POSP Online Ordering Forte Setup

- 1) Go to https://admin.pointofsuccess.com/ Find Restaurant By Name > Enter % for all locations.
- 2) Go to the merchants folder in Sync > Look for the POS Online Ordering Signed Contract
- 3) Log into Merchant Foundry (MF) and go the merchant > Setup Information



4) Look for the Routing Number, DDA Number and IRS Name

IRS Name	Routing Number
	DDA Number

- 5) Open Forte > <u>https://vt.paymentsgateway.net/</u>
- 6) Click Add for a new merchant and fill out the information Take the information from MF

Merchant: POSLEADER.COM	Status: Active
First Name: Bob	Last Name: Bruso
mpany Name: RJ Bruso Inc	
Address: 6745 W Ken Caryl Ave	Address 2:
Postal Code: 80128	
City: Littleton	State: CO 🛊
hone Number: 720-981-7078	Fax Number:
Email Address: bob@robertsdeli.com	Consumer ID: Roberts #1
Client ID: 10704701	

- 7) Make sure to add a Customer ID of the name of the merchant
- 8) Once the merchant is added set up a eCheck Take this information from MF



 Add the first 'New Transaction" > Set the Entry Class Code to PPD > Select Frequency 'One Time' > Select the start date as July 1, 2020 for the amount needed.



- 10) Start the deferred payment on July 1 for the total of the deferred payment.
- 11) Add the Second 'New Transaction" > Set the Entry Class Code to PPD > Select Frequency 'Monthly' > Select the start date as July 1, 2020 for \$149.00.
- 12) Make sure to check the box for "Continuous"

\ <u>_</u>	Select
	One Time Future
5	Weekly
	Bi-Weekly
>	Monthly