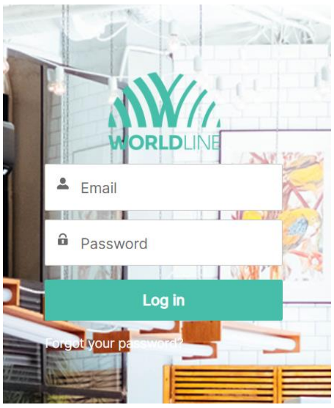
1. How do I log in to Partner Community?

Link to Partner Community: [Home (bambora.com)]

Username is you email address.

When you have created a user you will get an email from Salesforce with a link. By clicking this link you will be able to create a password and activate your user. The link will be active for 72 hours after you receive it.

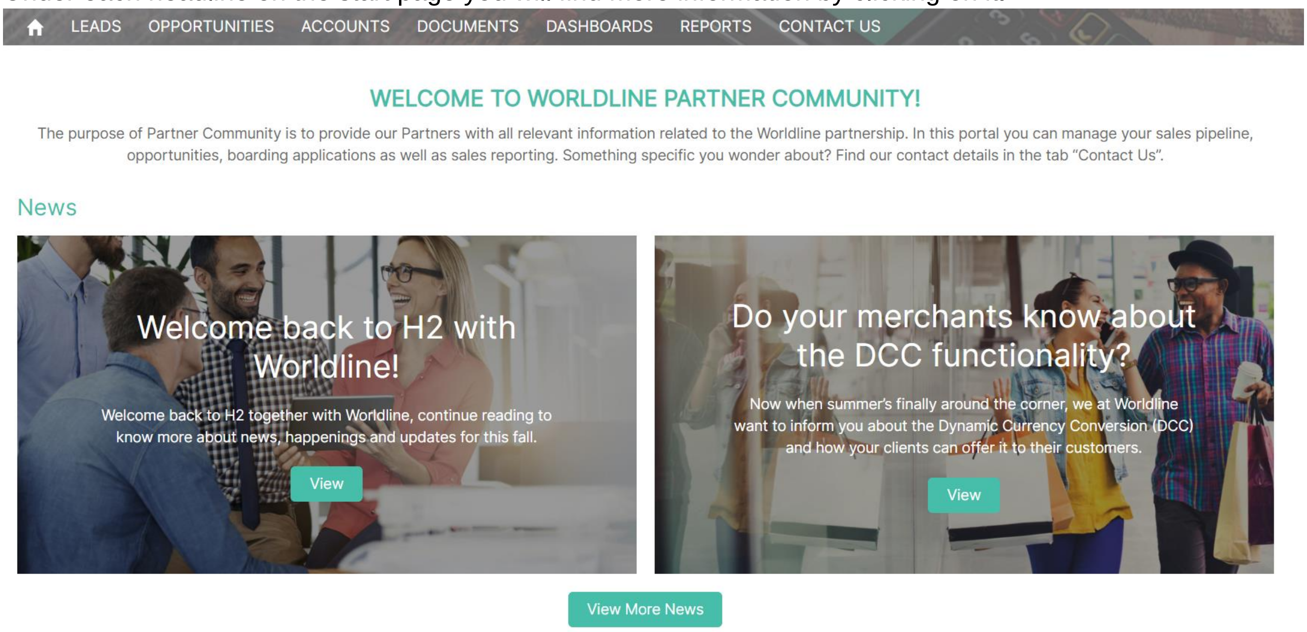
If you don't receive an email with a link, or if it's no longer active, you can always contact Partner Service.



2. Partner Community start page

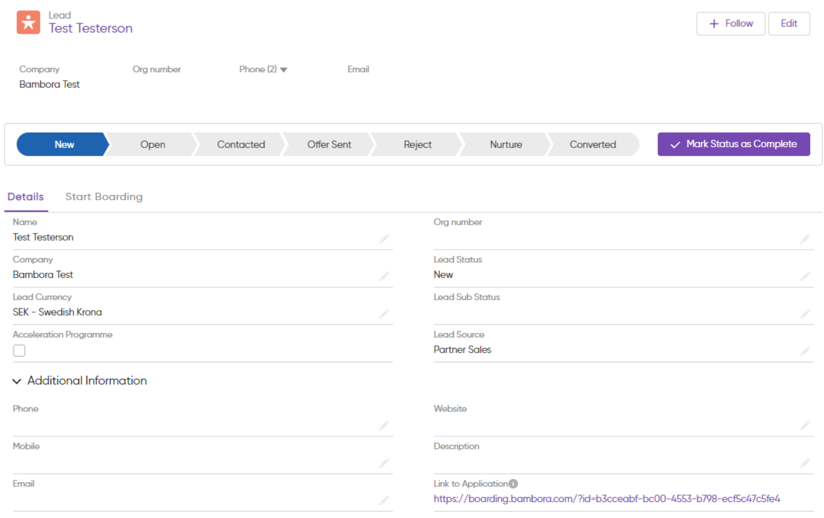
By visiting the start page you will easily get an overview. From the start page you will be able to find you latest shown leads, accounts and opportunities. There is also a field where you can see what activities that needs your attention, on opportunities for example. You can also see news and documents uploaded by Worldline.

Under each headline on the start page you will find more information by clicking on it.



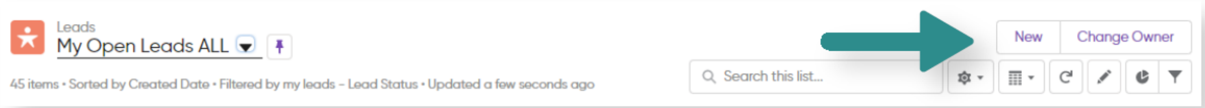
3. Leads

In the leads menu you can see all your leads created and information on each customer. You can always add or change information on each customer. You can see what status each lead has here.

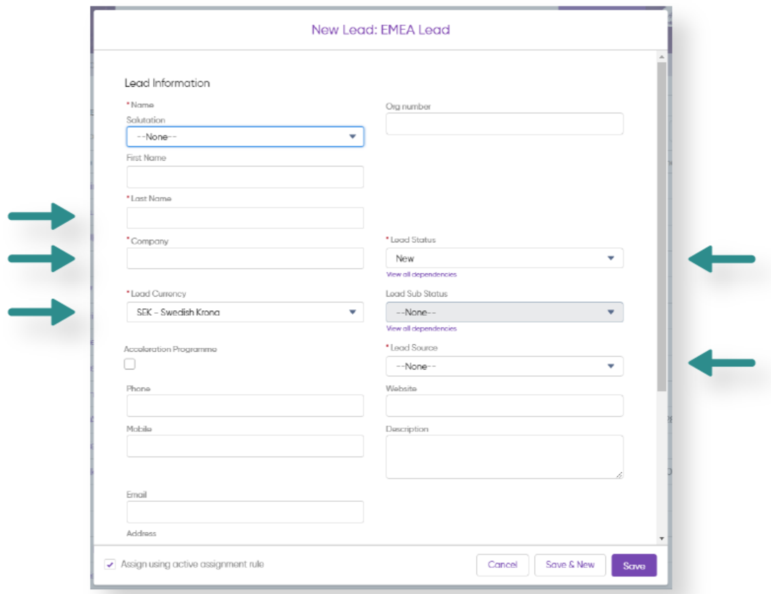


3.1 Creation of a new lead

To create a new lead, click on “New” under “Leads”



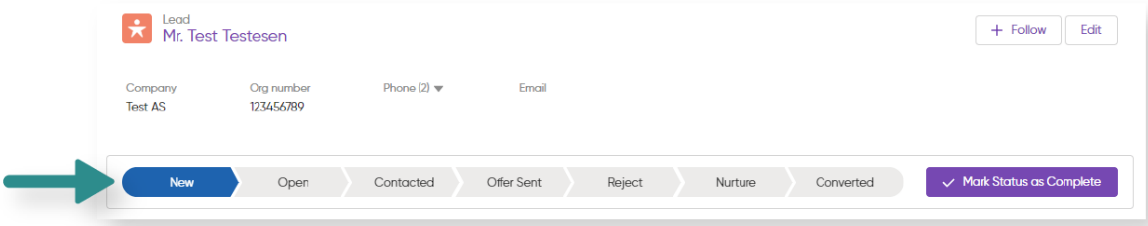
When you create a new potential customer some information is mandatory and some information is voluntary to add. The mandatory fields will be used when onboarding a new customer, if they chose Worldlines solution. Fields that are mandatory are marked with a (*).



When a lead is created “lead source” always needs to be “Partner sales”. This helps us to track and see what comes in through you. There is also an opportunity to add “Additional information”. This is all information that you find relevant and that can be used as notes later on. Even though it’s not mandatory to fill in.

Note! We have a well-known bug where country is automatically chosen as Canada, don’t forget to change it back to your respective country.

3.2 Lead status



When a lead is created you can follow the sales process through the different statuses. Just click on the status that you want to look at and then to the right “Mark status as complete”. Then the lead will be given it’s new status.

Get an overview of the different statuses here:

- **New**: New lead that nothing has been done to yet
- **Open**: Efforts have been made to contact the customer but the customer has not yet been contacted
- **Contacted**: The customer has been contacted and the conversation has started
- **Offer sent**: An offer has been sent to the customer
- **Reject**: The customer is not interested now or will be that in the future. It can also be wrong information noted.
- **Nurture:** The customer is not interested right now, but can be in the future. But they are accepting card payments and could be interested in the future.
- **Converted**: The lead is converted to a sell, therefore the lead has now been created to an account.

4. Boarding

4.1 Create a new application to new customer

When a new customer are boarded the application is created by clicking “Boarding: standard prices” on the lead. Here you will be able to choose what product and price package that will be created. If it is an existing customer that uses several payment solutions you have to go through their account, push “Boarding: standard prices.”

When this field is filled you can click on “Start application” and there will be a new window open automatically with the application.

4.2 Application form

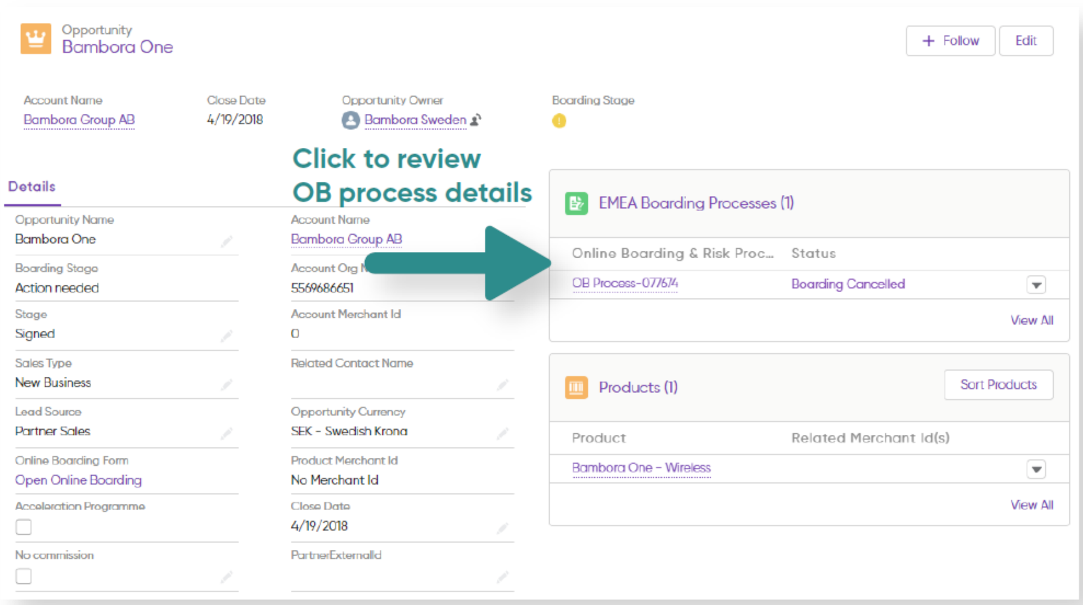
Based on the information that you have filled in with product and price package now there will be a new application form created. You fill in the form with all your information. If you have further questions, please contact your PAM at Worldline, and they will guide you.

When the application form is filled out with all information, it will be sent for signing. Here we will need to verify you account for payments, see and approve the application. When the application is approved it will be sent to Worldlines boarding section that will go through it and if everything is as it should be the customer will get its new payment solution approved and activated.

5. Sales opportunities and additions

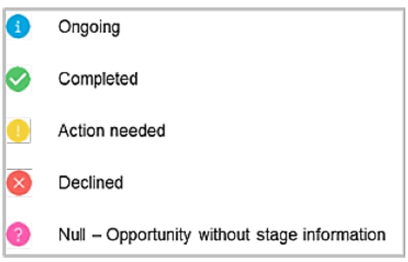
To see the status on your sales you can, under each sales opportunity se how far you've come in the process. Besides that you can also keep an eye on the boarding process. The arrow in the picture below is pointing at the onboarding process for a sales opportunity. Here you can see an unique number for this specific sales and next to it a status. Here you can also see how far Worldlines boarding section have come with your application. An "OB-process" is first created when the customer has approved the application. If the application is not approved, this field has to be empty. There will be 5 alternative under status:

- Underwriting started: The boarding section has collected your application and is looking in to it.
- Underwriting paused: The boarding section might have internal questions and the process is paused.
- Sent for complement: There is questions about the application.
- Boarding completed: The application has been approved.
- Boarding cancelled: A technical issue has occurred and the application needs to be created again.
- Boarding rejected: The application has been rejected.

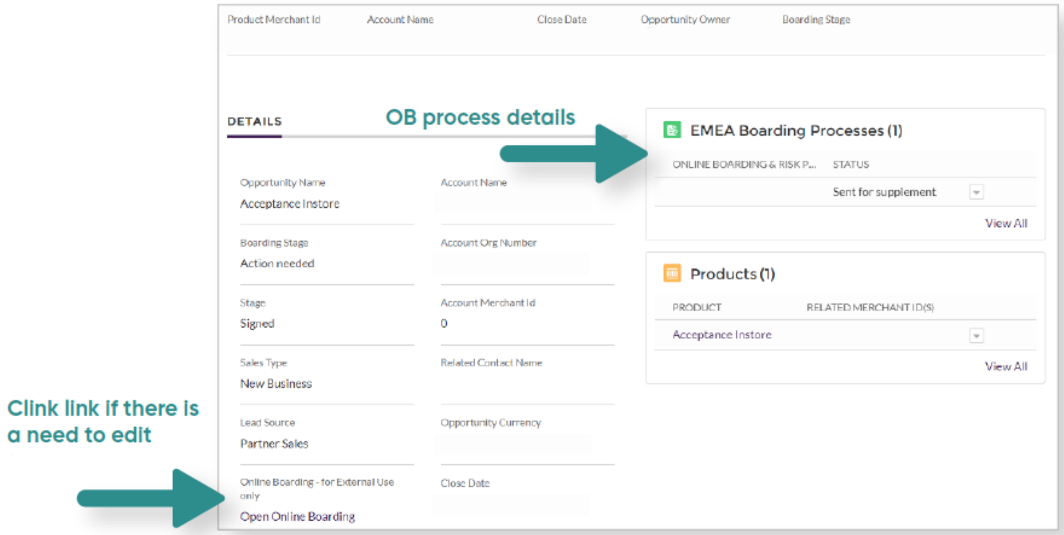


5.1 Boarding status

When an application has been approved and forwarded it will be marked with a color and status that you can see in the overview below.



If an application is ”late for complement you can click on the OB-process and see why that is. Here there will be a comment, in English, from Worldlines boarding section including what needs to be added in order to be able to approve the application. In some cases you can easily answer the comment but it other cases you will need to open the application and revise it in order to get it approved again. If that’s the case you can click where the lowest arrow points to edit the application. It can for example be that the ownership has been displayed incorrectly and need to be clarified, before the application can be approved.

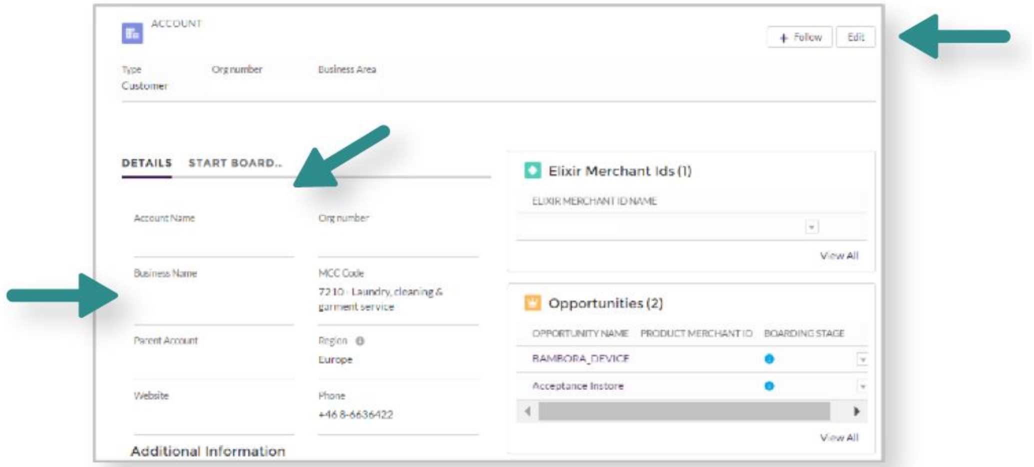


If there are any questions about the boarding process, Worldlines boarding specialists will be notified directly. The questions will be handled on an ongoing basis, in some cases you as a partner will be contacted but in other cases Worldlines boarding section will contact the customer directly. They can have questions about the companies arrangement, sales locations/domains or ownership. There could also be extra document that needs to be used to verify ownership, confirm sales locations or special organization types.

When the boarding specialist has got answers to the questions or has received further information that it will answer directly to our boarding section. This is the process to make sure that no technical issues occurs or misunderstanding when we send applications back and forth.

6. Customer account

A customer account includes all written data and information that Worldline has received. This is for example general notes written, sales opportunities, products, sales locations and contact information. The active contracts that a customers has with Worldline is all marked with a unique MID-number, this is their contract number and there is one of those per contact created.



It's possible to change the written information on a customer card, but never in an agreement that has been activated. By clicking "Edit" in the top right corner you will be able to change details about the customer like company name.

7. Dashboard

Under the "Dashboard" tab you can see a number of different reports about your sales and statistics. This data can be used for internal reports, which gives you an overview with everything from how many sales you have, product distribution, sales per agent and so on. If you have any other wishes for your report, please contact Partner Service and they can look into it.

8. Reports

Under the "Reports" tab you have access to several reports and folders. Here you can find reports that is also visible on your dashboard. Here you will also be able to find your commission reports.

9. Documents

Under the "Documents" tab you will find documents regarding everything from information, education and instructions. These are both for internal and external use, and the material will be updated on an ongoing basis.

Contact information

Support

Tlf: +46 (0) 10 10 66 000 #3 for partner service

Mail: Partnersupport.nordics@worldline.com