

## account setup

**Q** How does the convenience fee to cardholders work?

**A** The merchant can decide if they want to charge a convenience fee to cardholders to help pay for the costs of accepting online orders. A \$1.99 convenience fee is customary, but merchants can charge more or less at their discretion. The convenience fee is charged to the cardholder on each transaction, and funded to the merchant as a part of their batch. It is not recommended to charge a convenience fee on dine-in orders.

**Q** Can merchants offer a Cash Option?

**A** Yes, merchants can offer a cash option. The convenience fee is billed to customers regardless of the customer choosing cash or credit. Cash orders do not incur the discount rate.

**Q** Can ISO generate Revenue on the Convenience Fee?

**A** Yes, however, the method depends on whether you are boarding through FD or TSYS.  
**FOR FIRST DATA** // You can set the amount you would like to make in the MX™ Merchant Transaction Fee portion of the application on MX™ ISO Agent.

**FOR TSYS** // You can set the amount you would like to make in the Per Item Fee portion of the application on MX™ ISO Agent.

As an example for either set-up, if the merchant is charging \$2.50, and you would like to make \$0.50, set the MX™ Merchant Transaction Fee/Per Item Fee to \$0.50 above your Schedule A cost.

**Q** Does a currently boarded merchant need a new MID?

**A** Yes, e|tab accounts must be underwritten separately as an internet account. And because the pricing concept is different from a standard processing account, it needs to be separate. If the merchant will be utilizing e|tab Online and Dine-In, both should be written as separate merchant accounts. This is ideal for merchants who have an existing POS/terminal and not interested in switching processors at this time. The e|tab account runs independently of their existing merchant account.

**Q** What is e|tab Contactless Dine-In and how does it work?

**A** e|tab Contactless Dine-In is an optional feature on e|tab allowing customers to order and pay for dine-in orders from their own device. The merchant is provided with custom QR-Code Table Cards that the customer scans using their smartphone camera. The customer enters their table number and creates and pays for their order. The order is sent directly to the restaurant staff in the fashion that they choose.

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**Q** How does the merchant receive the orders placed on e|tab?

**A** It is recommended the merchant purchase an e|tab Smart Printer. The e|tab smart printer prints financial receipts and kitchen prep copies for each order received. In addition (or alternatively), the merchant can review orders via our Web-Based Order Management dashboard from any web-enabled device (laptop, tablet, etc). The merchant may also choose to receive email and SMS Alerts for new orders.

## submitting deals

**Q** How should I configure the Funding and Discount Method?

**A** All e|tab merchants qualify for Next Day Funding, subject to batch time (FDMS or TSYS is fine). The agent must adjust the batch time in MX™ Merchant if the default (4AM EDT) needs to be changed.  
The discount method can be set to daily or monthly. If charging a flat rate, typically daily discount is used. It is not recommended to use daily discount if the account is priced at interchange-plus. Please be sure to explain the differences to your merchant.

**Q** How do I submit the e|tab setup forms?

**A** When you are ready to submit a new e|tab account, you'll need to submit the required documentation to our submission portal.

**Access portal [HERE](#).**

The account process will begin within 1-2 business days of submission. For status updates email [projects@pps.io](mailto:projects@pps.io).

The portal will ask for the DBA, MID, Check Boxes for Major Setup Components, and the Sales Rep's Email. It then provides a spot for the e|tab Onboarding Application and the Order Form to be uploaded, and another to upload a scanned copy of a menu if a web URL is not provided to build the menu.

Upon submission to the form, our team ([projects@pps.io](mailto:projects@pps.io)) will receive an email advising a new submission has been received. In addition, an email will be automatically sent out to the submitter and the agent stating that we have received the new submission, and will reach out with any questions.

**Q** Is e|tab integrated into any Restaurant POS Systems?

**A** YES! Union POS has e|tab fully integrated. The process for submitting the e|tab account is the same. If the merchant is using Union POS, please indicate this when submitting and the implementation team will work with Union to complete the setup with the merchant.

**Q** What needs to be submitted via the Portal?

**A** Once the account has been boarded by Underwriting:

- Scanned Copy of Menu OR Menu URL
- Equipment Order Form (if purchasing a printer, shipping preference)
- e|tab Onboarding Application

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# recommended hardware

**Q** What is the difference between the smart printer and the kitchen printer?

**A** **SMART PRINTER** // Required if the merchant wants any ticket printing at their location (highly recommended). The smart printer is a thermal receipt printer that connects to the merchants network via **ethernet only (10ft cable included)**. It communicates directly with the e|tab cloud server and prints financial and kitchen styler receipts.

**KITCHEN PRINTER** // (Optional) The kitchen printer is an impact printer (non-thermal, requires ink ribbon) that can work in combination with the smart printer to push standard kitchen receipt copies to the kitchen. In order to use the kitchen printer, the smart printer must also be purchased. The agent must also be involved in the deployment of a kitchen printer, as on-site programming is required to let the printers communicate together.

**Q** Can I purchase my own printers?

**A** No, the printers are a special order e|tab printer that must be programmed to the e|tab cloud server prior to deployment. The model is not publicly available, and it is not able to be programmed off site.

**Q** How do I pay for the printers?

**A** Printer orders are billed directly to the ISO. You will need to fill out an e|tab Equipment Order Form for e|tab printers.  
If submitting multiple orders, we are offering the option to pay new deployments weekly. Please ask about this when you call David Welesko for initial setup, an ACH authorization form will be requested.

# implementation process

**Q** How long does it take for an e|tab account to be activated?

**A** On average, e|tab accounts take 5-7 business days to be activated. In order to accomplish this timeline, the following components are extremely important:

**WEB IMPLEMENTATION** (pg 2 of onboarding application) // The agent/ISO must provide a clear method for implementing e|tab on the merchants web platforms. e|tab offers four standard options.

— **e|tab on Existing Website:** If the merchant has an existing website, the agent can mark Priority, the Merchant, or a Web Developer as the responsible party for implementing on the merchant's website. If Priority is the responsible party, the login credentials for the website (not the domain) must be provided. If the Merchant is the responsible party, the e|tab ordering link will be provided directly to the merchant to implement on their own, and if a Web Developer is the responsible party, we ask that their name, phone numbers, and email address be provided.

— **e|tab as a Website (Domain Forwarding):** This option allows for e|tab to function as the merchants website. In order to use this option, the domain credentials **MUST** be submitted with the application. The e|tab platform includes the merchants phone number, address, branding and entire takeout/delivery menu, so this option has everything the merchant needs to display to their customers to successfully implement e|tab Online Ordering with no additional steps.

— **Social Media:** It is highly recommended that each e|tab account be submitted with at least one set of social media login credentials. Facebook is the primary option that is used, as it allows for a “shop now” button... but merchants can submit login credentials to any other platforms they have login access to.

**MENU INFORMATION** // A scanned menu copy OR a web URL showing the entire menu with updated pricing is required. Accounts submitted without menu information will be turned back to the agent immediately. Please be sure to ask the merchant if they plan on updating their pricing prior to deployment. If so, please delay the submission until accurate pricing is available, or this will slow down the deployment.

**MERCHANT & AGENT ENGAGEMENT** // Please be sure to let your merchant know that within a few days after sign up, a **member of the e|tab team** will be reaching out to them to attempt to assist with the installation of their printer (if applicable) and with any applicable questions. The merchant **cannot** go live until the necessary hardware is installed, and the button is placed on the web. As such, merchant cooperation as necessary, is extremely important. Please emphasize this. Alternatively, if the agent would like to be a part of the install process, they are welcome to do so in order to speed up deployment.

**Q Who should I call with questions?**

**A** Please contact your RM or ECM. You may also call the Relationship Management Team (844) 225-2674 or email [RMTeam@pps.io](mailto:RMTeam@pps.io).

**Q Where can I get more information?**

**A** The application, order form, and more information are readily available in MX™ ISO/Agent folders under e|tab and on Priority University. Priority University also includes a link to a demo website, and instructions on how to show off the e|tab platform to your clients.

**ONLINE ORDERING DEMO SITE** <https://e-tab.com/olodemo>

**CONTACTLESS DINE-IN ORDERING DEMO SITE** <https://e-tab.com/dineindemo>