

Genius Boarding Experience



Genius Sales Boarding Checklist

The Genius Sales Boarding Checklist is required to be submitted with your application. This will assist our back office support teams in properly configuring your client's new systems and hardware.

Filling out the Sales Boarding Checklist

- Choose the right "Business Type" – Retail, CNP, Tip Adjust, eCommerce, Restaurant, and Tip and Time of Sale
- Select the correct Genius Plan (Essential or Complete)
- Does your merchant need to enable stand alone invoicing, order ahead, or virtual terminal?
- Do they need EBT, Gift Cards, Cash Discount, or Surcharge?
- Are we collecting sales tax? Are you providing an inventory? Is timeclock needed?

Once you've completed filling out the checklist, it can be emailed to geniusboarding@globalpay.com. Additionally, be sure to upload it in the Document Attachment section of ELAPP® under "Ovation Support Documentation."

Expectations after Application Approval

You will be boarded into Genius Back Office

- Genius Account Number and Profile created
- Username and Password Created
- Credential email sent to the merchant

Next, you will receive a welcome email

- This email will be sent to the merchant specific to the product they are using i.e. Genius Mobile, Genius Handheld, Genius Countertop.
- The welcome email will include
 - Contact information
 - Resources for speedy set up process
 - Access to the Genius Portal
 - For Mobile only: Mobile application download links (Apple & Android)

Lastly, a live phone call will take place two days later

- ***If merchant is already processing transactions, we assume they're operational and will not reach out***
- The purpose of the call is to make sure merchant received welcome email and credentials, and confirm if training is required
- The Genius Boarding team will make 3 attempts to connect with merchant
- If they do not connect with merchant, they will send a final email from geniusboarding@globalpay.com

Merchant Training

Merchants have the opportunity to request training during their welcome call, which will be conducted via a phone conversation with a live representative.

Genius Unboxing and Setup

Your hardware should arrive within two days of approval. The [Genius Help Center](#) goes into detail for the entire unboxing and setup process and has a chat feature if you have any questions.

Additional Resources

Genius Technical Support

- Phone: (866) 646-7648
- Email: Geniussupport@globalpay.com

Partner Sales Support

- Phone: (877) 608-6599
- Email: bf_partnersalesupport@globalpay.com

Customer Support (Merchant Help)

- Phone: (800) 654-9256
- Email: bf_customersupport@globalpay.com