions.

Transactions

$60K
$40K
$20K
$0
-(20K)
    09/04 - 09/09   09/10 - 09/16   09/17 - 09/23   09/24 - 09/30   10/01 - 10/03

● Sales ● Returns

wnload billing statements, and acce

Transactions

Yesterday   Last 7 Days   Last 30 days

SALES ●   RETURNS ●
$0.00   -$0.00

Digital partner experience

Empowered access to knowledge and solutions 24/7

## What support do I actually get as a partner?

It's a fair question and one that determines whether your partnership thrives or frustrates. You need more than just a payment processor – you need empowered access to knowledge, solutions and support available 24/7.

The answer: Digital-first partner support

Take control of your payments journey with a digital-first experience that can streamline onboarding, service and ongoing management – available whenever you need it.

What you get

– **24/7 resource access**: Product guides, release notes, tutorials and operational workflows anytime

– **Faster issue resolution**: Intelligent ticketing and AI-powered assistance for quick answers and expert support

– **Stay informed**: Curated notifications and guides to common questions keep you updated

– **Develop your team**: Dedicated learning platform with payments education and role-specific training
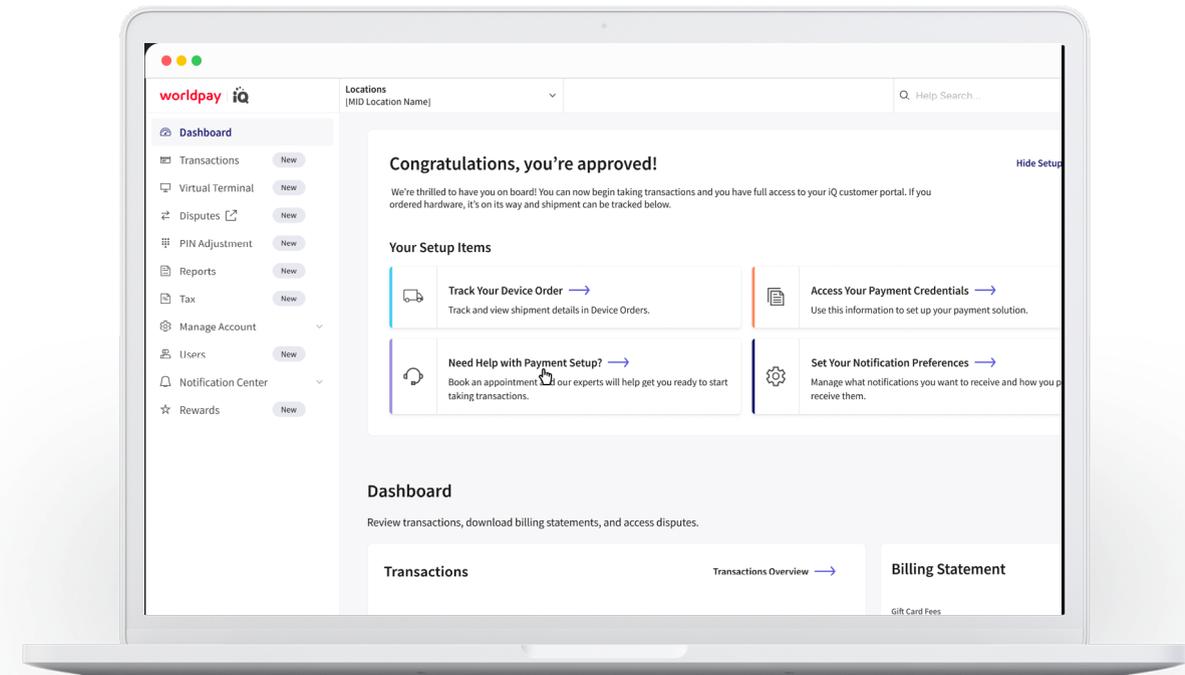
Empower your team with the knowledge and tools they need to succeed without waiting for business hours or navigating phone trees.

Now, you're in control:

Enhanced resource center

– Product guides
– Release notes
– Use cases and tutorials
– Reporting and data field explanations
– Operational workflows

AI assistance

– Suggested knowledge articles
– Curated guides to common questions

Intelligent ticketing

– Automated ticket assignment to relevant expert
– Continuous feedback loop via CSAT survey

Worldpay university

– Dedicated learning and development platform
– Payments 101
– Role-specific training

Worldpay University

Access on-demand payments education and role-based training

For developers

Learn how to use our APIs, developer tools and documentation to implement payment features.
What's included:
– Payment basics
– Integration walkthroughs
– Feature demos
– Guided configuration

For sales and marketing

Learn how to position, promote and launch embedded payments as part of your product offering.
What's included:
– Payment basics
– Marketing toolkit
– Migration strategies
– Merchant activation playbook

For support operations

Learn everything you need to assist the merchants using your platform with common payment tasks and tools.
What's included:
– Payment basics
– Merchant experience demo reporting and disputes
– Payment acceptance and funding

Payrix Pro portal

## Advanced portal for payment management, reporting and partner enablement

Run your payments business with greater efficiency and insight through an all-in-one portal designed to simplify onboarding, enhance reporting and support embedded finance.

Partnership payoff

Gain streamlined processes, actionable data and flexible financial tools to operate and grow with confidence – all from one powerful portal.

Insights at a glance

New dashboard and monitoring metrics for your portfolio growth.
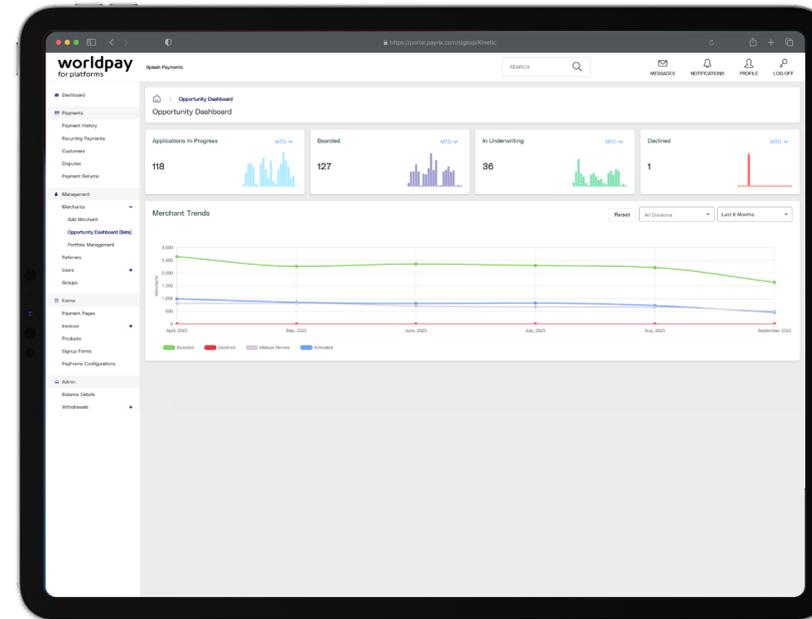
Features

Accelerate merchant onboarding*: Guided, automated experience can streamline setup and speed up payment acceptance

Reduce compliance friction: Automated risk reviews and document handling can minimize manual steps

Gain actionable insights: Comprehensive reporting can deliver clarity on transactions, revenue, billing and chargebacks

Monitor portfolio growth: Dashboards and metrics can track performance and identify opportunities

Manage embedded finance: Control working capital loan enablement and analyze revenue from funded loans

*Available early 2026

Reporting aligned to industry best practices

A comprehensive suite of financial reports to improve clarity and enhance usability for merchants and partners. Payrix Pro financial reporting suite:

Submitted and settled transactions
Transaction volume submitted by merchants/partners

Funded transactions
Transaction volume that is paid out to merchants/partners

Revenue and billing
Understand the fees merchants pay and the revenue you generate

Chargebacks
Chargeback activity and status for merchants/partners

Payrix Pro merchant onboarding*:

Complete sign-up form
- Pre-fill onboarding data
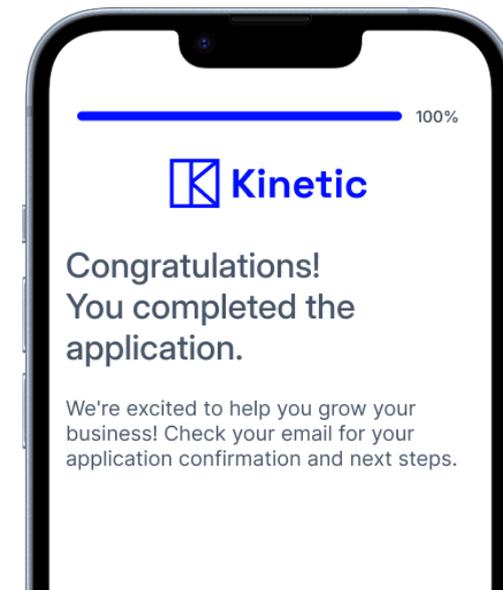- Entity specific sign-up forms
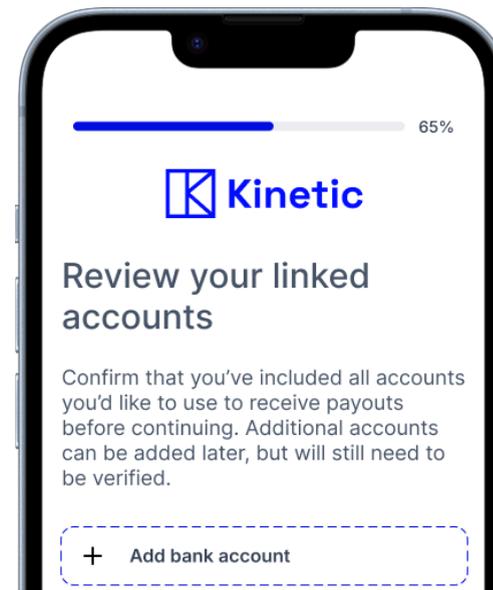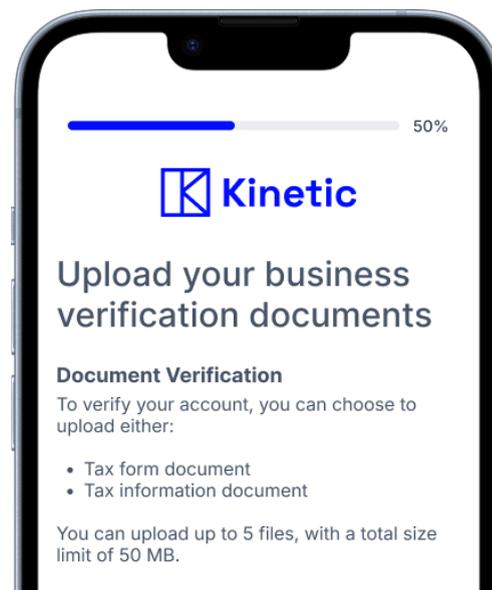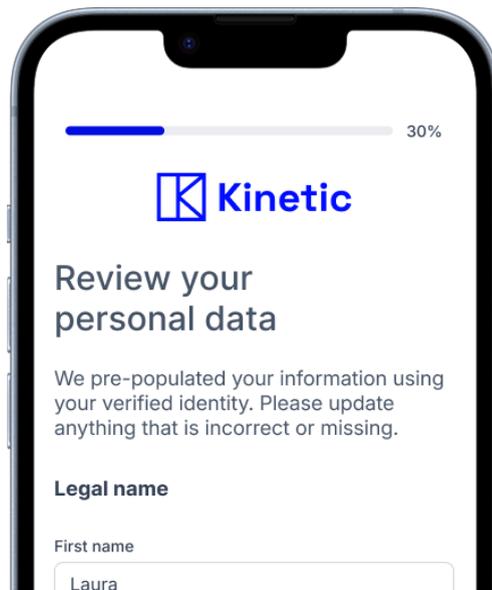- Step-by-step guided experience

Upload documents
- Automated document handling when needed
- Secure public upload links
- Easily view and manage uploaded documents

Risk review
- Automated compliance and risk checks
- Instant business and risk assessments

Accept payments
- Merchant account activated and ready to accept payments

*Available early 2026

Embedded sales

Sales as a Service for achieving higher payments adoption

The challenge

You've built embedded payments into your platform, but adoption rates disappoint. Merchants don't understand the value, sales teams lack expertise and marketing campaigns fall flat. Low penetration means missed revenue and reduced platform stickiness.

How we solve it

Our Sales as a Service (SaaS) approach provides a dedicated merchant sales team, outbound campaigns and partner manager collaboration designed specifically to drive payments adoption. We don't just hand you a product – we help you sell it effectively.

The impact for your business

– Boost payments adoption across your merchant base

– Increase revenue and improve client stickiness

– Gain insights into what motivates merchant adoption

– Leverage specialized sales support and outbound campaigns

Why choose embedded sales*

Increase revenue
Help drive higher adoption of payments across your merchants

Drive retention
Increase embedded payments penetration and client stickiness

Gain insights
Learn what motivates merchants to adopt or hold off on embedded payments

*Embedded sales is currently available to IP and Payrix Pro segments.

Your competitive edge:
Turn embedded payments from a feature into a revenue driver with expert sales support that understands the unique challenges of platform adoption.

How embedded sales works

Leverage our best-in-class payments expertise customized to your unique needs

1 Scope

– Portfolio optimization to expand revenue and increase integrated payments attach rate

2 Initial planning

– Consulting on campaign cadence, launch timing and total duration
– Evaluate the opportunity and TAM

3 Marketing

– Create an offer to drive urgency and incentive to switch
– Draft initial email blast and set up drip campaign

4 Training

– Develop an effective outbound strategy by defining ICPs, buying personas, outreach messaging and processes
– Demo the software and review value points, talk tracks, and GTM pricing

5 Launch

– Kick-off and regular cadence calls for campaign review
– Provide reporting of metrics and insights to your merchant base

worldpay
for platforms

Ready to power the possible?

Every solution in this guide is designed with one goal – to help you deliver exceptional payment experiences while growing your business. From modern hardware to embedded finance, from fraud protection to global expansion, we're here to turn payments into your competitive advantage.

Contact your strategic partner manager

Your dedicated strategic partner manager is ready to discuss which solutions are right for your platform and help you get started quickly.

Let's power the possible together.

platforms.worldpay.com

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