

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 / 3rd 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: _____

