



HARBORTOUCH®

# ECHO POS SETUP FORM



Please submit this form along with the Merchant Application and all supporting documentation by email to [apps@harbortouch.com](mailto:apps@harbortouch.com) or via fax to 908-730-7437

OFFICE ID:
SALES REP NAME:
<input type="checkbox"/> M.S.B. AMOUNT: \$ _____
<input type="checkbox"/> NEXT DAY FUNDING (SUBJECT TO UNDERWRITING APPROVAL) TO RECEIVE NEXT DAY DEPOSITS, THE TERMINAL MUST BE SET TO BATCH BEFORE 7:45 PM EST. PLEASE NOTE IF YOU WOULD LIKE TO REQUEST A SPECIFIC BATCH TIME:
FOR INTERNAL USE ONLY MID:

<input type="checkbox"/> NEW ACCOUNT
<input type="checkbox"/> EXISTING ACCOUNT EXISTING MID: _____
<input type="checkbox"/> OWNERSHIP CHANGE OLD MID: _____ REPROGRAMMING FEE OF \$400 WILL BE CHARGED IF APPLICABLE

<b>MERCHANT INFORMATION</b>
NAME OF BUSINESS (DOING BUSINESS AS):

<b>CONTACT INFORMATION</b>	
The primary and secondary contacts will be consulted for the online presentation of the menu design. Please make sure these contacts are decision makers such as business owner or partner.	
<b>PRIMARY CONTACT</b>	<b>SECONDARY CONTACT</b>
CONTACT NAME:	CONTACT NAME:
POSITION WITH COMPANY:	POSITION WITH COMPANY:
TELEPHONE #:	TELEPHONE #:
CELL PHONE #:	CELL PHONE #:
E-MAIL ADDRESS:	E-MAIL ADDRESS:
ALTERNATE PHONE NUMBER OR ALTERNATE E-MAIL ADDRESS:	ALTERNATE PHONE NUMBER OR ALTERNATE E-MAIL ADDRESS:

<b>ADDITIONAL PHONE NUMBERS</b>	
Please provide all phone numbers you would like associated with your account in addition to those listed in the Contact Information section above. Our phone system will recognize your account when calling from one of these numbers. This enables us to service your account more quickly. Please include any owner/manager cell phone numbers in addition to the business phone.	
PHONE NUMBER:	NAME/DESCRIPTION:

Please supply the following information about your business so that we can accurately set up your Echo POS system and ensure that it meets all of your needs.

**1. HOW ARE YOU CURRENTLY HANDLING TRANSACTIONS?**

- Pen and paper
- Cash register
- POS system
- Other: \_\_\_\_\_
- N/A - new business

**2. WILL THIS BE YOUR FIRST HARBORTOUCH SYSTEM?**

- If NO:
- MID of existing location: \_\_\_\_\_
  - Will you be using the same prices and menu items?  Yes  No

YES  NO

**3. WILL YOU BE PROGRAMMING YOUR ITEMS OR MENU INTO THE ECHO POS SYSTEM, OR WILL YOU REQUIRE HARBORTOUCH TO PROGRAM THE SYSTEM?**  HARBORTOUCH  MERCHANT

**4. ARE YOU CURRENTLY OPEN FOR BUSINESS?**

- If NO:
- What is your projected opening date? \_\_\_\_\_
  - Is the building construction complete?  Yes  No If no, ETA: \_\_\_\_\_
  - Are countertops installed?  Yes  No If no, ETA: \_\_\_\_\_
  - Do you have all required permits and licenses?  Yes  No If no, ETA: \_\_\_\_\_

YES  NO

If you answered no to any of the above questions, we will be unable to complete the shipment and installation of your system. You may e-mail the team assigned to your account when your business is ready for installation.

**5. WHAT DATE DO YOU PLAN ON INSTALLING THE SYSTEM?**

Date: \_\_\_\_\_

**6. WILL A SPANISH SPEAKING REPRESENTATIVE BE REQUIRED?**

YES  NO

**7. BUSINESS MODEL INFORMATION**

■ Describe your business model (i.e., restaurant, bar, pizza delivery, clothing store, convenience store, etc.)  
\_\_\_\_\_

■ Indicate the percentage of each transaction type that is handled in your business (if retail, enter 100% counter service):

Counter service: \_\_\_\_\_ %

Dine-in: \_\_\_\_\_ %

Call-in/pick-up: \_\_\_\_\_ %

Delivery: \_\_\_\_\_ %

Bar: \_\_\_\_\_ %

Catering: \_\_\_\_\_ %

■ Number of full-service tables (if retail, enter zero): \_\_\_\_\_

■ How many of each type of staff do you have per shift?

Cashiers: \_\_\_\_\_

Servers: \_\_\_\_\_

Bartenders: \_\_\_\_\_

Drivers: \_\_\_\_\_

Hosts: \_\_\_\_\_

■ Do you need the ability to hold credit card information to be recalled for payment later (i.e. bar tabs)?  Yes  No

■ How many total retail items do you sell? \_\_\_\_\_

■ Are you using manufacturer barcodes or printing your own?

The Echo system cannot print barcodes.

Manufacturer  Custom

■ Will you require a barcode scanner?

In addition to scanning retail items, a barcode scanner can be used for scanning membership cards.

Yes  No

■ Do you require age verification?  Yes  No

■ Do you need the system to generate purchase orders (Retail only)?  Yes  No

**8. WILL YOU BE USING HARBORTOUCH-SUPPLIED GIFT CARDS?**

YES  NO

If YES, continue to next question

If you intend on using a third-party gift card provider, we will require the following?

■ Gift card conversion form (available from your sales representative or by emailing giftcards@harbortouch.com)

■ A physical card so we can test compatibility.

Please send your sample card and conversion form to Harbortouch, Attn: Gift Cards, 2202 N. Irving St., Allentown, PA 18109. E-mail giftcards@harbortouch.com with questions

**9. DO YOU CURRENTLY HAVE HIGH-SPEED INTERNET ACCESS?**

YES  NO

Satellite and dial-up are not approved Internet types for the Harbortouch POS system. If you will be using a wireless Internet option (3G/4G) you must provide 3 speed tests to verify that it meets required connection speeds and sign a wireless waiver (provided by your factory team).

■ If YES, what type of connection?  DSL  Cable  Fiber Optic  3G/4G

• Who is your Internet Service Provider (ISP) (i.e., Verizon, Comcast)? \_\_\_\_\_

■ If NO, when will you have Internet installed? \_\_\_\_\_

ETA: \_\_\_\_\_

■ Are you part of a larger network (mall, university, etc.)?  Yes  No

■ Do you have additional devices on the network such as security cameras or a jukebox?  Yes  No

**10. CABLE REQUIREMENTS**

Each networked device (POS systems or remote printer) will require a CAT 5 Ethernet cable run from the router to each piece of equipment. An existing Ethernet jack within 10 feet of the equipment is also acceptable as Harbortouch will supply a 10' patch cable.

Please select the appropriate option below in regards to your CAT 5 cabling:

CAT 5 cabling is already installed

CAT 5 cabling will be installed by merchant ETA: \_\_\_\_\_

Harbortouch to install CAT 5 cable runs (Installation is not included for Harbortouch Echo, but is available as an optional service on the Service Agreement. \$249 one-time fee applies to any advanced cable runs and is in addition to the basic installation charge listed on the Service Agreement.)

• Number of cable runs required: \_\_\_\_\_

**11. SPECIAL INSTRUCTIONS (MAY REQUIRE APPROVAL):** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**X SIGNATURE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **PRINT NAME:** \_\_\_\_\_