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QUICK START AGENT GUIDE

# BECOME A CERTIFIED UNION AGENT

Your guide to becoming a certified Union Agent and help us bring our next-gen purpose built POS to every bar and restaurant nationally.

[TAKE TEST HERE](#)

"I am so happy we switched to Union. Union not only has a better product than any other system, but Union's guest-led mobile ordering is leaps and bounds ahead of other mobile QRs. The guest love it and the fully-funded rewards are an operators' heaven!"

— Bill, Owner at Kung Fu Cantina

Union is the **only purpose-built next-gen hospitality POS** that speeds up service, delights guests, and delivers better margins.

## Why Union Matters:

- Proven to increase revenue, operational efficiencies and guest satisfaction - 98% retention rate
- Designed by industry veterans with the features, functionality and workflows that matter to deliver great experiences at peak times
- Intuitive Modern Guest-Led Digital Menu, Ordering & Payments built for where the industry is going
- Real-Time Customer Insights & Rewards to drive Loyalty
- Open payment architecture and best in class integration giving all partners the power of choice
- 24/7 – Live US-based Support – Call, Text, or Email

## Why to Become Certified:

- **Close More Deals** - Gain in-depth knowledge base access and sales/marketing resources to convert more prospects
- **Early Access & Insights** - Be first to know about new product releases, updates, and industry developments
- **Exclusive Perks** - Receive branded swag, certification credentials, and recognition as a Union expert
- **Competitive Advantage** - Stand out as a certified hospitality expert who can maximize Union's profit-boosting features and guest experience tools

Union is purpose-built for hospitality, giving agents flexibility to build and secure processing portfolios for long-term growth and stability.

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# THE IDEAL CUSTOMER

Union is built to support **high-volume hospitality venues** that prioritize creating thriving social environments where the social experience and atmosphere are the draw.

## BUILT FOR BUSY BARS + RESTAURANTS

- Hospitality venues that combine dining/drinking with entertainment or social activities (watching a game, playing pool, meeting up for a concert)
- Locations serve beer, wine or liquor and its a large portion (if not majority) of their sales
- Venues where atmosphere and experience drive revenue, not just product food quality

## TYPICAL BUSINESS SIZE + VOLUMES

- Annual Revenue: \$1M - \$20M+
- Daily Transaction Volume: 200-2,000+
- Staff Size: 20-200+ employees
- Multiple revenue streams (food, beverage, entertainment, events, merchandise)
- **Smaller?** - That's OK - We support all hospitality operations who meet our requirements.

## MERCHANT REQUIREMENTS:

- Serve Beer, Wine or Liquor
- Reliable Internet Network (or willing to add one)

## WHO WE DO NOT SUPPORT

- Liquor Store
- Quick Service / Counter Service Restaurant
- Coffee + Bakery Locations
- Retail Grocery Store
- Fast Food Locations

## WHAT ABOUT THE SMALLER LOCATIONS?

Every hospitality operator has a **busy** hour. Because of that, our system can support hospitality operators of all sizes as long as they serve beer, wine or liquor.

## UNION PRONTO - RAPID ACTIVATION

Certified agents can offer locations with approved existing WiFi networks reduced configuration fees (\$1,150) and rapid self/agent-led install options.



**BOULDIN ACRES AUSTIN**



**FERG'S TAMPA**



**COWBOYS RED RIVER DANCEHALL DALLAS**



**VIRIDIAN SAN FRANCISCO**



**DUCK DUCK GOOFS BOSTON**



**HULA HUT AUSTIN**

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# SELLING TOGETHER

## **Union mission is to enable everyone to win!**

With our open payment architecture we have built an ecosystem that enables you to support and own processing, while we provide the POS platform merchants love. We support both TSYS and Fiserv.

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### **REMINDER: YOU DON'T HAVE TO SELL UNION. THAT'S WHAT WE'RE HERE FOR.**

#### **You do what you're best at - Sell processing.**

If you bring us into the right conversations with the right merchants, we'll win the POS every single time. Why? Because, we're providing a purpose built solution set that has the features, functionality and tools the operators actually need.

**When you bring us in, we don't touch the processing dollars.** This is your business for the lifetime of the contract. Use this to your advantage to secure your part of the business. Processing cost is the easiest pain point to enter on, if you can do better. Are they interested in Cash Discount/Dual Pricing?

#### **True Partnership means we both win.**

If you do what you do well and we do what we do well - we'll both win every time.

### **YOUR PROCESSING PLAYBOOK**

#### **Know the merchant's current situation:**

- What are their current processing rates?
- Who's their current processor?
- When does their contract expire?
- Have they received "free" hardware before?
- Are they interested in offering Cash Discounting or running a Dual Pricing Strategy to offset fees?

#### **Build your strategy to win them over:**

- Rate Strategy: Can you beat their current rates? Show the savings over time
- Hardware Strategy: How will you compete with "free" hardware offers?
- Contract Strategy: Are they locked in or coming up for renewal? Time your approach
- Cash Discounting/Dual Pricing: Are they familiar with this? Could be your winning differentiator.

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# THE FEATURES THAT MATTER

Union is the **purpose-built next-gen hospitality POS** that speeds up service, delights guests, improves operations and delivers better margins.

## SPEED + SIMPLICITY

- **Lightning Fast:** Support 1000+ tabs with zero lag, even during your busiest nights
- **4-Touch Interface:** Complete any transaction in 4 touches or less, designed for high-volume service
- **One-Touch Manager Alert:** Instantly notify managers via SMS without leaving your station
- **Rapid Close:** Close all walked tabs at once with preset tip %, turning potential losses into revenue
- **Advanced Offline Mode:** Continue operations as normal during internet outages across all terminals

## MODERN GUEST EXPERIENCE

- **Mobile Ordering:** Guests browse, order, and pay from phones - reducing lines, increasing sales
- **Universal Tab Management:** Servers and guests interact with the same tab for seamless service
- **Digital Waitlist:** Guests join waitlist, track status, and order drinks while waiting
- **VIP Status:** Automatically recognize and reward regulars to build lasting loyalty
- **Tap-to-Start:** Secure payment upfront with NFC/QR codes for improved tab security
- **Higher Revenue:** Mobile ordering increases average check size by 28%

## REVENUE BOOSTERS

- **Zero-Cost Rewards:** Union-funded loyalty program boosts sales and satisfaction at no cost to you
- **Sell Everything:** Food, drinks, merchandise, event tickets, and cover charges in one system
- **Compliant Cash Discounting/Dual Pricing:** Turnkey compliant implementation to reduce processing fees
- **30-Day Decline Recovery:** Automatically run declined cards for up to 30 days to capture lost revenue
- **Union Recommendations:** Built-in engine promotes products with a proven 74% sales lift

## ENHANCED OPERATIONS

- **Staff Efficiency:** Optimized workflows enable staff to cover up to 4X more tables
- **Real-Time 86'd Items:** Instantly update menus across all channels
- **Advanced Check Management:** Flexible splitting by seat/count/item, transferring, and joining
- **Best in Class Integrations:** From Reservations to Payroll + Scheduling, partner with the best integration partners for your operations
- **Guest-Led Service Models:** Digital Tab Only, Order and pickup at location or deliver to location.

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# COMMON OBJECTIONS

Union is purpose-built for operators who need speed, reliability, and better margins – **not a generic system designed for masses** with ever increasing costs and little support.

## I'VE NEVER HEARD OF THEM

Just because you haven't heard of Union, doesn't mean they can't support you. Hospitality locations need specialized tools, not generic solutions. The majority of Union replacements are upgrading from Toast.

Alternatives have spread themselves too thin, which is why everyone knows them. Union focuses exclusively on making busy bars and restaurants more profitable and efficient with the right tools.

## HIGH UPFRONT COSTS - FREE HARDWARE

Operator can't afford the cost to switch. Previous POS paid for their hardware.

Union is fully transparent with their fees. We are not in the processing space, so this give our partners the opportunity to win this business. It's a true partnership game with Union + Processing Partner.

## STAFF LOVES CURRENT POS

Are you sure? Modern bars need modern tools.

Union has the most reliable and efficient terminals on the market and with Tap to Pay on iPhone, our Union Pocket handheld is sleeker, faster and more durable than ever.

Plus, our guest-led ordering frees up your team to focus on hospitality, not just order-taking. That's why bartenders rate Union as their preferred POS.

## WE NEED AN ALL-IN-ONE SOLUTION

Being all-in-one shouldn't mean compromising on what matters. All-in-one should be about removing headaches not charging you for things you don't need and making more money off the operator.

Union integrates seamlessly with best-in-class solutions like 7Shifts for payroll and OpenTable for reservations. Why settle for average when you can have excellence where it counts.

## WE'RE UNDER CONTRACT ALREADY

You might not be as locked in as you think.

Send me your agreement – I'll review it and show you how easy switching can be. Most operators are surprised to learn they have options, especially when it comes to better processing rates and better support.

## MOBILE ORDERING WILL RUIN THE EXPERIENCE

Mobile ordering doesn't replace personal service – it enhances it. When guests handle basic ordering themselves, your staff focuses on what matters: creating memorable experiences and building genuine connections.

Union's platform works alongside your service model. Guests still interact with your team for recommendations and personal touches, but staff spend time on hospitality instead of order-taking. Today's guests expect digital convenience.

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# HARDWARE + SETUPS

**Built for speed, reliability and to last.**

We take pride in offering the highest quality, most durable and fastest technology for Terminals, Kitchen Display or Command Centers. All software is iOS based.

Union setups include the latest Apple hardware product - 11" iPad, 13" iPad, and iPhone 12+. All hardware is fully encased in a durable case that will hold up in the busiest of operations.

Union setups are available as either stationary (wall or swivel mount) or handheld.

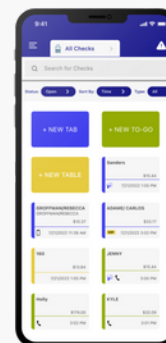
## Stationary (Terminal / Command / KDS)

- Signature - 11" Screen
- Ultra - 13" Screen

## Handheld

- Union Pocket features Tap to Pay on iPhone
- Union, iPad Mini with card reader

See updated pricing sheet [here](#).



**NEXT-GEN  
100% CARD READER  
FREE HANDHELD  
WITH TAP TO PAY  
ON IPHONE 12+ (BRING  
YOUR OWN DEVICE)**



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# PRICING: SAAS + ACTIVATION

## Transparent + Honest Pricing

Partnering with Union, means an operator is getting access to Union's complete venue operating system as well as our network of integrated partners.

### UNION - BUILT FOR YOUR NEEDS

Union is a complete POS system that offers operators the tools and support they need for success. All partners get access to our **complete POS feature** set and 24/7 US based Support Team (no extra fees)

Every Partnership Includes:

- Mobile Launch Points to enable access to merchant's on-premise Union mobile experience. This includes automatic participation in Union's Fully Funded Rewards + Recommendation Program.
- API + Integration Access to our our Best in Class Integration Solution Set
- Automatic POS feature updates
- Dedicated onboarding manager to support activation. Providing accurate, up to date information will speed up onboarding

**See Sample Quote - [here](#)**

### PRICING

**\$89 SAAS** per month, per terminal with reader

**\$2050 Configuration** (Includes Hardware and Software Configuration and Complete Menu and Account Setup)

If existing network is not available, we can provide a complete network for an additional fee. Service includes software for defined network including security, PoE Switch and hardware configuration.

Hardware Package (Purchased Cost + 20%)  
Shipping (Based on Terminal Count, ~\$75 each)

### **Union Pronto now available to certified agents!**

Pronto gives certified agents the ability to offer self-install options and reduced configuration fees (\$1,150 vs. \$2,050 standard) to any location with a pre-existing network that has been approved. Network must meet requirements.

# VALIDATING CONNECTIVITY

## NETWORK IS REQUIRED FOR PRONTO

Reliable Internet and network connectivity is essential to ensuring Union can operate successfully in the operation. Union Terminals, Printers and Handhelds speak to one and other over this network.

- Find the Merchant's Wifi Network
- Validate that this Network is dedicated to BOH operations and is not a Guest Wifi Network
- Ensure the Wifi Network can cover the full roaming distance of all the handhelds
- Validate Network has strong enough speed at this further handheld roaming distance
- It is recommended the Network is located by the main terminal setup.
- Network Unit needs a port for each of the printers being used
- If Network is not viable - Union can provide a sufficient network at an additional cost.

## Ensuring a Network is viable for Union Lite

Union's POS requires a network to support the connectivity of the system from terminals to handhelds to printers.

### DID YOU KNOW?

If you visit - <https://fiber.google.com/speedtest/> while on the Merchant's internet, you can validate the connectivity and speed of the current internet.

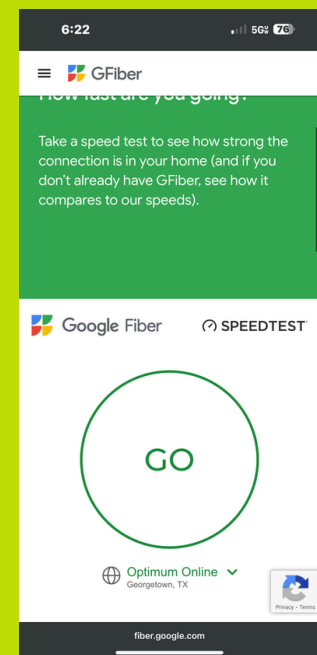
### Speed Requirements:

- +20mps Download
- +10mps for Upload

### If Network fails:

An appropriate network will need to be purchased before install can happen. Union can provide a network and support if applicable.

[More](#) on Network Needs





# KNOW THE POS ESSENTIALS

## Knowing what you need to know.

Hospitality is about the service of others. If you can't service your partners, how can they service their guests. Learn the Union POS basics.

### KEY FOH TRAINING VIDEOS:

- [Start a Tab on the Union POS](#)
- [Navigating the Tab Screen](#)
- [The Power of the Long Press](#)
- [All About Modifiers/Modifier Groups](#)
- [How to Split a Tab](#)
- [How to Join Tabs](#)
- [How to Transfer a Tab](#)
- [How to Enter Tips](#)
- [Running End of Shift Checkout](#)
- [How to Closing All Walked Tabs](#)

### KEY BOH/MANAGER TRAINING VIDEOS:

- [Tax Rule Setting + Applications](#)
- [How to Create Modifiers/Groups](#)

### DID YOU KNOW?

Our [\*\*Union Learning Center\*\*](#) has a video for nearly every feature and functionality available in our POS. Videos are added weekly and can be accessed at anytime by partners, managers and staff.

### TRAININGS + NEW FEATURES WEBINAR

We hold weekly LIVE virtual open office hour training where you can speak live with our trainers and learn the ins and outs of any part of our system.

**FOH Training - Monday @ 12PM CST**

**BOH/Manager Training - Tuesday @ 1PM CST**

You can access these sessions via our Onboarding Platform or via our partnership team. We also release trainings on all new features/functionality via our product release notes in our portal.

# REFERRING A MERCHANT

Union is built to support **high-volume hospitality venues** that prioritize creating thriving social environments where the experience and atmosphere are the draw, not just the food or service.

## KEY THINGS NEEDED FOR A DEMO

- Venue Name + Location (City or Zip)
- Venue Contact, Phone, Email and Role
- Secondary Venue Contact (if any)
- Is Alcohol Served (% of Revenue)
- Current POS + Contract Status
- Current Pain Points
- What they are seeking in a new POS
- Any Known Timeline (Decision, Install)
- Cash Discounting/Dual Pricing Discussed
- Rough Terminal / Hardware Needs?
- What is the plan for Hardware Costs?
- 3 Ideal Times (Merchant must be in quiet spot with computer screen for duration)
- Demos can take 45-60 mins, please have all parties join promptly or reschedule
- Agent Contact Info

## TOP AGENT TIP

Don't worry about selling Union. --- You do what you're best at **sell the processing**. If you bring us into the right conversations with the right merchants, we'll win the POS every single time with you.

## BOOKING A DEMO

Merchant Demos should be booked via our Agent Demo Request form ([HERE](#)) or via your partnership manager.

Contact - [partnerships@getunion.com](mailto:partnerships@getunion.com) for your contact.

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# READY TO GET CERTIFIED

Union is the only next-gen hospitality platform that is designed to enable everyone to win - **from guest, staff, owners, brands and you - everyone wins!**

## ARE YOU READY - DO YOU HAVE THE BASICS DOWN?

- Do you know Union's core value proposition?
- Can you identify Union's ideal customer profile?
- Do you understand Union's current scale and geographic reach?
- Can you explain what all Union partners have in common?
- Can you describe Union's guest-led experience and its benefits?
- Are you familiar with the key purpose-built hospitality features?
- Can you explain your role vs. Union's role in the partnership?
- Do you understand Union Pronto and how certified agents can use to reduce configuration fees and network requirements?
- Do you know Union's fee structure and revenue model?
- Can you identify Union's main competitors and common merchant pain points?
- Do you understand Union's activation timeline expectations?
- Do you know Union's hardware operating system specifications?
- Do you know how to request a merchant and demo and the required information?
- Are you excited to partner with Union and enables every bar and restaurant to know they have better options to grow their business?

**READY TO TAKE THE TEST**

**[CLICK TO TAKE TEST](#)**

### TOP AGENT TIP

Certification requires a pass score of 80%. Test can be taken multiple times. Once you are certified, you will receive additional resources and support via email and our certified agent resource center. This resource center includes marketing collateral and videos, customizable enablements tools, sales playbooks, case studies, and additional training tools.

Learn more? **See our full Agent Tool + Training Guide [here](#).**

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