



Sales Boarding Checklist

Sales Agent Name:

BUSINESS SPECIFICATIONS

Sales Agent Phone:

DBA Name (displays on receipt):

DBA Phone (displays on receipt):

Business Type (choose one):

Retail

Restaurant

CNP

E-Commerce

Tipping Method:

Note: Mobile does not support tip adjust

Tip Adjust

Tip at time of Sale

Genius Essentials

Yes

No

Genius Complete

Yes

No

TSEP TID

Enable Stand Alone Invoicing?

Requires additional TSEP TID in Boarding Application

Yes

No

Enable Stand Alone Order Ahead?

Requires additional TSEP TID in Boarding Application

Yes

No

Enable Stand Alone Virtual Terminal?

Requires additional TSEP TID in Boarding Application

Yes

No

TSEP TID

EBT

*Merchant must be enabled for PIN Debit & EBT
PIN & EBT Pricing must be on the MID!*

Yes

No

Enable Stand Alone Gift Card

Requires separate Gift Card application

Yes

No

Enable Cash Discount?

Terminal+ & Register ONLY

Yes

Rate

Enable Surcharge?

Rate can not exceed 3% - Terminal+ & Register ONLY

Yes

Rate

Merchant to collect sales tax?

Yes

No

If yes, what are the tax rates?

Tax Name 1

Rate

Tax Name 2

Rate

Tax Name 3

Rate

Tax Name 4

Rate

Menu or inventory list attached?

Yes

No

Timeclock use required?

Yes

No