

CheckSync

Launch playbook

monit

Launch Playbook

Deploying CheckSync at your organization is very straightforward.

Activities	Tasks
Request CheckSync installation	<ul style="list-style-type: none">❑ Review the CheckSync App Order in the Q2 Developer Portal and add Navigation instructions❑ Monit team adds configuration instructions and Q2 completes the installation❑ FI's Q2 admin adjusts Group settings to deploy to clients
Review Centrix Prerequisites	<ul style="list-style-type: none">❑ Review the prerequisites sheet to confirm the proper app version and licenses❑ If an upgrade is needed, submit request to Q2 to get the latest version installed
Identify Positive Pay users and prospects	<ul style="list-style-type: none">❑ FI pulls the list of current Positive Pay users from internal reports (e.g., Q2 EVE)❑ If also subscribing to MoniCore, FI can review top candidates for Positive Pay based on check writing behaviors via Monit Banker Portal
Review and distribute internal communications and training	<ul style="list-style-type: none">❑ Monit provides access to Customer Hub to access templates and content❑ FI reviews and edits draft communications content❑ Product Owner distributes content to internal stakeholders
Send marketing communications to existing Positive Pay users	<ul style="list-style-type: none">❑ FI reviews and edits draft marketing content provided by Monit❑ Product owner initiates marketing campaigns, including email, website, and Q2 Discover/Smart
Assign follow ups to Treasury team to drive new activations	<ul style="list-style-type: none">❑ Product Owner assigns TM team members for individual client follow up❑ Product Owner tracks activation results

Completing the installation

Upon signing the Sales Order, Q2 will automatically send an email for the App Order to the designated contact at the Financial Institution.

The screenshot shows the Q2 Developer Portal interface for App Order #3124. At the top, there are buttons for 'Install to Staging' and 'Create Ticket'. The main content area is titled 'App Order #3124' and has a 'Waiting For Configuration' status. Below this, there are several fields for application details: Application Name (CheckSync by Monit), App Version Installed (Not Installed), Program (Reseller), Financial Institution Name, Financial Institution Number, Financial Institution Point of Contact, and Requested Date (last week). A 'Deployment Ticket' section shows 'Production Deployment Ticket' with ID 'SDK-46030'. At the bottom, there is an 'App Navigation' section with a red arrow pointing to it, and a 'Collapse' button. The 'App Navigation' section contains the text 'Online banking navigation menu setup.'.

1. App Order Created
All agreements have been fully executed.

2. Production App Configuration
Monit needs to submit their app configurations for the production deployment.

3. App Navigation Setup
Chesapeake Bank needs to submit their navigation setup for this app.

4. App Deployed to Production
Q2 will deploy the app to production once the app production configurations and navigation setup steps have been completed.

5. Completed
App Order has been completed. If you have any issues with this app order, please open a ticket.

1. Log into Q2 Developer Portal, navigate to the App Order in the menu bar, and click on your CheckSync request.
2. Scroll down and Click on the “App Navigation.” We recommend placing the link labeled “CheckSync” just under the Positive Pay header
3. After making the updated, the Monit team will be able to add the Product App configuration instructions on your behalf.
4. Q2 then completes the installation, generally within 8 business days

Review CheckSync installation prerequisites

While the prerequisite review is crucial, we recommend submitting the App Order first to secure your installation's place in Q2's support queue.

1. Complete prerequisites form

- The Monit team will email you a form to review the Centrix version prerequisites
- Please review and return to your Monit liaison. If the prerequisites are met, there are no further steps needed.

2. *Only If needed,* request upgrades from Q2

- If the software version needs to be updated, please submit a ticket to Q2. There is no charge from Q2 to complete the upgrades.
- If you still need to license auto-processing for issued files, reach out to your Q2 CSM.
- In parallel, send an update to your Monit liaison who will escalate to Q2 to prioritize installations and updates

Identifying top targets for CheckSync activation

While you wait for the installation to take place, use this time to identify your top targets for activation

Use a supported
accounting
package

- Review “Identifying Accounting Software Users” guide in the Customer Hub for related techniques
- Survey clients asking which accounting software they use

SMB users
Positive Pay
today

- Review Q2 reporting on Positive Pay enrollees
- Confirm Positive Pay is correctly applied on SMBs operating checking accounts

Priority new
Positive Pay
enrollees

- Review payments reports to determine highest volume check writers

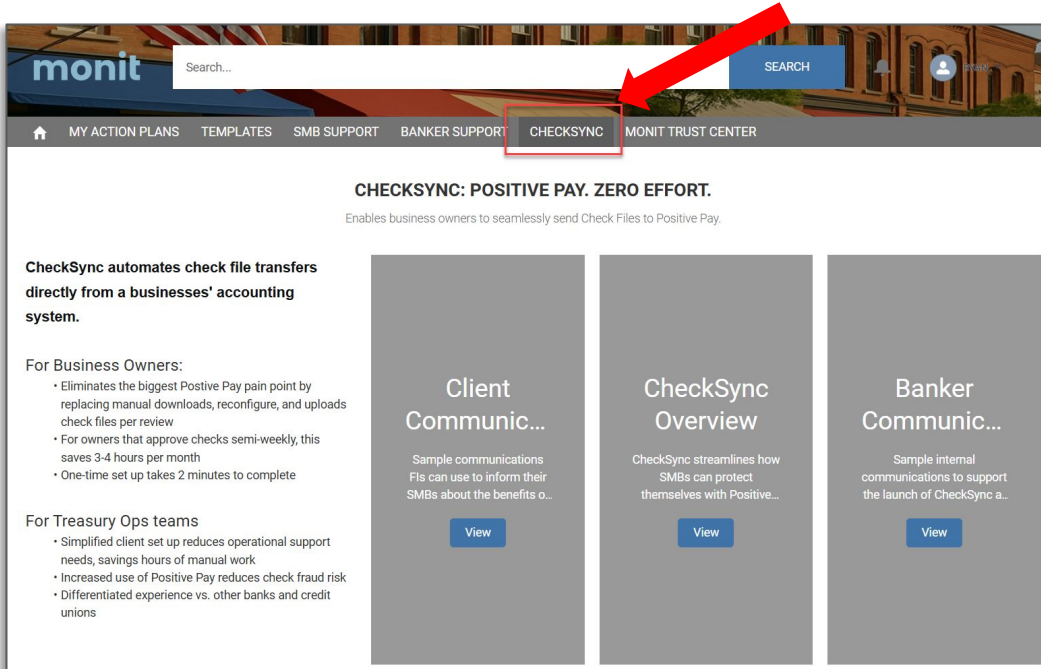
Monit can help identify your top SMB targets

Two options:

1. Send your Q2 EVE report to Monit for analysis
2. Access the Banker Portal to review related NBAs, including Heavy Check Writers and SMBs making subscription payments to supported accounting software

Prepare internal communication and delivery training

You will receive access to Monit's Customer Hub, which includes templated communications documents and training materials to support the CheckSync launch



The screenshot shows the Monit Customer Hub interface. The navigation bar includes 'MY ACTION PLANS', 'TEMPLATES', 'SMB SUPPORT', 'BANKER SUPPORT', 'CHECKSYNC', and 'MONIT TRUST CENTER'. A red arrow points to the 'CHECKSYNC' menu item. Below the navigation bar, the main content area features a heading 'CHECKSYNC: POSITIVE PAY. ZERO EFFORT.' and a sub-heading 'Enables business owners to seamlessly send Check Files to Positive Pay.' The content is organized into three columns. The first column is titled 'CheckSync automates check file transfers directly from a businesses' accounting system.' and lists benefits for Business Owners and Treasury Ops teams. The second column is titled 'Client Communic...' and contains a 'View' button. The third column is titled 'Banker Communic...' and also contains a 'View' button.

- ❑ Review draft communications content
- ❑ Determine which internal stakeholders need to be informed of the new capability
- ❑ Schedule training (if needed) to build awareness and set expectations for the CheckSync launch
- ❑ Delivery the training, follow up with bankers as needed

Prepare and distribute marketing content to targeted clients

Sample content and accelerators are hosted in the Monit Customer Hub.

Messaging

Focus on SMB owner pain points to capture their attention:

- ✓ Save time
- ✓ Reduce Risk
- ✓ Easy Set up
- ✓ Drives Urgency to complete activation

Fraud Protection Made Easy.
Streamline sending your check files by connecting your QuickBooks Online. Check files are sent *automatically*.

[Link Today](#)

Did You Know?
Over **65%** of Check Fraud Victims are Small Business Owners. Peace Of Mind Comes With Automated Check Files Sync

[Link Today](#)

Channels



Email to create SMB awareness



Q2 Discover to encourage activation within online banking



Q2 Smart for reminder messaging

Banker outreach is the biggest driver of CheckSync activation

Personal recommendations from RMs and Treasury teams are influential in getting busy business owners to prioritize CheckSync activation

- 1 Provide calling lists to the bankers responsible for outreach with talking points to encourage SMB activation
- 2 Track progress on the outreach, with reporting shared with the team on activities and outcomes. If possible, track engagement with your CRM
- 3 Capture feedback from clients and bankers and share it with the Monit team.
- 4 Monit will send you a weekly report of clients that started, but did not complete the CheckSync activation. Assign a banker to follow up with these SMBs and offer support to complete activation

Recommended Metrics

Tracking engagement and outcomes helps keep the team focused on progress and the value of the CheckSync deployment

Client engagement metrics

- Total population of Positive Pay users and percentage of CheckSync adoption
- Count and % of the target clients that have activated CheckSync
- New Positive Pay sign ups tied to CheckSync

Performance Tracking

- Total checks processed via CheckSync connection
- Total \$ volume processed via CheckSync
- Average daily exceptions pre and post CheckSync deployment
- Average time to set up new Positive Pay users pre and post CheckSync deployment

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*Actionable Intelligence For Bankers &
Businesses They Serve*

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