

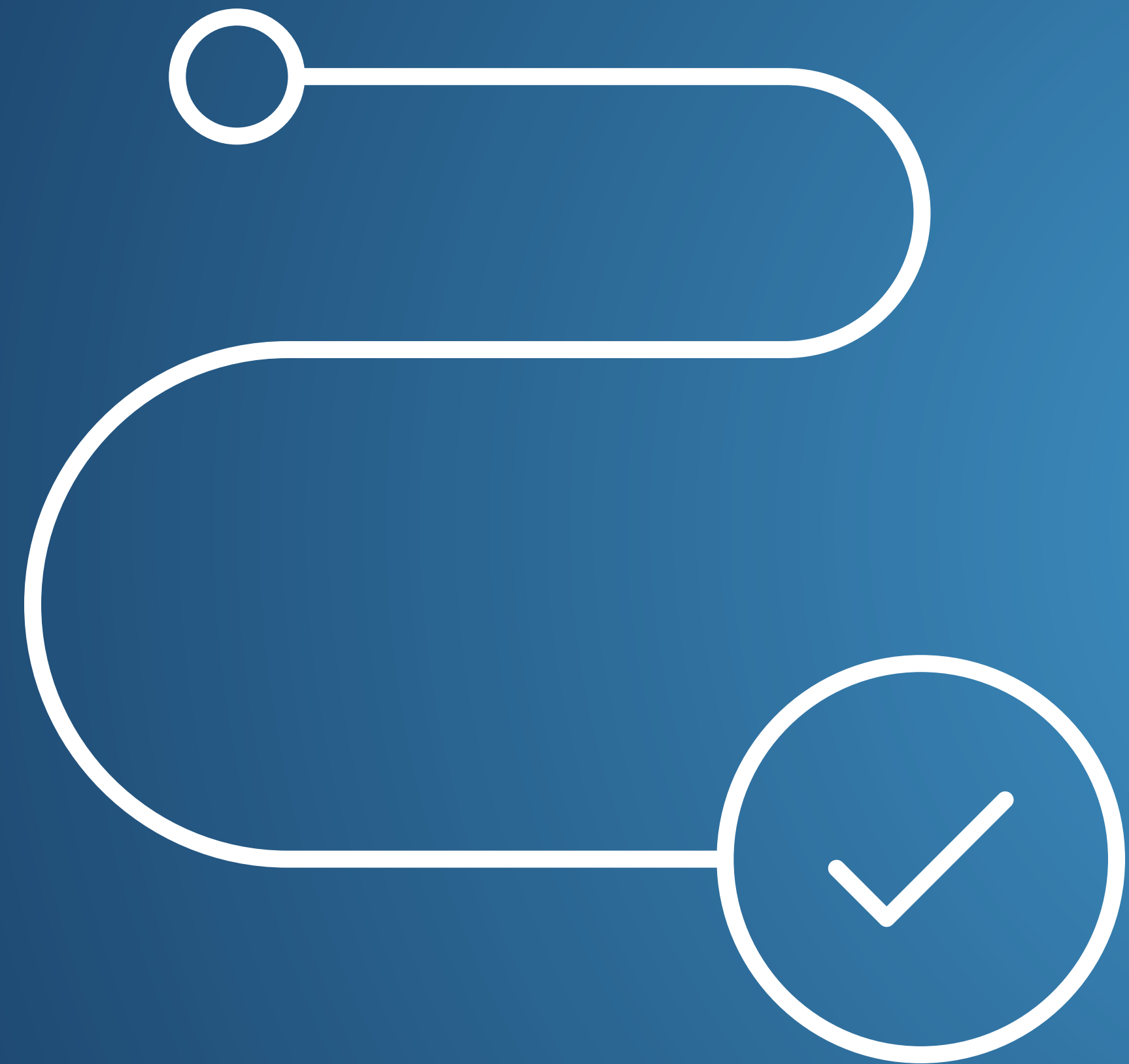
Fortis

Migration Guide

A simplified approach to switching payment providers

Switching payment providers should feel like a business decision—not a technical risk.

Fortis supports a planned, phased, and guided migration designed to minimize disruption, preserve existing workflows, and align with how your business operates today. There is no forced cutover or one-size-fits-all approach.



What to Expect from a Migration



1

Discovery & Planning

We start by understanding your business, systems, workflows, partners, and industry requirements. This allows Fortis to define a migration approach that fits how you operate today—not one that forces change unnecessarily.



2

Application and Underwriting

All payment providers require an application and underwriting review. Fortis guides this process early and transparently, aligning approvals with your broader migration and implementation timeline, so there are no surprises later.



3

Integration and Configuration

Fortis connects through ERP integrations and software plugins designed to work within existing systems. This reduces rework and helps preserve current business processes.



4

Validation Before Go-Live

Payment configurations and workflows are validated before Fortis becomes your active provider. This allows issues to be identified and resolved before any transition is finalized.



5

Controlled Activation

Migration timing is aligned to your business priorities. There is no forced cutover—only a controlled transition supported by Fortis teams, with full visibility as you move toward go-live.

Visibility Throughout the Transition

Throughout the transition, Fortis provides access to the **Fortis Gateway** and the **Fortis Merchant Portal**, giving you insight into configuration, testing, and transaction activity.

The Fortis Merchant Portal also includes a mobile app (iOS and Android), allowing you to:

View transaction and settlement activity

Monitor payment performance

Access key account details from anywhere

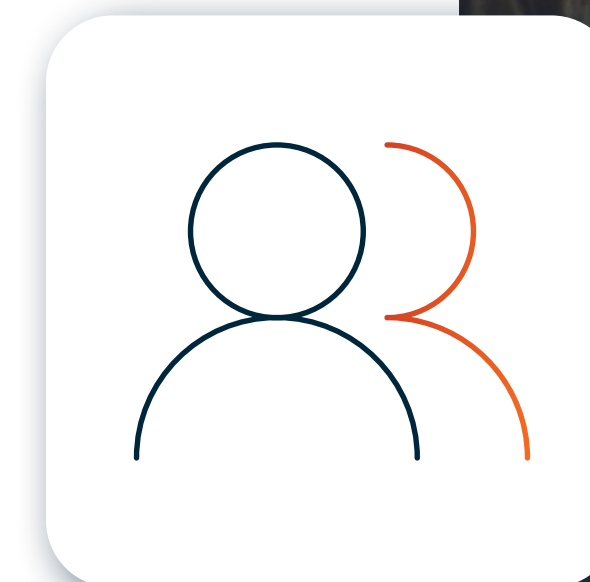
These tools provide clarity and control during migration, and long after go-live.

Working with Your Partner

If you work with a trusted partner or VAR, that relationship remains central throughout the transition.

Your partner continues to lead the broader solution, implementation, and customer relationship. Fortis works alongside them to support the payments portion of the migration, coordinating roles, timelines, and expectations to ensure a smooth experience for everyone involved.

This collaborative approach reflects Fortis' partner-centric model and commitment to shared success.

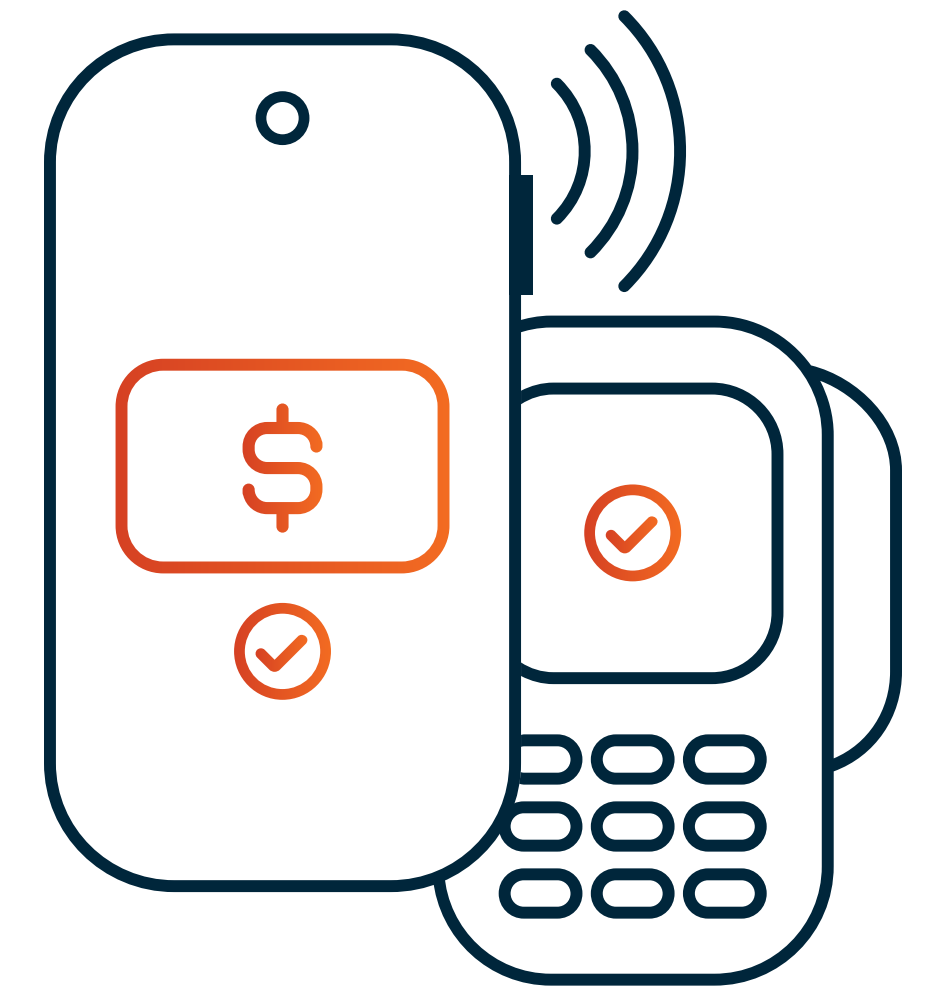


Hardware & Devices

When payment hardware or devices are part of your existing setup, Fortis considers this early in the migration process.

Depending on your setup, this may include reusing existing devices where compatible or introducing new devices as part of the transition. Fortis can also provide payment hardware when needed, coordinating device selection, provisioning, and timing as part of the overall migration plan.

Hardware is provided for purchase, with pricing and options discussed upfront. Any device-related changes are planned alongside software, ERP, PCI, and partner timelines to avoid last-minute dependencies.



PCI Compliance & Security

Payment security and PCI compliance are addressed early—alongside application, underwriting, integrations, and devices

Fortis supports PCI-compliant payment processing and works with you to understand your current compliance posture, helping ensure security requirements are aligned with your systems, devices, and workflows. Depending on your setup, Fortis may support:

Secure handling of cardholder data

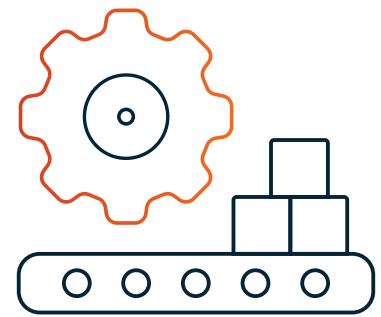
PCI-aligned integrations and payment flows

Guidance on roles & responsibilities related to PCI compliance

This integrated approach helps support a smooth and secure transition.

Industry-Specific Considerations

While the migration framework remains consistent, different industries have unique operational realities. Fortis accounts for these differences when planning and executing a transition.

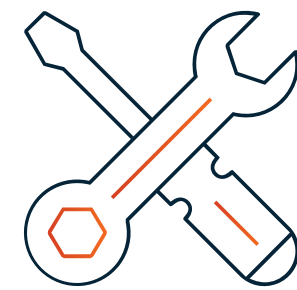


Manufacturing

Manufacturing environments often involve unique ERP workflows, back-office payment processes, and high transaction volumes.

Migration considerations:

- Tight integration with ERP systems for invoicing, accounts receivable, and reporting
- Support for B2B and card-not-present payments
- Alignment with existing approval, reconciliation, and batching processes

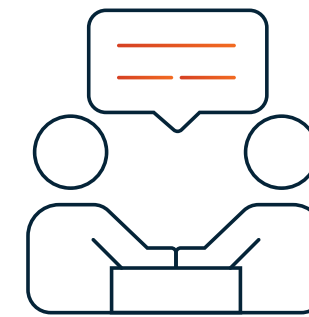


Construction

Construction businesses often manage payments across multiple jobs, locations, and timelines.

Migration considerations:

- Project-based payment tracking
- Field-based payment acceptance and mobility
- Coordination across office teams, field teams, and partners

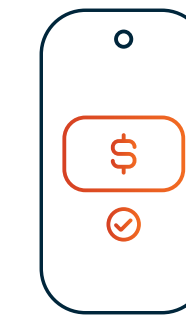


Professional Services

Service-based businesses prioritize billing flexibility and predictable cash flow.

Migration considerations:

- Recurring or milestone-based payments
- Integration with accounting and billing systems
- Minimizing disruption to client-facing payment processes



Retail & Field Services

Retail and field service environments often rely on a combination of in-person and remote payment acceptance.

Migration considerations:

- Point-of-sale or mobile device usage
- Hardware readiness and device replacement planning
- PCI and security alignment across locations



Healthcare

Healthcare organizations operate in highly regulated environments with strict data security and workflow requirements.

Migration considerations:

- Integration with practice management or billing systems
- Secure handling of payment data alongside sensitive patient information
- Support for in-office, remote, and patient-facing payments

Ready to take the next step?

Migration approaches and timelines vary based on platform, configuration, and business needs. Fortis works with you and your partners to define the right path forward for your business.

Contact your **Fortis representative** or call **855-465-9999** to start your migration assessment.

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