

INTERNAL: DrChrono Payments - Potential Migration Paths

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WorldPay:



Can we solicit these merchants? - We cannot solicit the migration of WorldPay practices to Stripe. We need to make that abundantly clear to our customer facing teams that moving from WorldPay is a major revenue risk to EverCommerce (all WorldPay processing volume for EverCommerce).

***WorldPay merchants should be removed from **all** external sales and marketing activities promoting DrChrono Payments.

When can we migrate these merchants? - Only in the rare instance we have a compelling reason like the practice churning from the software.

How can we support merchants that want to move processors.

Encourage them to stay on their current processor (WorldPay). We should see if we can help support their current needs on WorldPay and provide a great customer experience for that product. We do not want to migrate these merchants if we do not have to.

IF we have thoroughly explored option 1 (above) to keep them on their current processor and they still have a risk of churn, we can explore migrating them to DrChrono Payments. This should be our last-ditch effort to keep the merchant happy and should be a rare occurrence. To submit a migration request, please send one off emails to vhood@paysimple.com verifying that migration is the only remedy and provide the business details, the need for migration and any additional information. Vaughn will then coordinate with the PaySimple team to ensure a smooth transition.

Square:



Can we solicit these merchants? - We cannot solicit the migration of Practices from Square to Stripe. We need to make that abundantly clear to our customer facing teams that moving from Square is a major revenue risk to EverCommerce (all Square processing volume for EverCommerce).

***Square merchants should be removed from **all** external sales and marketing activities promoting DrChrono Payments.

When can we migrate these merchants?

Only in the rare instance we have a compelling reason like the customer churning from the software.

Only if these merchants do not require card data transfers. We cannot transfer stored card data.

How can we support merchants that want to move processors.

Encourage them to stay on their current processor (Square). We should see if we can help support their current needs on Square and provide a great customer experience. It is critical to note, we cannot transfer any stored card data. We do not want to migrate these merchants if we do not have to.

IF we have thoroughly explored option 1 (above) to keep them on their current processor and they still have a risk of churn, we can then explore migrating them to DrChrono Payments. This should be our last-ditch effort to keep the merchant happy and should be a rare occurrence. To submit a migration request, please send one off emails to vhood@paysimple.com verifying that migration is the only remedy and provide the business details, the need for migration and any additional information. Vaughn will then coordinate with the PaySimple team to ensure a smooth transition.
