

SwipeSimple Overview Sales Training

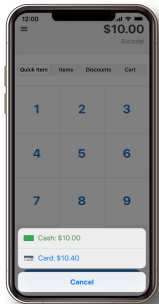
Software Packages through Sales Channel

NEW!!!

Start Simple Starter

Mobile - \$7.95

**Includes Dual Pricing
and Tap to Pay for
FREE!**



Scale Up Payments

Mobile + Gateway - \$9.95
+5.00 for Dual Pricing

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



Go Pro Terminal

PAX A920 Pro - \$9.95
+5.00 for Dual Pricing

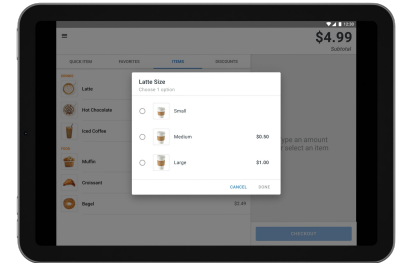
The all-in-one credit card
device for counter, booth,
and window payments



Go Pro Register

BYOD - \$14.95
+5.00 for Dual Pricing

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



Starter

Mobile

- BYOD
- **Dual Pricing included (FREE)**
- Invoices with Text to Pay and Automatic Reminders
- Customers on Mobile
- Tap to Pay on iPhone through TSYS and Fiserv
- Inventory Tracking and Management
- Advanced Reporting Dashboard
- Multi-Merchant Support
- Offline Mode with Store-and-Forward Functionality

Payments

Mobile + Gateway

- VT with Level II & III Interchange
- Invoices with Text to Pay and Automatic Reminders
- Hosted Payment Pages - Supports Payment Links
- Recurring, Card-on-File, Installment Payments
- Advanced Reporting Dashboard
- Tap to Pay on iPhone through TSYS and Worldpay
- Inventory Tracking and Management
- Multi-Merchant Support
- Offline Mode with Store-and-Forward Functionality

Terminal

Hardware and Added Features

- Smart Terminal on Pax A80, A920, and A920 Pro
- Post-Auth Tip Adjust
- Inventory Tracking and Management
- Advanced Reporting Dashboard
- Accept debit charges

Register

- Item Modifiers
- Item-level taxes

Optional add-ons

SwipeSimple Software Packages Overview through Sales Channel

This document outlines the features and pricing for SwipeSimple's software packages, designed to help you choose the best solution for your business.

Feature	Starter \$7.95 <i>(Includes Dual Pricing for free)</i>	Payments \$9.95	Terminal (PAX A920 Pro/A80) \$9.95	Register (PAX A920 Pro/A80, BYOD) \$14.95
Core Access	✓ Mobile App + Web Dashboard	✓ Mobile App + Web Dashboard	✓ Smart Terminal Connectivity	✓ Full Register POS Functionality
Tap to Pay on iPhone	✓	✓	—	—
Inventory Management	✓ Real-time sync & Item Catalog	✓ Real-time sync & Item Catalog	✓ Real-time sync & Item Catalog	✓ Item Modifiers
Virtual Terminal	—	✓ Card-on-File, L2/L3	—	—
Invoices	✓ Email/Text, Reminders, Branding, Send through Mobile app	✓ Email/Text, Reminders, Branding, Send through Mobile app + VT	—	—
Payment Links	—	✓ Buy Now, Text/Email/Social	—	—
Recurring Billing	—	✓ Subscriptions, Installments	—	—
Customer Database	✓ Card-on-File	✓ Card-on-File & Recurring Billing, Installment	✓ Basic CRM - contact info only	—
Discounts + Tipping	✓	✓	✓	✓
Batch Management	—	—	✓	✓
USB Peripherals	—	—	—	✓ Printer/Cash Drawer
Reporting	✓ Sales , Customer/Business Insights, Tax Prep	✓ Sales , Customer/Business Insights, Tax Prep	✓ Sales & Customer/Business Insights, Tax Prep	✓ Sales & Customer/Business Insights, Tax Prep

Find Your Perfect Fit

Every package is packed with power. Choose the features that match your merchant's needs..



Starter

- BYOD
- Invoices with Text to Pay
- Tap to Pay on iPhone
- Inventory Tracking
- Advanced Reporting
- Offline Mode



Payments

- Virtual Terminal
- Hosted Payment Pages
- Recurring Payments
- Card-on-File
- Multi-Merchant Support



Terminal

- Smart Terminal on PAX
- Post-Auth Tip Adjust
- Inventory Management
- Accept debit charges



Register

- Item Modifiers
- Item-level taxes
- USB Peripherals
- Full POS Functionality

SwipeSimple Starter: Freedom to Do Business Anywhere



Live and work on the move – not behind a desk



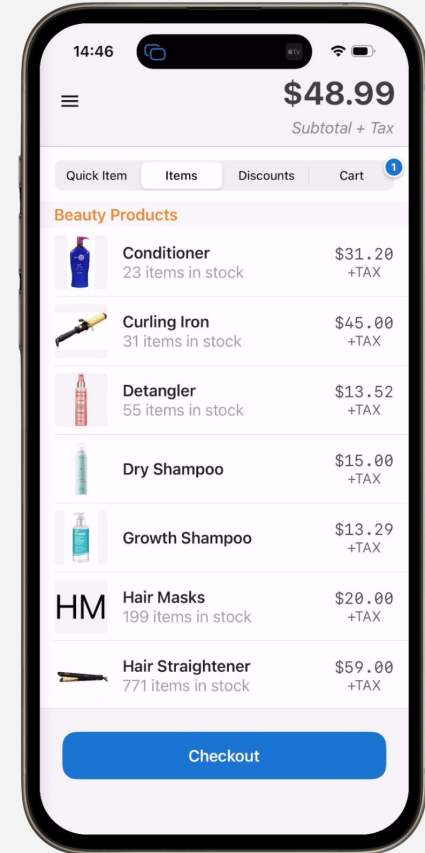
Save money without sacrificing quality



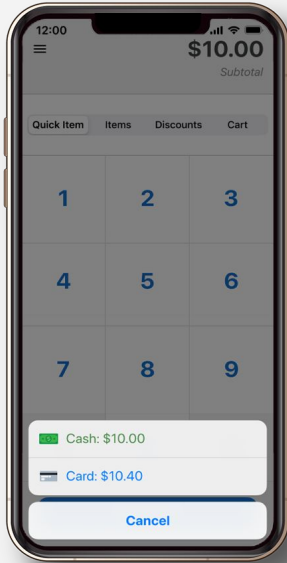
Need payments to be simple, not complicated



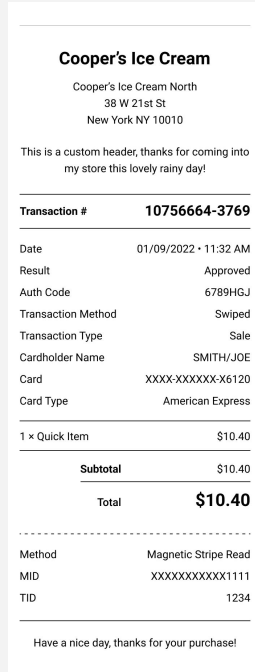
Serve customers wherever business happens



Dual Pricing with SwipeSimple (Waived Fees!)



**SwipeSimple
Mobile App**



Detailed Receipt

Dual Pricing is available on SwipeSimple Starter - Fees Waived

- Mobile App transactions
- Invoices
- Reporting
- Automatic adjustment on inventory and quick item based on cash and card

Tap to Pay on iPhone

Available now on Global Payments Sierra

Accept contactless payments anywhere

Ideal for pop-ups, craft fairs, and seasonal events. Merchants can accept contactless payments right from their iPhone—no setup, no cords, no reader.

No additional hardware

Busy during the holidays? All you need is an iPhone and the SwipeSimple app to start taking contactless payments instantly.

Privacy and security built in

Backed by Apple and SwipeSimple—card data is never stored on the device or Apple's servers, keeping every holiday transaction safe.

Easy for every team member

Perfect for businesses adding temporary staff. The familiar iPhone experience makes checkout fast and frustration-free.



SwipeSimple App Marketplace

*More tools for your merchants.
More value in every conversation.*

 Appointments

 QuickBooks Online Sync

 Text Loyalty & Reviews

Win More Merchants With a Bigger Story

You're not pitching a card reader. You're pitching a platform that grows with their business.

1

Payments

Every way to get paid

Tap to Pay on iPhone

Card readers

Payment links & invoices

Recurring billing

2

Business Tools

Built into SwipeSimple

Customer CRM

Real-time reporting

Inventory & items

Multi-user & Multi-merchant
access

3

App Marketplace

Even more value

QuickBooks Online Sync

Appointment scheduling

Text Loyalty & Reviews

When a prospect asks "what else can it do?" - you have the answer. That's how you win.

The Market Has Changed. Has Your Pitch?

Merchants are leaving fragmented, fee-heavy solutions — and looking for a partner that can grow with them.

Typical Payment Solutions ✗

- ✗ Hardware-first: card readers or terminals sold as the primary product
- ✗ Piecemeal tools from multiple vendors
- ✗ Manual bookkeeping & no integrations
- ✗ Scheduling handled elsewhere (or not at all)
- ✗ No loyalty or repeat-business tools
- ✗ High attrition — merchants switch when rates dip

VS

The SwipeSimple Way ✓

- ✓ One simple, unified platform
- ✓ Payments + Business Tools + App Marketplace
- ✓ QuickBooks Online Sync — automatic, seamless
- ✓ Appointment scheduling built right in
- ✓ Text Loyalty & Reviews to drive repeat business
- ✓ Stickier merchants, longer lifetimes, more volume

You're not pitching just a card reader or payment acceptance tool. You're pitching a platform that grows with their business.

App Marketplace

Merchants add these inside SwipeSimple. CardFlight handles billing, onboarding, and support. Keep your merchants sticky.

QuickBooks Online Sync

\$19.95/mo

Auto-sync transactions to QuickBooks. No manual entry. Clean books at tax time.

Best for: Any merchant with a bookkeeper

Appointments

\$29.95/mo

Branded booking page, auto confirmations, calendar sync. Fewer no-shows.

Best for: Salons, wellness, home services

Text Loyalty & Reviews

\$95.95/mo

SMS campaigns, loyalty rewards, automated 5-star review requests.

Best for: Beauty, auto, fitness, restaurants

What This Means for You

You refer

Point interested merchants to CardFlight

We handle it

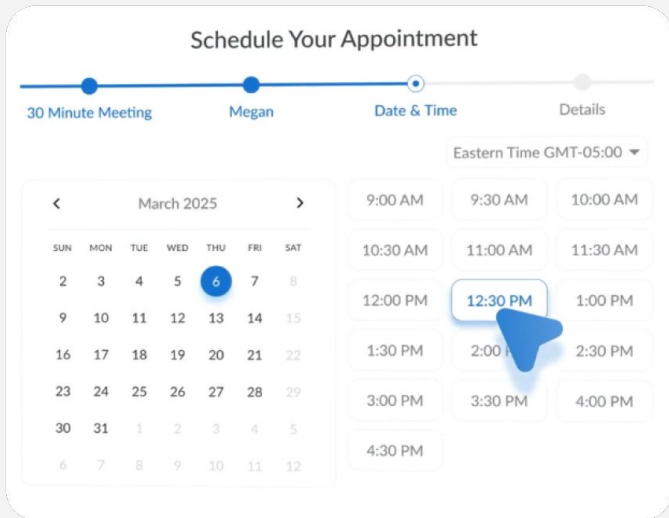
Billing, onboarding, and ongoing support

Keep Merchants Sticky

More tools = more daily usage = harder to leave

Appointments

home.swipesimple.com/appointments



Schedule Your Appointment

30 Minute Meeting Megan Date & Time Details

Eastern Time GMT-05:00

March 2025

SUN	MON	TUE	WED	THU	FRI	SAT
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5
6	7	8	9	10	11	12

9:00 AM	9:30 AM	10:00 AM
10:30 AM	11:00 AM	11:30 AM
12:00 PM	12:30 PM	1:00 PM
1:30 PM	2:00 PM	2:30 PM
3:00 PM	3:30 PM	4:00 PM
4:30 PM		

24/7 Booking Through a Branded Booking Site

Let customers book appointments anytime, from anywhere, while you focus on your business.

Automated Operations

Eliminate manual booking work with automated confirmations and customer self-service.

Smart Scheduling Tools

Set buffer times, manage capacity, sync with your calendar, and control your availability with precision.

Reduce No Shows

Automatic reminders and easy rescheduling keep your calendar filled.

Why Sell Appointments?

Appointments addresses a core need for service businesses by simplifying scheduling and reducing no-shows, making it relevant for a wide range of appointment-driven merchants while creating potential for revenue growth and reducing losses associated with no-shows.

We do the heavy lifting

You don't have to train merchants, staff help desks, or chase subscription fees. Just sell SwipeSimple like you always do. We'll own the billing and support

Win more deals

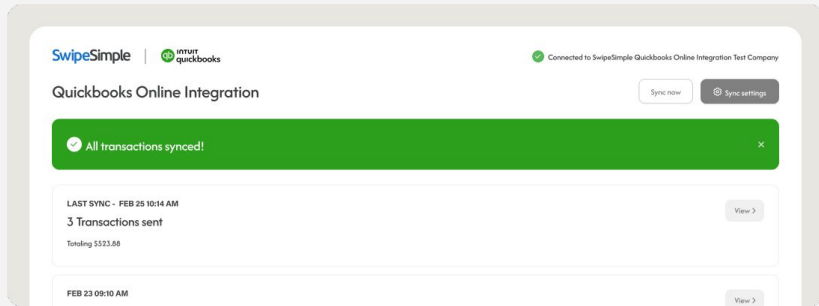
SwipeSimple Appointments gives you a competitive edge against Square and others—without any extra complexity on your end

Stickier merchants, more volume

Appointments boost merchant retention and increase card volume. You benefit from a stronger value prop and longer-lifetime customers—with no added burden to your team

QuickBooks Online Sync

home.swipesimple.com/quickbooks-online-sync



On-Demand Transaction Sync

Send SwipeSimple transactions directly to QuickBooks Online as Sales Receipts. No manual data entry required.

Hours Back Every Month

Eliminate repetitive bookkeeping tasks and focus on what matters most: growing your business and serving your customers.

Cleaner Reconciliation

Transactions flow into the proper QuickBooks workflow, making bank matching simple and accurate.

Accurate Financial Records

Reduce human error and keep reporting consistent and up to date.

Why Sell QuickBooks Online Sync?

QuickBooks Online Sync solves a real, everyday pain point, applicable to a high volume of merchants using QuickBooks Online across business categories.

We do the heavy lifting

You don't have to train merchants, staff help desks, or chase subscription fees. Just sell SwipeSimple like you always do. We'll own the billing and support

Win more deals

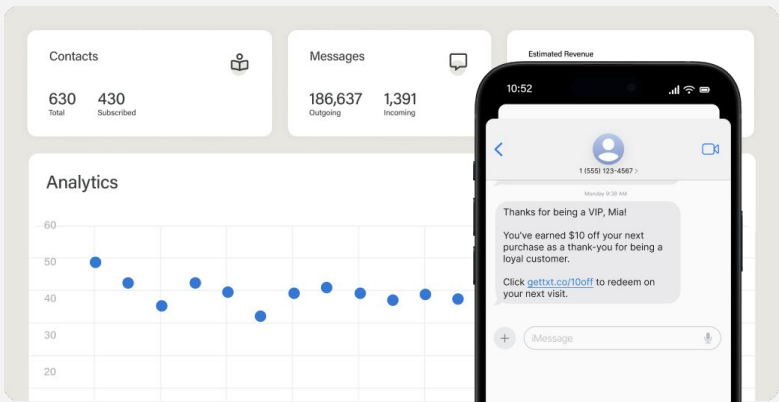
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Text Loyalty & Reviews

home.swipesimple.com/text-loyalty-reviews



Stay top-of-mind with timely promotions & communication

Scheduled or triggered campaigns, birthday, and win-back offers.

Turn happy customers into public 5-star reviews

Automated review requests that grow your online reputation without manual effort.

Increase repeat customers & lifetime value

Text-driven loyalty and offers with simple digital enrollment keep your customers coming back.

Reduce manual marketing work with automations

Set automated replies, check-ins, and campaigns. Segment by purchase or visit history, spend, or tags to create personalized messages and campaigns.

Why Sell Text Loyalty & Reviews?

Applicable for many small businesses that rely on repeat customers, creating strong attach-rate potential while delivering measurable revenue growth results.

We do the heavy lifting

You don't have to train merchants, staff help desks, or chase subscription fees. Just sell SwipeSimple like you always do. We'll own the billing and support

Win more deals

SwipeSimple Appointments gives you a competitive edge against Square and others—without any extra complexity on your end

Stickier merchants, more volume

Appointments boost merchant retention and increase card volume. You benefit from a stronger value prop and longer-lifetime customers—with no added burden to your team

How to Qualify Merchants for the App Marketplace

Ask these simple questions during your conversation — then refer the merchant and we handle the rest.

QuickBooks Online Sync

\$19.95/mo

"Do they use QuickBooks Online?"

Good fit if the merchant:

- Uses QuickBooks Online (not desktop) as their main bookkeeping platform
- Spends time reconciling transactions
- Hates manual data entry
- Any business that does invoicing or high volume transactions

Best for: Any merchant using QuickBooks Online

Appointments

\$29.95/mo Initial User, \$14.95 / mo after that

"Do customers schedule time-slots with them in advance – by phone, text or other platform?"

Good fit if they are:

- Appointment-based service: salons, wellness, medspas, personal trainers, tutors
- Home services (HVAC, cleaning)
- Sees revenue loss due to no-shows or last-minute cancellations
- Manages appointments with basic calendar

Best for: Salons, wellness, home services

Text Loyalty & Reviews

\$95.95/mo

"Do they rely on repeat customers, want more online reviews, or need to easily communicate with customers?"

Good fit if they are:

- Beauty, auto, fitness, QSRs
- Wants more 5-star reviews
- Runs promotions or specials
- Has few or inconsistent reviews
- Needs to regularly communicate with customers, in bulk or 1-to-1 (field service schedule updates, estimate or quote delivery, job completion confirmation, parts or supply delay notifications)

Best for: Beauty, auto, fitness, restaurants

Your Role Is Simple. We Handle the Rest.

CardFlight does most of the work – with minimal process changes required on your end.

YOU

1

Qualify & Gauge Interest

During your normal merchant conversation, ask one or two qualifying questions. Does the merchant use QuickBooks? Are they appointment-based? Do they rely on repeat customers?

→ *~2 min conversation*

YOU

2

Refer to CardFlight

Point the merchant to CardFlight. Drop them an email, hand over a one-pager, or send them to home.swipesimple.com/app-marketplace. That's all you need to do.

→ *partnership@cardflight.com*

CARDFLIGHT

3

Demo & Onboarding

Our team handles the product demo, onboarding walkthrough, and subscription setup. Merchants are fully guided through activation – no burden on you.

→ *We handle everything*

CARDFLIGHT

4

Billing & Support

CardFlight manages all billing, subscription renewals, and ongoing merchant support.

→ *We take care of all merchant needs*

Partnership Support – Every Step of the Way

99%

Same-day response to support tickets

88%

Customer satisfaction

67

Net Promoter Score

3.3%

Call abandonment rate

Sales Tools & Demo Mode

Demo-mode environments help your reps close. Up-to-date videos and collateral accessible in the field.

U.S.-Based Phone Support

Live human support for operations, boarding, and support teams during business hours. 24/7 online support center.

Partner Education & Webinars

Ongoing product education and webinars on sales trends and strategies. Partnership doesn't end at first training.

Custom Branding & Engagement Hub

Your brand on login pages, dashboards, headers, and welcome emails. List your own products inside SwipeSimple.

Refer a Merchant

partnership@cardflight.com

<https://home.swipesimple.com/app-marketplace>



 Appointments

 QuickBooks Online Sync

 Text Loyalty & Reviews

Merchant sign up via Merchant Dashboard

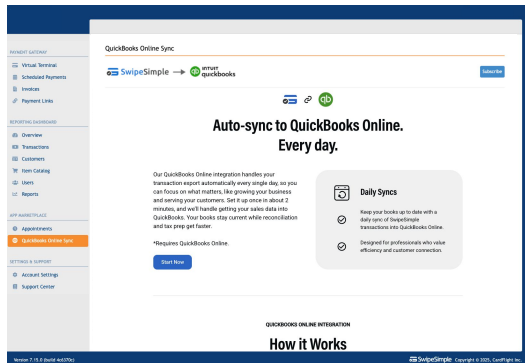
The screenshot shows the SwipeSimple Merchant Dashboard for 'Sally's Hair Salon'. The left sidebar contains navigation menus for 'PAYMENT GATEWAY', 'REPORTING DASHBOARD', 'APP MARKETPLACE', and 'SETTINGS & SUPPORT'. The main content area is titled 'Text Loyalty & Reviews' and features a central heading: 'TEXT LOYALTY & REVIEWS Turn happy customers into regulars and 5-star reviews.' Below this is a descriptive paragraph: 'Text Loyalty & Reviews is the all-in-one text marketing solution to help small businesses drive repeat visits, deepen customer relationships, and grow their brand.' At the bottom, three feature cards are displayed: 'Text Customers' (with a mobile phone icon), 'Reward Repeat Customers' (with a ribbon icon), and 'Earn More 5-Star Reviews' (with a star icon). A 'Sign In to Text Loyalty & Reviews' button is visible in the top right of the main content area.

Self-Serve Signup Process

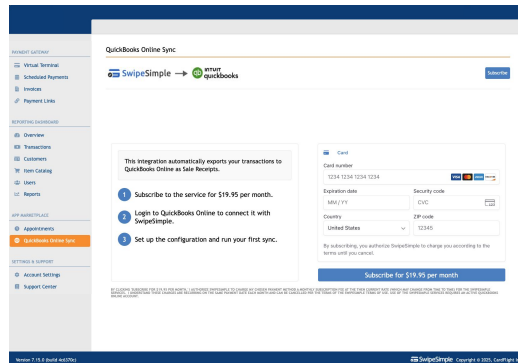
Example self-serve flow

This slide shows a three-step experience that takes a merchant from the app page in SwipeSimple to payment, then to integrating QuickBooks Online Sync, so they can get started on their own.

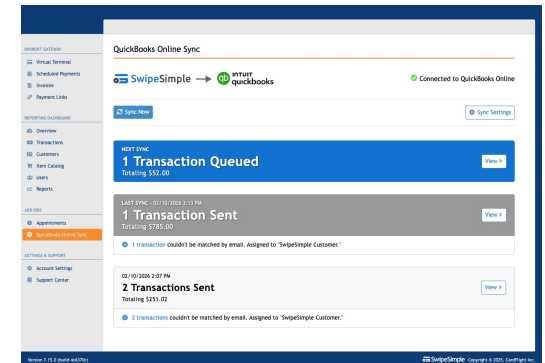
App Page in SwipeSimple



Payment



QuickBooks Online Integration



The logo consists of a stylized icon on the left and the text "SwipeSimple" on the right. The icon is composed of three horizontal bars of varying lengths, with a small circle containing a checkmark on the left side. The text "SwipeSimple" is in a bold, sans-serif font.

SwipeSimple