

Enrolling in E-Pay

Before using E-Pay, the Merchant accounts will need to be setup. You can setup a single account or several, if needed. Setup is only a few quick steps.

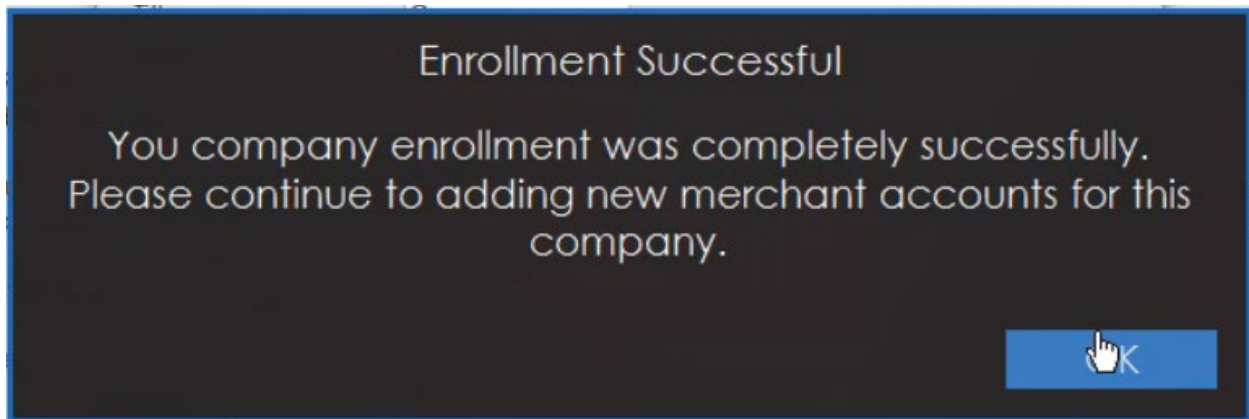
To enroll, click on Settings, the Merchant Account tab, then the Begin Enrollment button.

The screenshot shows the 'SETTINGS' page in a web application. The top navigation bar includes links: DASHBOARD, REPORTS, ACCOUNTING, ROLODEX, VIEW, EXPORT, PORTAL, SNAPSHOT, BARCODE, **1 SETTINGS**, SUPPORT, and HELP. Below the navigation bar is a search field labeled 'Search Records By' with a dropdown menu set to 'Last Name'. The main content area is titled 'SETTINGS' and contains a row of tabs: Preferences, Funeral Home Info, Funeral Home Defaults, Staff, Corporation Info, **2 Merchant Accounts**, Client Type Settings, Bar Code Setup, Tasks, Profile Settings, Resource Setup, and FamilyLink. Below the tabs is a button labeled **3 BEGIN ENROLLMENT**. A red box highlights this button. Below the button, there is a text block that reads: 'SRS is excited to release SRSPay, the easiest way for families to pay their funeral bill! SRSPay can be added to your program free of charge with no monthly fees*, and accepts Visa, Mastercard, Discover, and American Express payments! Click the Enrollment button to start receiving payments. A merchant account will be created which will be used to receive payments either electronically or via a card reader. Activation of the merchant account will take 24-36 hours after the enrollment is completed. Should you have any questions, please contact SRS Computing Solutions at (800) 797-4861. *Standard credit card rates apply.'

Enter the company's information using the personal information for the individual attached to the company bank accounts. Click **Save** to continue. All information is confidential and is used for Vantage to confirm your business entity with the IRS.

The screenshot shows the 'Enter Company Enrollment Information' form. The form is titled 'Enter Company Enrollment Information' and has a sub-header 'Company and Owner Identification (Account Signer)'. The form contains the following fields: Company Name: General Funeral Homes; Owner First/Last Name: Emily Smith; Title: Owner; Date of Birth: 4/15/1965; SSN: 123-45-6789; Address 1: 6021 Wallace Road; Address 2: ; City, State Zip: Wexford PA 15090; Day Phone: 800-797-4861; Evening Phone: ; Email: esmith@generalfh.com. At the bottom of the form are two buttons: **SAVE** and **CANCEL**. A red box highlights the entire form area.

You will see a confirmation message that the information was saved and enrolled successfully.



This will take you back to the Merchants Account tab. Click the **Add Account** icon to add a Merchant Account.

SETTINGS

Preferences

Funeral Home Info

Funeral Home Defaults

Staff

Corporation Info

Merchant Accounts

Client Type Settings

Bar Code Setup

Tasks

Profile Settings

Resource Setup

FamilyLink

+ ACCOUNT

REFRESH

Account Nickname	Bank	Account #	Corporation	GL Account	# Branches	Status

ACCOUNT SUMMARY INFORMATION

EDIT

Account Nickname: No Selection

Account Status: —

ACCOUNT CORPORATION & BRANCH SUMMARY

EDIT

Corporation: Corporation:

GL Account: GL Account:

Complete this section with the company's legal name, address, and EIN (if applicable).]

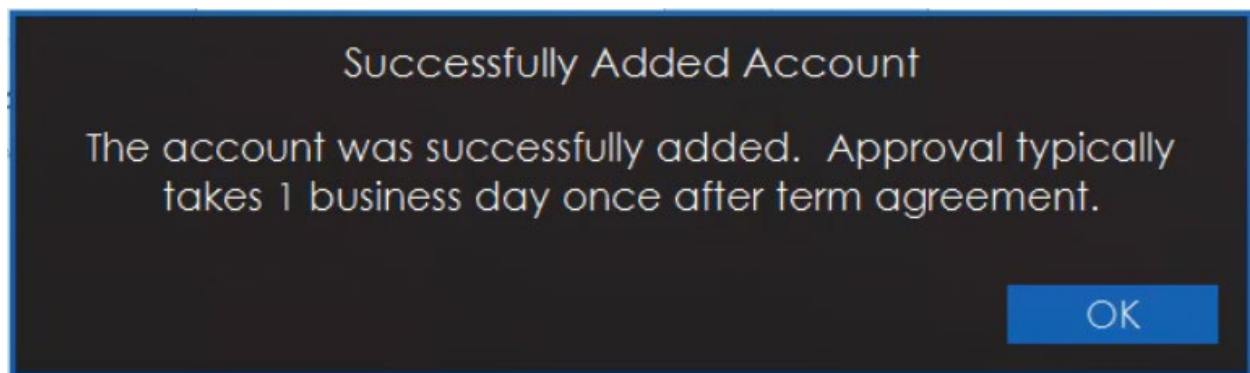
1. Enter the Bank Account Name
2. Enter the Business Information
3. Enter the Bank Account Information
4. Click **Save** to continue

Repeat these steps for each account that you wish to add.

The screenshot shows the 'Add New Merchant Account' form with the following sections and fields:

- Account Identification Information** (Callout 1):
 - * Bank Account Nickname: KBS Bank - All Locations
- Business Entity Information** (Callout 2):
 - * Business Type: Sole Proprietor
 - * Owner First/Last Name: Emily Smith
 - * Date of Birth: 4/15/1965
 - * Legal Name: Simons Funeral Home
 - * Address 1: 543 Perrysville Avenue
 - * Address 2: (empty)
 - * City, State Zip: Pittsburgh PA 15212
 - * Phone: 412-555-1212
 - * Fax: 412-555-1234
 - * SSN: 123-45-6789
- Bank Account Information** (Callout 3):
 - * Bank Name: KBS Bank
 - * Bank Phone: 412-555-3434
 - * Account Type: Checking
 - * Routing Number: 122105155 (Re-enter: 122105155)
 - * Account Number: 987654321 (Re-enter: 987654321)
- Buttons** (Callout 4):
 - *Fields are required
 - SAVE
 - CANCEL

A confirmation will appear to verify each account was added successfully.



All accounts will have a Pending Client Agreement status until the Agreement has been approved. Click the **View and Accept Agreement** to complete the application.

SETTINGS

Preferences Funeral Home Info Funeral Home Defaults Staff Corporation Info **Merchant Accounts** Client Type Settings Bar Code Setup Tasks Profile Settings Resource Setup FamilyLink

+ ACCOUNT REFRESH

Account Nickname	Bank	Account #	Corporation	GL Account	# Branches	Status
KBS Bank - All Locations	KBS Bank	...4321	No Corporation Selected	No Account Selected	0	Pending Client Agreement

2 VIEW AND ACCEPT AGREEMENT

ACCOUNT SUMMARY INFORMATION EDIT

ACCOUNT CORPORATION & BRANCH SUMMARY EDIT

Account Nickname: KBS Bank - All Locations

Corporation: No Corporation Selected

Verify the company account information.

View and Accept Agreement

Business Owner/Officer Information

The individual listed here should be an owner, officer or partner of the business with the ability to accept the Terms and Conditions of the service.

First Name* Emily

Last Name* Smith

Home Address* 6021 Wallace Road

Home Address2

Home City* Wexford

Home State* PENNSYLVANIA

Home Zip* 15090

Birth Date* 04/15/1965

Month/Day/Year Example 12/31/1970

Email* esmith@generalh.com

Authenticate your identity by answering the security questions. These questions may be best answered by the previously submitted owner/account signer.

View and Accept Agreement

Question Based Authentication

Please complete all of the following questions.

Which of the following professional licenses have you ever held?

Select the professional license you have held or 'None of the above' if you do not hold or have not held any of the licenses displayed.

- ☐ Lab And Xray
- ☐ Licensed Practical Nurse
- ☐ Physical Therapist
- ☐ Vehicle Manufacturer
- ☐ None of the above

What color is your 1988 Oldsmobile Cutlass Ciera?

May include vehicles which you recently sold or vehicles for which you co-signed

- ☐ Black
- ☐ Cream
- ☐ Dark Blue
- ☐ Yellow
- ☐ I have never been associated with this vehicle

Which of the following boats or watercrafts have you owned?

Select the watercraft you have been associated with.

- ☐ 14 ft. Smoker Craft Seaking
- ☐ 15 ft. Lowe 1648
- ☐ 18 ft. Lowe Industries 1975
- ☐ 19 ft. Stratos Strato
- ☐ None of the above

[Continue](#)

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Accept and agree to Vantage's Merchant Service Agreement. Approval may take 24-36 hours.

View and Accept Agreement

Microsoft Word - Vantage SUB-MERCHANT ... 1 / 28

Last Updated August 27, 2018

SUB-MERCHANT AGREEMENT

This Sub-Merchant Agreement ("Agreement") is a legal agreement between Vantage Card Services, Inc. ("Vantage"), and the business entity ("Merchant") set forth on the Merchant Application form ("Merchant Application"). This Agreement governs Merchant's use of Vantage's payment processing services ("Services") and must be agreed to in order to use the Services.

1. PAYMENT CARD SERVICES.

1.1 DESCRIPTION.

The Services allow Merchant to accept payment from its customers using credit and debit cards or other payment devices or credentials (collectively "Card(s)") validly issued by Visa U.S.A. Inc. ("Visa"), MasterCard International Incorporated ("MasterCard"), and DFB Services LLC ("Discover"). If Merchant elects and is approved, the Services may also allow Merchant to accept payment from its customers using Cards validly issued by American Express Travel Related Services Company, Inc. ("American Express") as further set forth in this Agreement. Visa, MasterCard, Discover, and American Express are collectively the "Card Brand(s)". Merchant must only use the Services for the business purpose described in Merchant's Application and not for personal, family, or household use. Upon Vantage's approval of Merchant's Merchant Application and this Agreement, which shall be as of the date Vantage issues a merchant identification number to Merchant through which Merchant may submit Card transactions to Vantage for processing ("Effective Date"), Vantage grants Merchant use of the Services subject to and in accordance with the terms set forth in this Agreement. Merchant will be deemed to have accepted this Agreement and will thereby be bound by this Agreement upon the occurrence of either (i) the Effective Date; the date of Merchant's (or Merchant's representative's or agent's) electronic acceptance Agreement, as set forth in Section 12.6; or the date of Merchant's submission of any transaction to Vantage for processing.

1.2 CARD ACCEPTANCE.

When accepting Cards, Merchant will follow all procedures and rules set forth in the Policies and Rules. Merchant is responsible for identifying the person in whose name a Card is issued ("Cardholder"), such identification to be completed only in accordance with the Rules (defined below), and upon submission of a transaction for authorization Merchant warrants the identity of the customer as the Cardholder. Except as set forth in this Agreement, Merchant will honor, without discrimination, any valid Card properly tendered by a Cardholder for bona fide transactions for the purchase of goods or services from Merchant. Merchant may, in accordance with the applicable limited acceptance Rules, elect not to accept Visa and/or MasterCard branded credit or debit cards, but must provide Vantage with prior written notice of such election. If Merchant elects not to accept certain Cards as set forth in the previous sentence, Merchant will be solely responsible for ensuring it only accepts those Cards which meet its acceptance election and Vantage, upon processing any transaction (and Merchant will be responsible for and pay all fees associated with such transaction) submitted to Vantage, Merchant will properly disclose to the Cardholder at the time of the Card transaction, the Merchant's name, return policy, refund policy, and other limitations Merchant may have on accepting returned merchandise. Merchant's refund policies for purchases made with a Card must be at least as favorable as its refund policy for purchases made with any other form of payment. Merchant will identify the Cardholder when accepting payment and will request the Card expiration date and ZIP code or postal code from the Cardholder's

By clicking **I Agree** below you acknowledge that you have read, understand, and agree to be bound by the terms above. Click **I Do Not Agree**, if you do not agree with the terms above.

[I Agree](#) [I Do Not Agree](#)

Finally, assign the E-Pay merchant accounts to a corporation. Select the account in the top box, then click on the **Edit** button in the Account Corporation & Branch Summary section.

The screenshot shows the 'SETTINGS' page with the 'Merchant Accounts' tab selected. Below the navigation bar, there is a table of accounts. The first row is highlighted in blue:

Account Nickname	Bank	Account #	Corporation	GL Account	# Branches	Status
KBS Bank - All Locations	KBS Bank	...4321	No Corporation Selected	No Account Selected	0	Pending Client Agreement

Below the table is a 'VIEW AND ACCEPT AGREEMENT' button. At the bottom, there are two sections: 'ACCOUNT SUMMARY INFORMATION' and 'ACCOUNT CORPORATION & BRANCH SUMMARY'. The 'EDIT' button in the 'ACCOUNT CORPORATION & BRANCH SUMMARY' section is highlighted with a red box.

Choose the corporation that will use the selected E-Pay merchant account, along with the GL account for those payments to go into. Check each branch that will be associated with the account. Click **Save**.

The screenshot shows the 'ACCOUNT CORPORATION & BRANCH SUMMARY' dialog box. It contains the following fields and options:

- Corporation:** A dropdown menu with 'Simons Funeral Home' selected.
- GL Account:** A dropdown menu with 'Checking (101010)' selected.
- Branches Assigned:** A section titled 'Funeral Homes' containing a list of branches with checkboxes:
 - ☒ Simons
 - ☒ Thompson
 - ☐ Linbrook
 - ☐ Graham
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom right.

Your E-Pay enrollment is now complete, and your merchant account status will update once approved.

Add even more convenience by enrolling in the E-Pay Insurance Assignment!

For 2-minute Insurance Assignments, click on the Client Tab, Insurance Assignment, and click the **Enroll E-Pay Insurance** button!

The screenshot shows a web application interface for "CLIENT INSURANCE ASSIGNMENT". The left sidebar contains a navigation menu with the following items: RECORD, SUMMARY, TASKS, BARCODE, FAMILYLINK, CLIENT (highlighted with a red box), VITALS, FAMILY / FRIENDS, CONTRIBUTIONS / ACTIVITIES, CEMETERY / CREMATORY, CAUSE OF DEATH, PLACE OF DEATH, OTHER DEATH INFORMATION, DEATH CERT. TRACKER, VETERAN, MONUMENT, EMBALMING, SHIPPING, INSURANCE ASSIGNMENT (highlighted with a red box), CUSTOM DATA, SERVICES, and BILLING. The main content area is titled "CLIENT INSURANCE ASSIGNMENT" and includes a search bar at the top right. Below the title, there is a section for "Insurance Policies" with a table containing columns for "INSURANCE COMPANY", "POLICY NUMBER", and "STATUS". To the right of this table is a red box containing the "E-PAY" logo and the text "Enroll E-Pay Insurance", with four red arrows pointing to it from the top and bottom. Below the "Insurance Policies" section is the "Insurance Details" section, which includes radio buttons for "E-Pay Policy" (selected), "In-House Policy", "Individual Life Policy" (selected), and "Group Life Policy". It also features input fields for "Insurance Company", "Policy Number", "Policy Amount", "Invoice(s) Total Due" (\$0.00), "Request Amount" (\$0.00), "Assigned Amount" (\$0.00), and "Processing Fee Pay By" (Family selected). To the right of these fields are dropdown menus for "Funeral Directors", "Primary Contact", and "Merchant Account" (set to "DEMO - USB Bank"). Below these are buttons for "Beneficiaries" (Family, Funeral Home, Delete). At the bottom right, there is a table with columns for "NAME", "RELATION", "SSN", "TAX ID", and "EMAIL", and a "Note" section with a text area.