



Summer *of Learning*



**SALES 101 AND HOW TO SPOT A
UTA OPPORTUNITY**

TODAY'S PRESENTER

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KNOW YOUR PRODUCT

KNOW YOUR PRODUCT
KNOW YOUR CUSTOMER

**KNOW YOUR PRODUCT
KNOW YOUR CUSTOMER
ESTABLISH RELATIONSHIPS**

KNOW YOUR PRODUCT
KNOW YOUR CUSTOMER
ESTABLISH RELATIONSHIPS
FOLLOW UP REGULARLY

ALWAYS BE CLOSING



BALONEY!!!!

ALWAYS BE HELPING

closings will come

LISTEN AND ASK QUESTIONS

- Don't Interrupt
- Wait ???

Why Am I Talking



BE HONEST
BE GENUINE
BE YOURSELF

**THE BEST SALES TIP
I CAN OFFER....**

“WE KNOW THAT THIS SERVICE COMES UP FOR REVIEW FROM TIME TO TIME. ALL WE ASK IS THAT WHEN IT DOES COME UP FOR REVIEW, PLEASE MAKE SURE THAT WE ARE INVITED TO THE TABLE”

WHY RECOMMEND UTA?

- 24 YEAR TRACK RECORD OF SERVICE, INTEGRITY, AND PERFORMANCE
- DECADES OF SUCCESSFUL PARTNERSHIPS WITH NACM AFFILIATES NATIONWIDE
- MILLIONS OF DOLLARS PAID TO NACM IN DIRECT SUPPORT, ADVERTISING, AND SPONSORSHIPS
- UTA HAS CONTINUED TO BE RELEVANT WITH NEW SERVICES AND CUTTING EDGE TECHNOLOGY

ABOUT UTA

- PRIVATELY HELD COMPANY
- 98% PLUS CUSTOMER RETENTION YEAR OVER YEAR
- DEDICATED CUSTOMER SERVICE MANAGER
- \$7 MILLION PAID OUT IN GOOD WILL IN 2020

ABOUT UTA

- UTA IS THE LARGEST CHECK GUARANTEE COMPANY IN THE US
- 37% MARKET SHARE IN NEW CAR DEALERSHIPS
- 15 OF THE TOP 20 BUILDING MATERIALS COMPANIES IN THE COUNTRY USE UTA
- 80% OF MAJOR ELECTRICAL SUPPLY COMPANIES USE UTA
- 80% OF ROOFING SUPPLY HOUSES USE UTA

NACM MEMBERS BENEFIT PACKAGE

- MEMBERS BENEFIT PACKAGE HAS BEEN IN EFFECT FOR OVER TWENTY YEARS
- OFFERS AN AVERAGE OF 15% TO 25% REDUCTION IN CREDIT CARD COSTS
- PROVIDES SPECIAL BENEFITS FOR CHECK GUARANTEE CUSTOMERS
- WAIVES DEVELOPMENT FEE FOR CUSTOMER FACING PAYMENT PORTAL

HOW TO SPOT AN OPPORTUNITY



PAYMENT ACCEPTANCE CHANNELS

Remote and electronic payment channels are a must-have for all merchants. They are secure, compliant, and, most importantly, limits physical interaction.



Mail-In
Back
Office



Counter
Sales
Face to
Face



Payments
over the
Phone



Online
Payment
Portal



API



Mobile

ACH PROCESSING

Features:

- Instant - get your money now
- **Guaranteed settlement available**
- Accelerated access to Funds
- Reduces Costs
- Future payments
- Recurring transactions
- Secure

Payment Entry Screen

Customer #: F15357441 * Auto Load Memorize Customer ☐

Customer Name: ABC Fence Co

Scheduled Transaction Date: 05/26/2020

ABA Routing #: 267084131

Bank Name: JPMORGAN CHASE
JPMORGAN CHASE BANK, NA
WASHINGTON MUTUAL BANK

☒ Bank appears in list ☐ Bank not in list

Check Account #: 2223146915615 *

Check Number:

Check Type: ☒ Business ☐ Personal

ACH Authorization Method: Business Account; pre-authori *

Amount \$: 5589.52 *

Enter Invoice Detail: ☐ Yes ☒ No

Memo:

Attach Remittance/File: Choose File No file chosen

Checking Account
120002024 87884884 7884
Bank Routing Number Check Account Number Check Number

ONLINE PAYMENT PORTAL (OBP)

Accept Secure Customer Initiated Payments on your Website.

- Works with your current banking relationship
- No development work required
- **Guaranteed settlement available**
- Fully hosted – turnkey solution
- Virtual Remittance Feature: Simply attach and send!

[Pay by ACH/Checking Account](#) [Pay by Credit Card](#) [Report](#) [Edit Profile](#) [Log out](#)

Credit Card Payment

Date: 08/11/2020

Customer Name: OBP Demo

Customer #	OBP Demo		
Address	2811 Corporate Way		
Zip	33025		
City	HOLLYWOOD		
State	FL		
Country	Select One		
Name on Card	OBP Demo		
Card Number	Required field.		
Exp. Month	01	2020	
CVV	Required field.		
Transaction date	08/11/2020		
Customer Email	jdoe@acmecorp.com		
Remittance Information			
Attach Remittance/File	<input type="button" value="Choose File"/> No file chosen		
Payment Type	Make a Selection		

☐ Save this Credit Card information for my next online payment.



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If you require assistance please contact the Help Desk at 214-273-3426 or email us at css@obe.com

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Payments processed by



CREDIT CARD PROCESSING

Features:

- Discounted processing fees
- Automated Level 2 and 3 Processing
- Surcharging
- P2PE Validated Solution
- PCI Compliant
- Tokenization



CREDIT CARD SURCHARGING

Features:

- Reduce compliance exposure
State/Federal Law Compliant
- Smart surcharge calculation
will apply the fee
automatically
- Surcharging notification and
disclosure requirements will
be provided
- Card validation occurs at the
point of entry. Only qualified
payments are surcharged

Credit Card Payment Entry

Input as: CCC STEEL, INC. (EFT) - 311560000 - 9. ▾

Customer #: 15611

Auto Load Memorize Customer ☐

Invoice/SO #: A165165

Address: 123 elm street

Zipcode: 33185

City: Miami

State: FL ▾

Phone #: 3055551212

Name on Card: ABC Concerte Company *

Card Number: 4847*****6329

Exp Date: 06 ▾ / 2017 ▾

CVV:

Action: Sale ▾

Amount: 0.00

Address Verification Service: ☐ Yes ☒ No

Remittance File:

Purchase Level: ☐ Standard ☒ Level II ☐ L

Multiple Invoice: ☐ Yes ☒ No

Memo:

3-Digit Security Code

4-Digit Security Code

Card Number: 4847*****6329 *

Exp Date: 06 ▾ / 2025 ▾

CVV: 123

Action: Sale ▾

Subtotal: 33,985.41 *

Surcharge (2.13%) 723.89 *

Amount: 34,709.30 *

MOBILE DEPOSIT

Process Payments on the Go!

- Use the camera on your mobile phone or tablet to deposit checks
- Supported on iOS and Android Devices
- No additional equipment or peripherals to purchase
- Real time access to your transactions via standard UTA reporting tools



Money in the bank!
It's that simple

CHECK GUARANTEE

Features:

- Highest Average Check Amount Approvals
- Highest Approval Rates
- No mistake programs
- Designated Customer Service Manager



PAYMENT PROCESSING SOLUTIONS



Standard Check Guarantee



Credit Card Processing



Credit Card Surcharging



ACH Processing



Online Payment Portal



Remote Deposit Capture



Mobile Deposit



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ANY QUESTIONS? – GET IN TOUCH

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