Sales Boarding Checklist
BUSINESS SPECIFICATIONS

Sales Agent Name:
Sales Agent Email:

Merchant information:

DBA Name (displays on receipt):
DBA Phone (displays on receipt):
Business Type (choose one): ☑ Retail ☐ Restaurant ☐ CNP

Tipping Method:
Note: Mobile does not support tip adjust
☐ Tip Adjust ☐ Tip at time of Sale

Software Plan - Pick one

Genius Essentials	☐
Genius Advanced	☐
Genius Complete shops	☐
Genius Complete for service businesses	☐
Genius Complete for age regulated	☐

Software Add Ons

Enable Appointment Scheduler	☐ Yes	☐ No
Enable Gift	☐ Yes	☐ No

Pricing Add Ons

EBT Merchant must be enabled for PIN Debit & EBT PIN & EBT Pricing must be on the MID!	☐ Yes		☐ No
Enable Surcharge? Rate can not exceed 3% - Handheld & Countertop ONLY	☐ Yes	Rate	
Enable Dual Pricing? Handheld & Countertop ONLY	☐ Yes	Rate	

EBT cannot be utilized if Dual Pricing is selected

Merchant to collect sales tax?	☐ Yes		☐ No
If yes, what are the tax rates?			
Tax Name 1		Rate	
Tax Name 2		Rate	

Menu or inventory list attached?	☐ Yes	☐ No
Timeclock Managment required? Countertop ONLY	☐ Yes	☐ No