# How to Sell SwipeSimple

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# Product Overview

SwipeSimple is an all-in-one payment solution that works for small to medium-sized businesses whether they want to take payments on the go, in their store, or from their computer. With a user-friendly interface and a wide range of features, SwipeSimple makes it easy for merchants to accept payments and manage their business. Here’s an overview of the 3 SwipeSimple products that you can offer your merchants with OvationCXM.

## SwipeSimple Payments

SwipeSimple Payments includes access to the mobile application and 4 additional ways to take payments from the computer, including the Virtual Terminal, Recurring and Scheduled Payments, Invoices, and the ability to add a link for customers to pay for services through hosted payment pages (known as Payment Links). This product provides merchants with the flexibility to accept payments anywhere—whether it's in-store, in the field, or from their computer. With SwipeSimple Payments, merchants can easily process transactions, manage customer profiles, and track transaction history, making it a perfect fit for merchants. Plus, SwipeSimple offers robust, cloud-based reporting tools and analytics so merchants can easily manage their business from anywhere.

## SwipeSimple Terminal

SwipeSimple Terminal is a great fit for a merchant who wants a sleek, countertop payment device to accept credit card payments. SwipeSimple’s cloud-based inventory makes it easy for merchants to manage their inventory at a glance. For a small monthly fee, add on SwipeSimple Payments to have access to 4 additional ways to take payments with the Virtual Terminal, Scheduled Payments, Invoices and Payment Links.

## SwipeSimple Register

SwipeSimple Register is a lite-POS solution tailored for businesses with more advanced inventory needs. SwipeSimple Register offers additional features, such as Item Modifiers, and Item-Level Taxes that are essential for merchants who need the ability to organize a more robust Item Catalog. These tools allow merchants to streamline transactions, customize orders, and accurately apply taxes, giving them full control over their operations. With real-time insights into inventory and detailed reports, SwipeSimple Register helps small business merchants make smarter business decisions, reduce errors, and enhance profitability.

# Value Propositions

### Value Proposition for On-Site Technicians

SwipeSimple is a great solution for on-site technicians to accept payments anywhere with ease. Whether technicians are providing services at a customer's home, at a job site, or in the field, SwipeSimple ensures merchants can process payments on the go—helping them get paid faster and manage their business.

Benefits:

* With the SwipeSimple mobile app, you can process credit card payments right from your smartphone or tablet—no need for a bulky setup or trips back to the office.
* With SwipeSimple, merchants can manage and send invoices directly from their phone or SwipeSimple web. And, because SwipeSimple is cloud-based, merchants can keep track of all their invoices in one place.
* Offer your customers more ways to pay, including Payment Links and Invoices that can be sent via email or text.
* Save time and increase efficiency by managing your customer profiles, transaction history, and even recurring payments from SwipeSimple Dashboard. No more paperwork or delayed payments.
* Set up alerts to keep track of transactions and inventory in real-time

With SwipeSimple, you have the freedom to focus on completing the job in-front of you, with no need to worry about how you're getting paid. Whether you’re managing a team of technicians or working independently, SwipeSimple delivers the flexibility and convenience to keep your business moving.

### Value Proposition for Food and Beverage

SwipeSimple is the perfect payment solution for small to medium-sized Food and Beverage and Quick Service Restaurants looking to streamline operations and enhance the customer experience. Whether you're running a local café, a food truck, or a quick-service restaurant, SwipeSimple offers the tools to help you process payments quickly, manage inventory, and serve customers efficiently.

Benefits:

* Process payments quickly and securely with SwipeSimple Register on a PAX A920 or PAX Aries 8, perfect for counter service, table-side payments, or food truck operations. This smart terminal solution allows your staff to take payments anywhere in or at outdoor events.
* Take control of your inventory with SwipeSimple's cloud-based management system. Track ingredients and menu items in real-time while setting up low stock alerts to prevent running out of popular ingredients. Your entire inventory is accessible across all payment channels, making it easy to maintain accurate stock levels.
* Optimize your checkout process with features designed for food service efficiency. Create a Favorites page for quick access to popular items and customize orders with modifiers for special requests.
* Expand your payment acceptance capabilities by adding on the gateway account for a small monthly fee. Take phone orders through the Virtual Terminal and streamline catering services with digital invoices and payment links. Set up recurring payments for subscription services or meal plans to create additional revenue streams.
* Make data-driven decisions with SwipeSimple's comprehensive reporting tools. Track your peak sales periods and best-selling items while analyzing trends across different payment methods.

With SwipeSimple, small and medium-sized F&B and QSR businesses can improve operational efficiency, reduce wait times, and track inventory. Whether you're managing one or multiple locations, SwipeSimple gives you the tools you need to run your business smoothly and scale with confidence.

### Value Proposition for Automotive Repair

SwipeSimple is the ideal payment solution for automotive repair businesses looking to streamline operations. Whether you’re running a local repair shop, a mobile auto service, or an auto service shop, SwipeSimple offers the tools you need to process payments efficiently, manage customer accounts, and simplify billing for repair services.

**Benefits:**

* Speed up the checkout process with SwipeSimple Terminal on a PAX A920. This set-up makes it easy to enter in a set dollar amount or select items from your inventory. Reduce downtime at the counter, speed up transactions, and ensure a seamless customer experience. Plus, the PAX A920 is wireless and can be used car-side, so your customers don’t need to walk up to a counter to pay.
* For a small fee, you can add the SwipeSimple Payments to accept payments through the Virtual Terminal for emergency repairs, towing, or mobile services, enabling you to serve customers over the phone.
* Use Scheduled Payments to simplify billing for ongoing services, like routine maintenance plans or repair services spread across multiple appointments. This feature allows you to automatically charge customers for recurring services, ensuring payments are submitted on time and less administrative work for your team.
* Send itemized invoices to customers for repair services and parts. Easily track and manage outstanding payments, providing for a more professional billing process.
* Track parts and supplies with real-time inventory management helping you manage stock levels. With SwipeSimple’s cloud-based inventory and alerts, you’ll always know what parts are available and when to reorder, preventing delays in repair services.
* Monitor sales, inventory, and transaction history through SwipeSimple’s dashboard, providing insights that help with making informed business decisions.

With flexible payment options, automotive repair shops can rely on SwipeSimple to simplify taking transactions, manage their inventory across devices and stay on top of operating their business.

### Value Proposition for Retail Merchants

SwipeSimple is the ideal payment solution for retail merchants looking to streamline their operations, manage inventory, and deliver exceptional customer experiences. Whether you're running a specialty boutique, sporting goods store, antique shop, or print shop, SwipeSimple provides the flexibility and tools you need to efficiently run your business and serve customers both in-store and online.

**Benefits:**

* Process payments seamlessly with SwipeSimple Terminal on a PAX A920 for fast, secure in-store transactions, plus take your business on the road with our mobile solution - perfect for pop-up shops, farmers markets, or seasonal events.
* Accept payments with an omni-channel offering, including in-person, online payment links, and invoices
* Support contactless payments including Apple Pay and Google Pay for customer convenience
* Stay on top of your business with SwipeSimple's cloud-based inventory management that lets you track stock levels in real-time, set up low inventory alerts, and easily organize seasonal merchandise and detailed product catalogs across all your payment channels.
* Gain powerful business insights through SwipeSimple's intuitive dashboard - from tracking best-selling items and peak sales periods to managing customer profiles and setting up custom alerts for key performance metrics.
* Enhance the customer experience by streamlining checkout with quick-access to a Favorites page, providing detailed digital receipts, supporting Item Modifiers, and offering flexible payment options that match your customers' preferences.

With SwipeSimple, retail merchants can optimize their operations, better serve their customers, and scale their business with confidence. Whether you're managing a single location or multiple stores, SwipeSimple delivers the tools you need to succeed in today's competitive retail environment.

# Key Features

* Mobile app for on-the-go payments
* Virtual Terminal which supports Level II and Level III
* Installment and Recurring Payments
* Web and Mobile Invoices
* Hosted Payment Pages
* Custom Alerts
* Cloud-Based Inventory
* Item Tracking
* Transaction History
* Cash Discounting
* Customer Profiles
* Item-Level Taxes
* Item Modifiers

# Statistics

**On-site Technicians (Plumbers)**

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 On-site Technicians typically accept payments:

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

**F&B (Bakeries)**

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 F&B merchants accept payments today with SwipeSimple:

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

**Automotive Repair**

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 Automotive Repair merchant accept payments today with SwipeSimple:

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

# Marketing Collateral

* [Content Hub](https://home.swipesimple.com/content-hub/1-sheets)
	+ [Software Package overview](https://go.swipesimple.com/l/748973/2022-06-29/m2v35/748973/1656528955pAi4hGEI/Software_Package_overview_1_sheet.pdf)
* By Vertical
	+ [SwipeSimple for In-Person Services](https://fly.cardflight.com/l/748973/2021-12-22/bjk84/748973/1640189072zNNAV1ed/SwipeSimple_for_in_person_services_merchants.pdf)
	+ [‍‍SwipeSimple for Food and Drink](https://fly.cardflight.com/l/748973/2021-10-19/98qms/748973/16346797951zfWn2za/SwipeSimple_business_types___food_and_drink.pdf)
	+ [SwipeSimple for On-Site Services](https://fly.cardflight.com/l/748973/2021-12-22/bjk86/748973/1640189207OApnMumU/SwipeSimple_for_on_site_services_merchants.pdf)
	+ [SwipeSimple for Retail](https://fly.cardflight.com/l/748973/2021-12-22/bjk7z/748973/16401887699SbNvTS2/SwipeSimple_for_Retail_merchants.pdf)

# Sales Pitches

* Qualify the prospect
	+ How are you accepting credit card payments today?
	+ Are you using any payment software or hardware currently? If so, what are the pain points?
	+ Do you process transactions in-person, online, or both?
		- Do you use your phone or terminal to accept payments?
	+ How do you currently manage reporting and analytics for your business?
	+ Are you looking for a payment solution that supports invoicing or recurring payments?
* Prior to the appointment
	+ Request date and time for product demo
	+ Identify date and time for product demo
	+ Sending a pre-demo overview or material to the merchant to let them know what to expect during the upcoming appointment
* During the appointment
	+ SwipeSimple Web Demo Environments
		- SwipeSimple Web demo (<http://app.swipesimple.com/demo>) - Have SwipeSimple web demo environment available at the time of the appointment.
			* Highlight Card Not Present features such as the Virtual Terminal, Scheduled Payments, Invoices and Payment Links which makes it easy for your merchants to increase their payment volume over time.
		- SwipeSimple mobile application demo - Download SwipeSimple from the Google Play Store or the App Store for iOS. Select "Demo Mode" to test out on an iOS or Android phone/table.
* Talk tracks
	+ What are your needs?
	+ What challenges do you face with your current payment processing system?
	+ How do you typically take credit card payments with your customers? (ie cards, cash)
		- Do you take payments over the phone? In person? Both?
		- Out in the field? (Mobile, terminal)
	+ Besides credit cards, do you accept any other forms of payment?
	+ Can you describe the typical payment environment for your business? (e.g., in-store, online, mobile)
	+ What features are important to you in a mobile payment solution? (e.g., offline capabilities, inventory management)
	+ Do you need a solution that is easy to train staff on and intuitive for customers?
	+ Do you need a flexible payment solution that can adapt to your changing business needs?
	+ How important is it for you to have access to detailed transaction reports and analytics for decision-making?
* Post appointment
	+ Share additional material with the merchant such as the [Support Center](http://support.swipesimple.com/)
	+ Pass information along to OvationCXM’s technical support team to onboard the merchant

# Objection Handling

### **"We already have a payment system in place for accepting credit cards."**

* 1. “SwipeSimple is designed to complement or replace your current payment solution while offering features like accepting payments from your phone, additional ways to take payments from your computer, and detailed reporting that makes it easy for you to prioritize what’s the most important for your business."

### **"We don’t have time to implement a new system."**

* 1. “SwipeSimple is designed for easy setup, and OvationCXM will help you quickly onboard your team. With features for managing customer and inventory data, SwipeSimple allows you to export and import data from your current system making it easy for you to focus on growing your business.”
		1. I've attached this Support Center article that goes into detail about:
			1. [Item Catalog: Import/Export Functionality for Multiple Items](https://support.swipesimple.com/hc/en-us/articles/8593408108823-Item-Catalog-Import-Export-Functionality-for-Multiple-Items)
			2. [Import a Customer List using a CSV File](https://support.swipesimple.com/hc/en-us/articles/360035933373-Import-a-Customer-List-using-a-CSV-File)

### **"Our customers prefer paying with cash or checks."**

* 1. "That’s understandable, SwipeSimple does support tracking cash transactions. However, I want to note that the trend toward card and contactless payments is growing rapidly. SwipeSimple allows you to cater to the increasing number of customers who prefer card payments or mobile wallets like Apple Pay and Google Pay, giving you a competitive edge and potentially boosting sales. And, SwipeSimple has the ability to record your cash sales."

### **"My team isn’t very tech-savvy."**

* 1. "SwipeSimple was built for users of all technical levels. It’s straightforward design makes it easy to navigate the application, and SwipeSimple offers comprehensive support and training resources on their [Support Center](http://support.swipesimple.com/), including step-by-step guides and videos. We’re also here to assist you throughout the onboarding process to ensure your team feels confident using the system."

### **"We don’t have time to learn a new system."**

* 1. "I completely understand your concern about time. We hear this a lot from busy merchants like yourself. The good news is that SwipeSimple is designed with simplicity in mind, making it very easy for your team to learn. SwipeSimple’s easy to learn interface and detailed reporting ensures minimal disruption to your business. Many merchants are up and running within a day, and we provide ongoing support and training to make sure everything runs smoothly. Additionally, learning SwipeSimple will save you time in the long run with features like quick reporting, easy inventory management, and seamless transactions."

### **"What if we encounter problems while using SwipeSimple?"**

* 1. SwipeSimple offers customer support hours from Monday through Friday from 8am-9pm ET, phone and email support, and an extensive knowledge base such as their [Support Center](http://support.swipesimple.com/). In addition, our dedicated support team here at OvationCXM is available to assist you whenever you need help, ensuring that any issues can be resolved quickly so you can continue processing payments without interruptions."