

## EMS AGENT CHECKLIST

### DEALS WITHOUT TERMINALS

Complete only if no terminal is being shipped. Please send separate order form (on EMSU) if EMS needs to ship a terminal.

☐ EMS Install/Deployment ☐ Send Welcome Kit \_\_\_\_\_  
Terminal Type \_\_\_\_\_

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ EMS ISSUED OFFICE NUMBER: \_\_\_\_\_

MERCHANT DBA: \_\_\_\_\_

SALES REP: \_\_\_\_\_

MERCHANT EMAIL: \_\_\_\_\_  
Required on All Deals

#### PRICING MODEL

- ☐ Dual Pricing  
☐ 3% ☐ 4% ☐ Flat Rate \_\_\_\_\_  
☐ Surcharge  
☐ 3% ☐ 4% ☐ Flat Rate \_\_\_\_\_

#### TERMINAL INFORMATION

- ☐ Terminal Type: \_\_\_\_\_  
 Number of Terminals: \_\_\_\_\_  
☐ IP ☐ Dial Up ☐ Wireless  
 If Wireless:  
☐ WiFi ☐ EMS to Supply SIM ☐ Merchant to Supply SIM  
☐ Debit  
☐ Internal Debit  
☐ External, Pin Pad Model: \_\_\_\_\_  
☐ EBT (FNF #) \_\_\_\_\_

#### TERMINAL APPLICATION

- ☐ Retail  
☐ Retail with Tips  
☐ Restaurant with Tip Adjust  
☐ Counter Service (Tip @ Sale)  
☐ Surcharge Processing  
☐ MOTO (20% + Keyed)

#### PAYMENT GATEWAY CONFIGURATION

- ☐ Gateway Name: \_\_\_\_\_  
☐ EMS Billing the merchant (require fees on e-commerce line of the merchant agreement)  
☐ Agent / 3<sup>rd</sup> Party / Existing Gateway (EMS only builds a VAR sheet)  
☐ With Swiper  
 Model: \_\_\_\_\_  
☐ EMSmobile \_\_\_\_\_

(required for all payment gateway and virtual terminal accounts)

Please check off below all options desired by the merchant. This will allow us to provision the proper payment gateway.

- ☐ Mobile App (if card reader required, provide EMSmobile)  
☐ Virtual Terminal Only (includes email invoicing & Secure Vault)  
☐ Quickbooks Integration  
☐ Level III Processing  
☐ Account Updater (extra cost applies)  
☐ Integration to POS Software\*  
☐ POS Software Name \_\_\_\_\_  
☐ API Integration to Shopping Cart\*  
☐ Shopping Cart Name \_\_\_\_\_

#### POS SOFTWARE INFORMATION

- ☐ Total Touch POS  
☐ MaxxPay  
☐ External Software: \_\_\_\_\_  
☐ Software Version: \_\_\_\_\_  
☐ VAR Contact Info: \_\_\_\_\_  
 \_\_\_\_\_  
☐ How Many Lanes: \_\_\_\_\_

Note: Merchant is responsible for reprogramming which may require cost from the VAR.

#### REQUIRED DOCUMENTATION

- ☐ Merchant Application  
☐ 3 Most Recent Processing Statements  
☐ Disclosure Page  
☐ Drivers License  
☐ Inside Photo Showing Inventory  
☐ Outside Photo Showing Signage  
☐ Voided Check  
☐ W9  
☐ Multi-Merchant \_\_\_\_\_ of \_\_\_\_\_  
 Additional Location \_\_\_\_\_ of \_\_\_\_\_

#### REQUIRED PREVIOUS PROCESSING INFORMATION

(SQUARE / STRIPE / PAYPAL / ETC.)

- ☐ Website / Processor: \_\_\_\_\_  
☐ Login Name: \_\_\_\_\_ ☐ Password: \_\_\_\_\_

Other Information: \_\_\_\_\_

\_\_\_\_\_  
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