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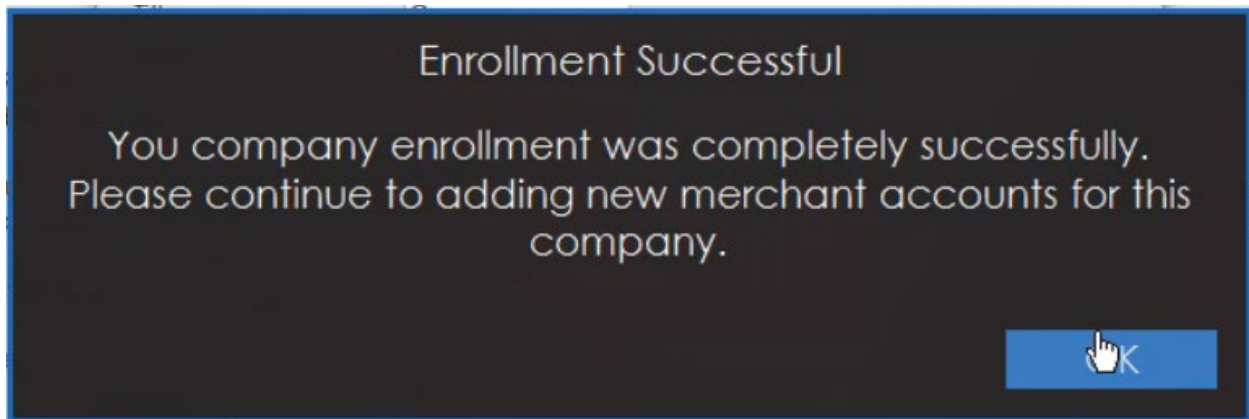
To enroll, click on Settings, the Merchant Account tab, then the Begin Enrollment button.

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.

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.

Complete this section with the company's legal name, address, and EIN (if applicable).]
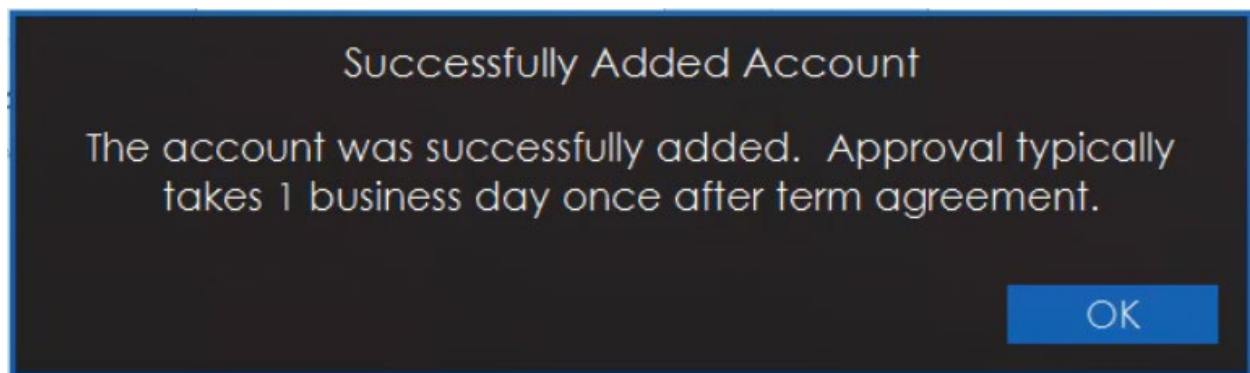
1. Enter the Bank Account Name
2. Enter the Business Information
3. Enter the Bank Account Information
4. Click **Save** to continue

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

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.

Verify the company account information.

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

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

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.

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**.

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!