DIGITAL OPTIMIZATION PROGRAM TEMPLATE KIT

**We are here to accelerate your digital transformation**

Whether you are at the start of your journey or need support reaching the finish line, the Digital Optimization Program is at hand to help you exceed your organization's goals, while improving customer experience.

THE TEMPLATE KIT

It's our mission to get you up and running quickly with your digital optimization efforts. We want your business and your customers to realize the benefits as soon as possible!

To get started, set up a global rule for your check-paying customers within Quadient AR using our step-by-step guide below. We've also crafted effective email templates that you can use in this workflow, or you can create your own.
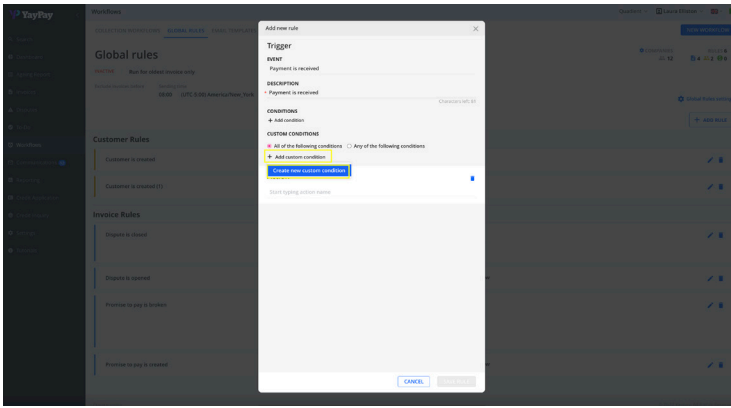
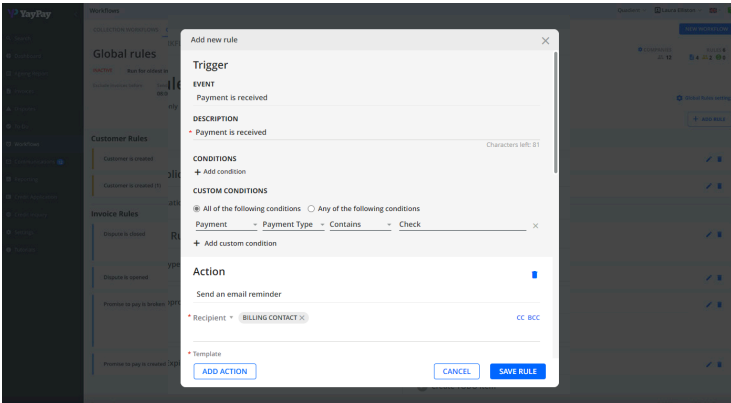## HOW TO ADD THE GLOBAL RULE FOR CHECK-PAYING CUSTOMERS INTO QUADIENT AR*
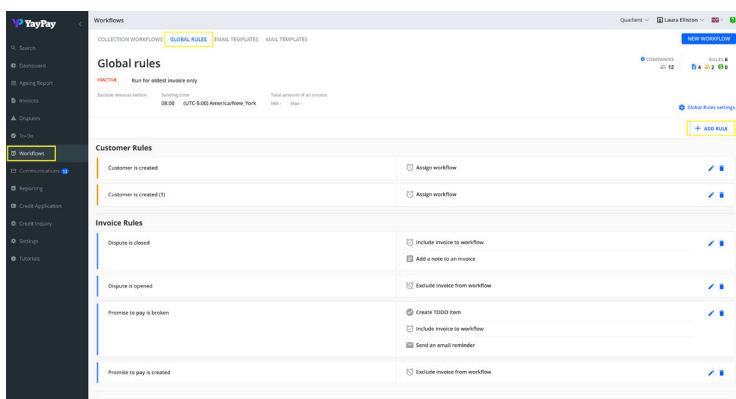
1. Click on workflow, then Global Rules

2. Click Add Rule

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accounts receivable
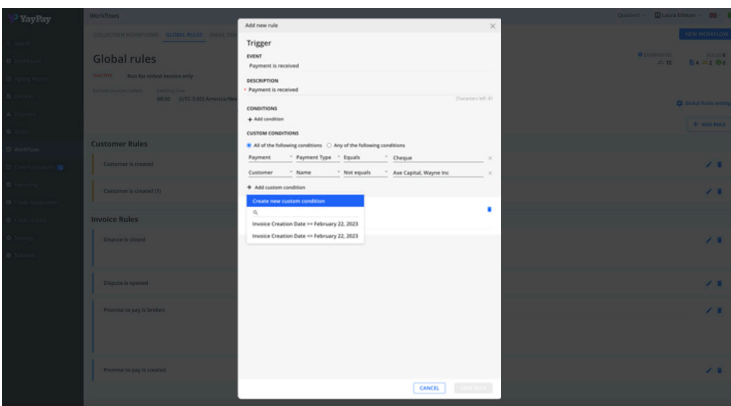by YayPay
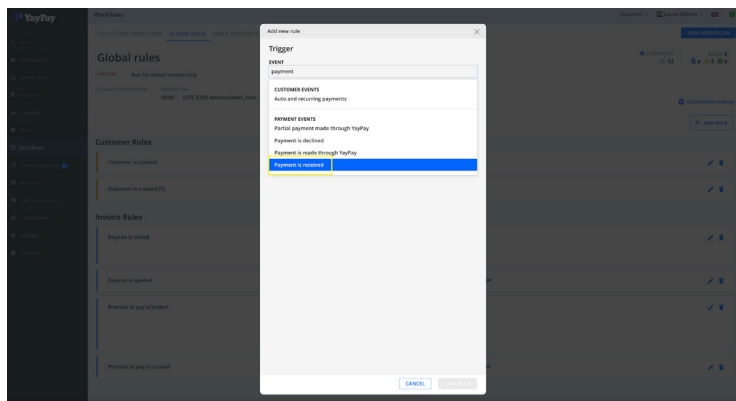
3. Choose Event – Payment is Received

4. Click Add Custom Condition and Create New Custom Condition

- Type = Payment
- Field = Payment Type
- Operation = Contains
- Value = Check
- Action = Send Email Reminder

- Recipient = Billing Contact,
- Template = Check Customer Email Campaign (there are currently two versions, which you can copy and paste from this document)
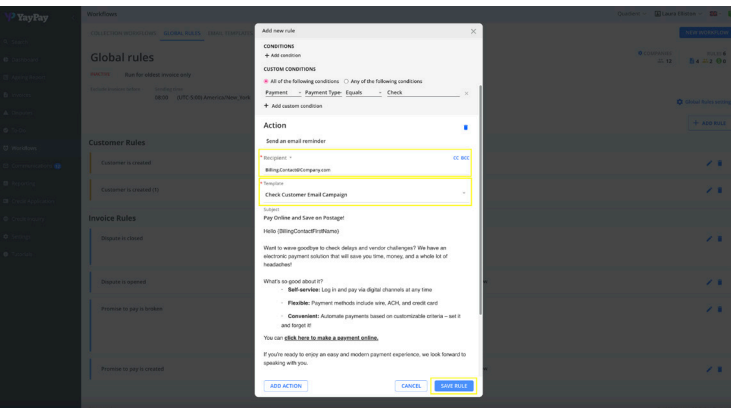
5. Save rule

6. Custom Conditions

Parameters to exclude certain customers:

The current limitation is 1k characters in a row. To exclude more than one customer, enter customer names separated by *comma* and *space* or create multiple custom conditions.

This rule captures every payment received, targeting check paying customers to pay electronically.

This will not interfere with any existing communications workflows you have already set up for your customers.

Payment Types must be sent (or submitted in file) to facilitate this campaign type.

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These email templates can be integrated into your Global Rule for check-paying customers to emphasize the value of moving to digital payment channels. Start using them today!

EMAIL 1

<table>
<tr><td>✉️ **Pay Online and Save on Postage!**</td></tr>
</table>

Hello Customer Name(s),

Want to wave goodbye to check delays and vendor challenges? We have an electronic payment solution that will save you time, money, and a whole lot of headaches!

What are the added benefits?
Self-service: Log in and pay via digital channels at any time
Flexible: Payment methods include wire, ACH, and credit card
Convenient: Automate payments based on customizable criteria – set it and forget it!
You can **click here to make a payment online.**

If you're ready to enjoy an easy and modern payment experience, we look forward to speaking with you.

Should you have any questions regarding your electronic payment, please contact **(email, phone or both).**

Sincerely,
John Smith Director of Credit

EMAIL 2

<table>
<tr><td>✉️ **Save Time and Money by Paying Online!**</td></tr>
</table>

Hello Customer Name(s),

Are you tired of gassing up your vehicle to buy stamps and envelopes to pay your bills? Today, there is a far easier way to settle invoices.

An electronic payment solution enables you to focus on your priorities, instead of payment logistics!

How does it work?
Self-service: Log in and pay via digital channels at any time
Flexible: Payment methods include wire, ACH, and credit card
Convenient: Automate payments based on customizable criteria – set it and forget it!
You can **click here to make a payment online.**

If you're ready to enjoy an easy and modern payment experience, we look forward to speaking with you. Should you have any questions regarding your electronic payment do not hesitate to contact me.

Sincerely,
John Smith Director of Credit

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READY TO GET STARTED?

The Digital Optimization Program is ready for you to leverage — whether you have an idea of where you'd like to be, or simply want to effect change but don't know where to begin.

We'll take time to understand your business and work with you to develop a winning transformation strategy that benefits you and your customers!

Contact us today: digitalopt@quadient.com

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