



# Commercialization Roadmap 2025

**InterPayments**

# 2025 Objectives + Goals

How does InterPayments enable Wells Fargo to stimulate continued growth in 2025?

- **2025 Objectives**

- Streamline and improve coordination and communication
- Create visibility and awareness into product roadmap for all stakeholders
- Continue to build our relationship with Wells Fargo Sales Team
- Develop and distribute enablement materials to facilitate partnership growth
- Create feedback loops to fill product gaps and build for areas of future need

- ★ **Goals**

- ☐ Jointly create 2-year product roadmap for Fee recovery
- ☐ Launch 3 integrated ISV packages with InterPayments Integrated Affiliate or Technology Partners (target 6/30/25)
- ☐ \$2.5MM (~10 deals) in incremental direct API pipeline via ISV channel
- ☐ Execute addendum to contract to include new deal registration terms
- ☐ 600 merchants live through E-bill, up from 250

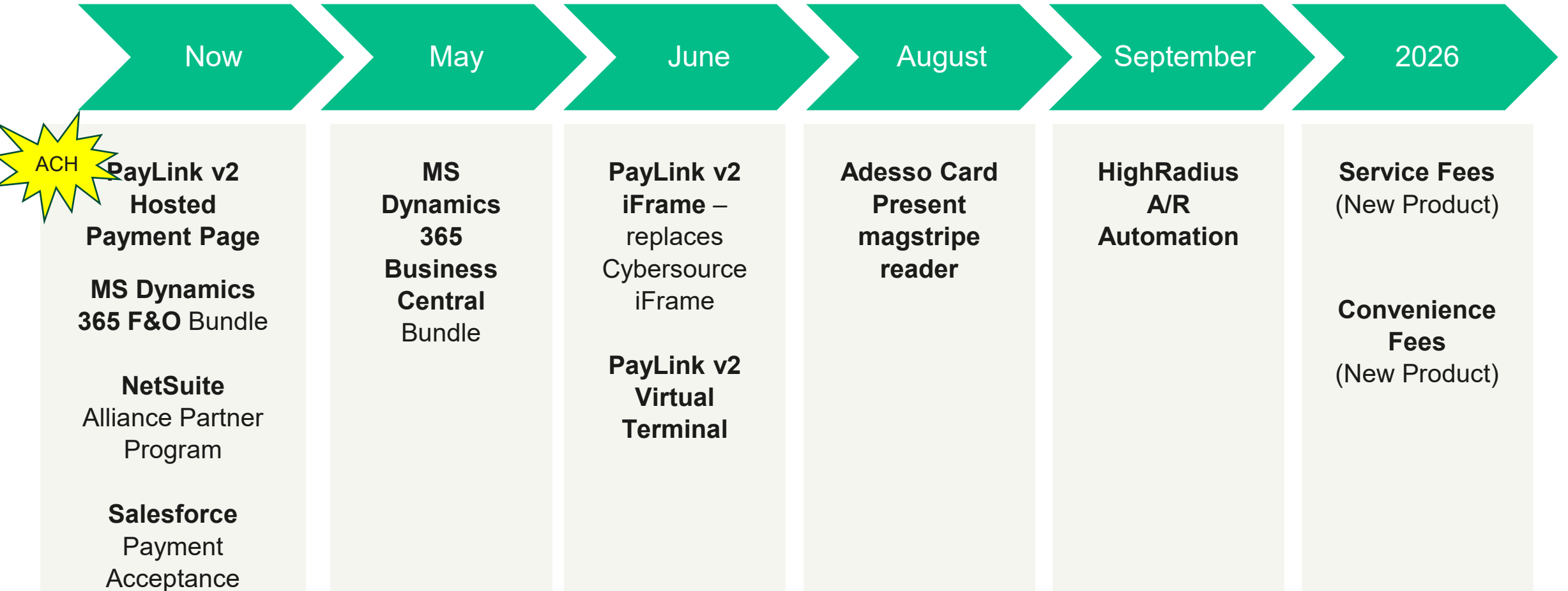
# InterPayments product commitment to Wells Fargo

Quickly addressing product needs to achieve goals

- **Automate/streamline WFPG acceptance with ISV platforms**
  - Trend: more merchant payments consummated on ISV platforms
  - Problem: WFMS needs more ISV integrations with WFPG to attract and maintain merchants
  - Solution: InterPayments enables WFPG integrations with ISVs
  - Examples: FIS' E-Bill (surcharging), product roadmap listed herein
- ★ **Quick product updates and support**
  - Example: Society Insurance and Recurring Billing within E-Bill
  - Example: Rowe Furniture and custom data fields
  - Example: Product roadmap items herein
  - Example **[NEED WFMS HELP]**: WFMS secures Cybersource ACH technical support for InterPayments

# 2025 Product Roadmap

All Extension of Offering



# InterPayments-DynamicsWeb MS Dynamics 365 F&O Bundle

Available Now

Category	Details
Customer Use Case	Accept, surcharge, & reconcile payments within Dynamics F&O
Card Present?	Card Not Present
Payment Methods	Phone Payments Customer Portal Payments
ERP/Payment System	Microsoft Dynamics F&O
WF Products Available	WFPG Only
Customer Segment	Enterprise & SMB, All Verticals
Technology Partner	Red Maple
<i>What is Dynamics 365?</i>	An integrated suite of ERP planning and CRM applications, operated by MSFT.



Microsoft Dynamics 365  
**Finance Operations**



# NetSuite Alliance Partner Program

Available Now

Category	Details
Customer Use Case	Accept, surcharge, & reconcile payments within NetSuite
Card Present?	Card Not Present
Payment Methods	Phone Payments
ERP/Payment System	NetSuite
WF Products Available	WFPG Only
Customer Segment	Enterprise & SMB, All Verticals
Technology Partner	Code of the North
<i>What is Netsuite?</i>	NetSuite is one of the largest cloud-based ERPs globally, serving SMB to enterprise (owned by Oracle).



# NETSUITE

# Video: Surcharging Phone Payments in NetSuite



# InterPayments-Chargent Salesforce Payment Acceptance

Available Now

Category	Details
Customer Use Case	Accept, surcharge, & reconcile payments in Salesforce
Card Present?	Card Not Present
Payment Methods	Phone Payments Customer Portal Payments Website Payments
ERP/Payment System	Salesforce
WF Products Available	WFPG Only
Customer Segment	Enterprise & SMB, All Verticals
Technology Partner	Chargent
<i>What is Netsuite?</i>	Salesforce is a market-leading CRM/Order Management System.

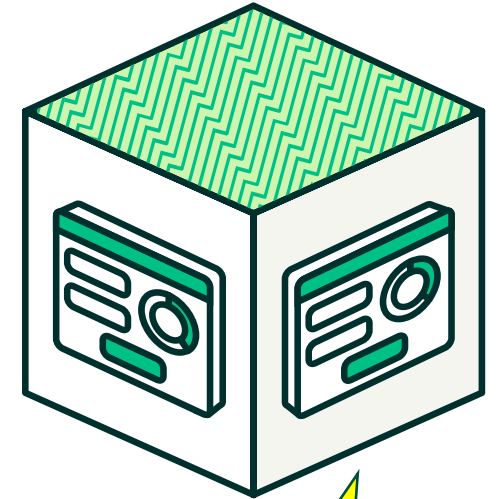




# InterPayments PayLink V2 Hosted Payment Page

Available **April 2025**

Category	Details
Customer Use Case	Replaces the Cybersource Hosted Payment Page with an InterPayments Hosted Payment Page that submits data to Cybersource, but with compliant surcharging built in.
Card Present?	Card Not Present
Payment Methods	Custom Website Customer Portal
ERP/Payment System	Any
WF Products Available	WFPG Only
Customer Segment	Enterprise
Technology Partner	InterPayments Only



Master Halco  
Fencing Supply Group  
HopDox  
Arabian Horse  
Bay Alarm  
Mission Linen  
Bear River Insurance

# InterPayments-DynamicsWeb MS Dynamics 365 BC Bundle

Available **May 2025**

Category	Details
Customer Use Case	Accept, surcharge, & reconcile payments in Dynamics BC
Card Present?	Card Not Present
Payment Methods	Phone Payments Customer Portal Payments
ERP/Payment System	Microsoft Dynamics Business Central
WF Products Available	WFPG Only
Customer Segment	Enterprise & SMB, All Verticals
Technology Partner	Red Maple
<i>What is Dynamics 365?</i>	An integrated suite of ERP planning and CRM applications, operated by MSFT.

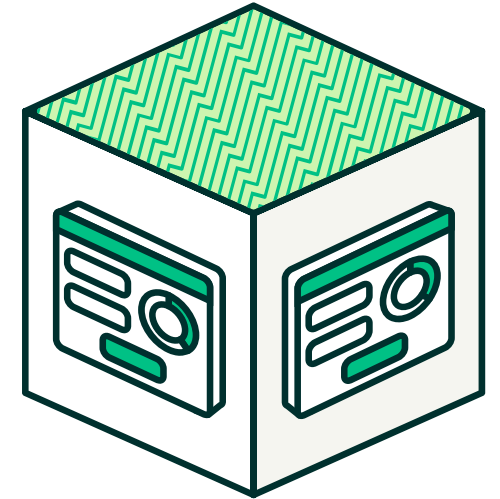


Microsoft Dynamics 365  
**Business Central**

# InterPayments PayLink V2 iFrame

Available **June 2025**

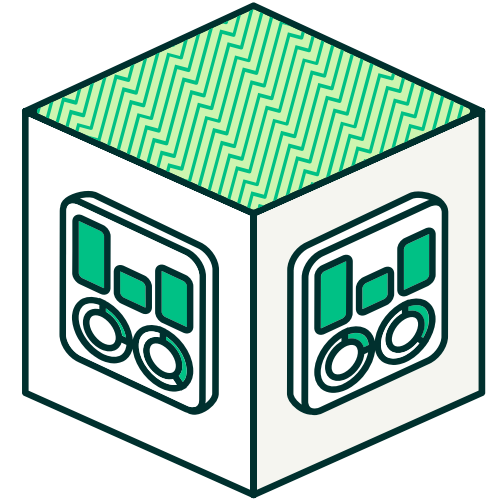
Category	Details
Customer Use Case	Replaces the Cybersource iFrame with an InterPayments iFrame that submits data to Cybersource, but with compliant surcharging built in.
Card Present?	Card Not Present
Payment Methods	Custom Website Customer Portal
ERP/Payment System	Any
WF Products Available	WFPG Only
Customer Segment	Enterprise
Technology Partner	InterPayments Only



# InterPayments PayLink V2 Virtual Terminal

Available **June 2025**

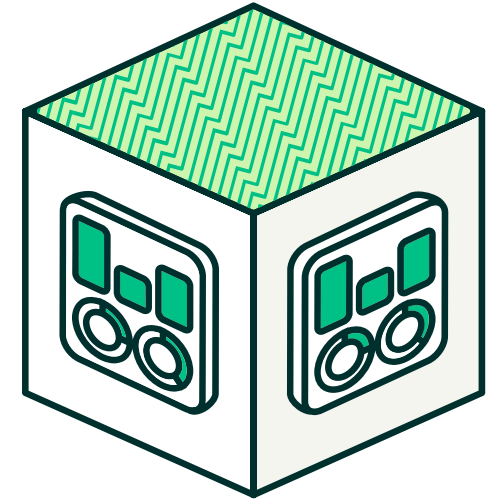
Category	Details
Customer Use Case	Out-of-the-box virtual terminal with compliant precision surcharging built-in
Card Present?	Card Not Present
Payment Methods	Phone Payments Email Link Payments
ERP/Payment System	Any
WF Products Available	WFPG Only
Customer Segment	Enterprise & SMB
Technology Partner	InterPayments Only
<i>What is PayLink v2?</i>	A rebuilt from the ground up upgrade to PayLink, the InterPayments virtual terminal. V2 includes WFPG support.



# Adesso Card Present Magstripe Reader

Available **August 2025**

Category	Details
Customer Use Case	In store surcharging where card is swiped through magstripe reader and connects to PayLink v2
Card Present?	Card Present
Payment Methods	In Store Payments
ERP/Payment System	Any
WF Products Available	WFPG Only
Customer Segment	Enterprise & SMB
Technology Partner	InterPayments Only
<i>What is Adesso?</i>	<u>Adesso</u> is a manufacturer of computer peripheral products, including secure card readers that connect with WFPG.



# InterPayments-HighRadius A/R Automation

Available **September 2025**

Category	Details
Customer Use Case	Accept, surcharge, & reconcile payments in HighRadius
Card Present?	Card Not Present
Payment Methods	Any supported by HighRadius (subject to change)
ERP/Payment System	HighRadius
WF Products Available	WFPG Only
Customer Segment	Enterprise
<i>What is HighRadius?</i>	HighRadius is an ISV platform which automates AR and payment process in the O2C space for the largest merchants.



highradius

Clipper  
Magazine

Enovis

# Alignment and Next Steps

- What's the best forum to revisit this conversation on a regular basis?
- What items would Wells Fargo add to the product roadmap for future consideration?
- What is the best process by which to facilitate ongoing education and training around new features?
- How do we more effectively triage feature requests that correspond to customer demand?
- Do you have a recommendation on how to engage the sales org with this information?
- What marketing or enablement materials would be necessary to make extension of offerings broadly available?
- What are we missing that we would need to include / communicate to unlock commercialization?

# Next Steps

- Map out enablement needs
- Align on training schedule
- Determine right forum for ongoing engagement on product roadmap
- Any other open questions / deliverables