

# Merchant Set-Up Form

**Sales Rep Info**

Sales Rep Name:	Sales Rep Website:
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**Merchant Information**

Legal Name of Merchant:		
DBA Name or Trade Name:		
Company Name:	Number of Locations:	
Address:		
City:	State:	Zip:
Phone:	Phone EXT:	Fax:
Website:		

**Program Pricing/Monthly****Contact Information**

Primary Contact:	Phone:	Email:
Secondary Contact:	Phone:	Email:

**Cards/Starter Kit Pricing****Equipment**

<input type="checkbox"/> Standalone	<input type="checkbox"/> Integrate with Credit Card	Dial 9:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Terminal / Credit Card Type: / Processors:			Number of Terminals/Tablets:	
<input type="checkbox"/> Gift Only	<input type="checkbox"/> Gift & Loyalty			

**Loyalty Program Options\*** - Choose the program description that best describes what you want to offer to cardholders.

<input type="checkbox"/> <b>Points for Prize</b> <small>A card holder can accumulate points based on dollars spent. Once they reach a certain level they are eligible to redeem those points.</small>	<input type="checkbox"/> \$ 1 spent = 1 points <input type="checkbox"/> \$ 1 spent = 10 points <input type="checkbox"/> \$ [ ] spent = [ ] points	<input type="checkbox"/> <b>Threshold</b> <small>A card holder is rewarded when they reach a certain level. The threshold, reward and point to dollar ratio varies per merchant.</small> <b>To earn points:</b> <input type="checkbox"/> \$ 1 spent = 1 points <input type="checkbox"/> \$ 1 spent = 10 points <input type="checkbox"/> \$ [ ] spent = [ ] points
<input type="checkbox"/> <b>Percentage Cash Back</b> <small>A cardholder is given a percentage of their purchases as a cash back reward onto their card. The merchant determines the percentage.</small>	<input type="checkbox"/> 1% cash back <input type="checkbox"/> 2% cash back <input type="checkbox"/> [ ] % cash back	<b>To earn a reward:</b> <input type="checkbox"/> 100 points = [ ] reward <input type="checkbox"/> 250 points = [ ] reward <input type="checkbox"/> [ ] points = [ ] reward
<input type="checkbox"/> <b>Punch Card</b> <small>A card holder is given a "punch" or credit for each qualifying purchase. When they reach a certain level the cardholder receives a free item. The merchant determines the item and level.</small>	<input type="checkbox"/> Buy 10 get 1 free <input type="checkbox"/> Buy 5 get 1 free <input type="checkbox"/> Buy [ ] get [ ] free	

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Pursuant to the Merchant Agreement for Transaction Services it is necessary for Merchant to provide Factor4 with its banking information to facilitate billing and payments. It is the Merchant's obligation to inform Factor4 of any changes to its banking details and accounts. Factor4 will not be liable for any funds incorrectly transferred as a result of a change in banking information or errors that directly resulted from information provided by Merchant.

Merchant authorizes Factor4 to debit from the Merchant's bank account all monthly payments and other amounts owed to Factor4 related to the Transaction Services. This authorization shall remain in effect after termination of the Agreement and for as long as Merchant owes any amounts to Factor4. Merchant agrees that Factor4 will not be liable for any loss or damage incurred as a result of anything done or not done pursuant to this authorization. If the account is transferred to another branch or the account is closed and an account is opened at another bank this authorization shall have the same force and affect as if it originally was directed to that branch or bank.

## Electronic Funds Transfer Information

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Bank Name:

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Branch:

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City:

State:

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9-Digit Bank Routing Number:

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Account Number:

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The undersigned Guarantors acknowledge and agree to be bound by all the terms and conditions of this Agreement and unconditionally guarantee the performance of this Agreement. By signing below, Merchant (I) represents that the information provided by Merchant in this Agreement is true, complete and not misleading; (II) acknowledges that Merchant has read and understands this Agreement and Operating Procedures and agrees to be bound by their terms; and (III) authorizes Gift Loyalty Services and its agents to credit and debit the Designated Automatic Funds Transfer Account in accordance with this Agreement.

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Principal (Signature Required)

Title

Print Name

Date

**For full Factor4 Merchant Agreement visit: [www.factor4gift.com/merchant-agreement](http://www.factor4gift.com/merchant-agreement).  
Attach voided check from bank account.**