



MerchantE Partner to Portal API Specification

February 2024



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Table of Contents

- Introduction..... 1**
 - Documentation..... 1
 - Versioning..... 1
- Getting Started..... 6**
- Certification..... 8**
- Authentication 9**
 - Request Parameters 9
- Merchant Application Fields..... 10**
- Response Field Definitions..... 11**
- Example Request and Response 12**
 - Create Request..... 12
 - Create Response 17
 - Update Request..... 18
 - Update Response 24
 - Attachment Submission 25
- GET Created Records..... 26**
 - GET Opportunity 26
 - GET Account..... 26
 - GET Contacts..... 26
 - GET Business Checking Accounts 26
 - GET Quotes 26
 - GET Quote Line Items..... 26
- Business and Owner Descriptions 27**
- Request Field Data 29**
 - Merchant Information 29



Additional Information 38

Beneficial Owners 39

Transaction Payment Options 40

Solutions 44

Fees 51

Equipment..... 65

Backend..... 66

API Validation Rules..... 69

Introduction

The MerchantE **Partner to Portal API** offers a streamlined process to pass merchant business information related to a sales opportunity, a partial application, or a completed application to MerchantE. This API model is based on the MerchantE application and the business information required to underwrite and onboard merchants with our company.

Clients of this API are granted the ability to create, update, or delete Salesforce objects containing business information specific to an opportunity, directly from their own customer relationship management system. These objects are then transposed to the Partner Portal in a viewable format, where they will display data needed to onboard the account so that the merchant may begin to process credit card transactions.

The merchant application and onboarding process is available not only through the Partner to Portal API, but also through manual data entry into the custom Partner Portal user interface. Additionally, the Partner Portal can be utilized to append information sent through the API, or as a quality assurance checkpoint prior to submitting the application to underwriting.

The purpose of this document is to provide our partners with an informative reference to be utilized while successfully integrating with the Partner to Portal API offered by MerchantE. This API was designed to automate data entry in the Partner Portal user interface, enabling our partners' businesses to employ an automated approach to managing application and deal submission, and data propagation required for underwriting and onboarding merchants with MerchantE.

Documentation

MerchantE technical documentation and SDK libraries are available at: <https://developer.merchante.com>.

The **PCI Security Standards Council** manages the rules that merchants must follow when using payment cards. Those rules are available at: <https://www.pcisecuritystandards.org/>.

The **North American Industry Classification System (NAICS)** is used by the United States, Canada, and Mexico to classify businesses by industry. Each business is classified into a six-digit NAICS code number based on the majority of activity at the business. The United States Census Bureau NAICS lookup can be found here: <https://www.census.gov/econ/isp/>.

Versioning

Date	Version	Change Description
April 2023		<ul style="list-style-type: none">Switched to Monthly updates.Updated specification template.
March 2023		<ul style="list-style-type: none">Updated Attachment Size
January 2023	3.5	<ul style="list-style-type: none">Removed WebCommerce, EmployeePlus, and Pre-Imbursements.
December 2022	3.4	<ul style="list-style-type: none">Removed UnionPay references.
July 2022	3.3	<ul style="list-style-type: none">Consolidated API Required and UW Required to Required.

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		<ul style="list-style-type: none"> • Marked the following fields as required: • Yearly_Net_Revenue__c • State_of_Entity_Formation_Incorporation__c • Chain_Non_Chain__c • Sponsorship__c • Customer_Service_Phone__c • Location_Type__c • App_Email__c • Years_at_Location__c • Title • Bank_Name__c • Bank_Street_Address__c • Bank_City__c • Bank_State__c • Bank_Zipcode__c • Years_Open__c • Checking_Account_Unique_Field__c • MeS_Payment_Gateway__c • URL_Address__c • Name_of_Certified_Shopping_Cart__c • Payment_Gateway_Administrator_Email__c • Processing_Option__c • MCC_API_Field__c • Visa_MC_Discover_Volume__c • BET_Table_ID_API_Field__c • Merchant_Application_Notes__c • Removed the following field references: • MCC__c • BillingCountry • BET_Table__c • Updated the Contact_Role parameter values. • Removed –cert from the GET methods.
June 2022	3.2	<ul style="list-style-type: none"> • In the Authentication section, added Request Parameters table and note about Auth token. • In Merchant Application Fields section, removed mention of Partner Portal UI. • In Update request section, added note about “id” field. • Added GET Created Records section.
August 2021	3.1	<ul style="list-style-type: none"> • In the Merchant Application Fields section, added Response Field Definitions. • In the Example Request and Response section, updated all Salesforce Field API Names in the JSON structure to correctly match API formatting (“ c” to “__c”). • Updated all Request Field Data entries to current availability within the Merchant Application. • In the Merchant information section, added a table with all Billing/Shipping State and Country codes.

		<ul style="list-style-type: none"> • In the Additional information section, added the following Salesforce API fields: <ul style="list-style-type: none"> • Partner_Branch__c • Association_ID__c • Account_Type__c • In the Transaction payment options section, added the following Salesforce API fields: <ul style="list-style-type: none"> • UnionPay_SecurePlus__c • UnionPay_SecurePlus_Volume__c • In the Solutions section, added Salesforce API fields for the following solutions: <ul style="list-style-type: none"> • MerchantE Invoice • MerchantE Invoice Link • Hosted Payments • Interchange Optimization • WebCommerce • MeS Financial Services • Money OUT • EmployeePlus Payouts • Pre-Imbursements • In the Fees section, added Salesforce API fields for the following fees: <ul style="list-style-type: none"> • UnionPay SecurePlus • Payment Gateway • Business Hub • Hosted Payments • WebCommerce • MerchantE Invoice • MerchantE Invoice Link • Other Monthly Fees • Added a Backend section, defining any API fields that are used in the sample JSON structure, but are not visible within the Salesforce UI. • In the API validation rules section, updated available validations and error messages. • Removed all instances of <i>Amex Tiered Plan</i> as it is no longer valid. <p>Removed all instances of the <i>Business Essentials</i> solution as it is no longer valid.</p>
June 2021	3.0	<ul style="list-style-type: none"> • Rebranded document • In the Example Request and Response section, added the following lines to the Create Request JSON structure: <ul style="list-style-type: none"> • "Auto_Submission_to_Underwriting__c": true, • "StageName": "Pending Underwriting", • "RecordTypeId": "0123400000M77hAAC", • "Need_Pricing_Exception_Approval__c": false, • "Account_Type__c": "Conversion Merchant", • "Name": "Testing Stage",

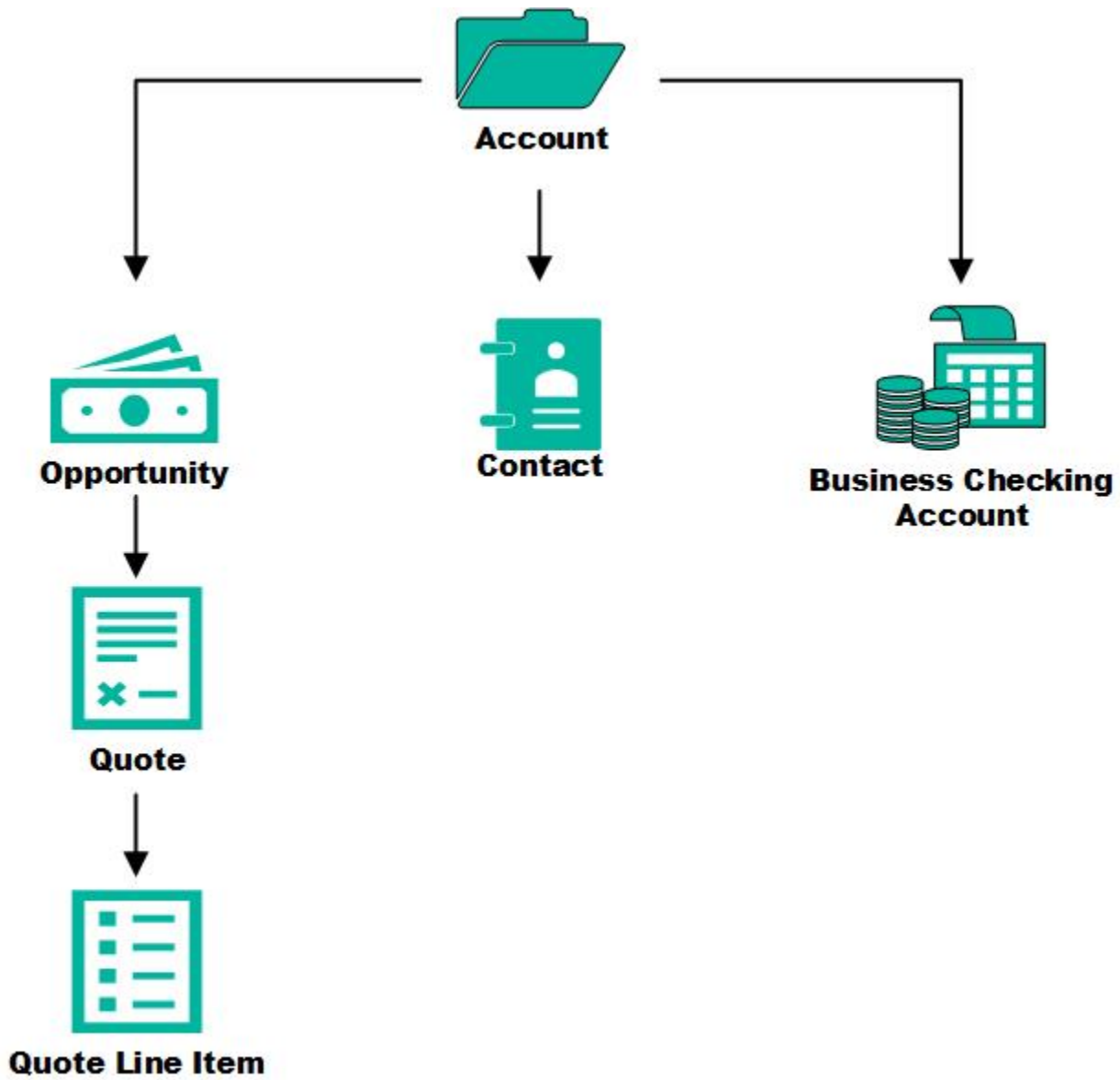
		<ul style="list-style-type: none"> • “MerchantE_Invoice__c”: true, • In the Example Request and Response section added the following line to the Update Request JSON structure: <ul style="list-style-type: none"> • “MerchantE_Invoice__c”: true, • In the Merchant information section, added the following Salesforce API fields: <ul style="list-style-type: none"> • Merchant_Category__c • Is_High_Risk__c • In the Solutions section, added the following Salesforce API field: <ul style="list-style-type: none"> • MerchantE_Invoice__c • In the Fees section, added the following Salesforce API field: <ul style="list-style-type: none"> • Pin_Debit_Pass_Through_Rate__c • In the API Validation Rules section, added the following errors: <ul style="list-style-type: none"> • “LegalName is required” • “Sponsorship is required” • “Account Type is required” • “Contact Role is required” • “RecordTypeId is required as Direct Merchant”
February 2020	2.0	<ul style="list-style-type: none"> • Rebranded document • Separated request field data by application sections: <ul style="list-style-type: none"> • Merchant information • Additional information • Beneficial owners • Transaction payment options • Solutions • Fees • Equipment • Changed the Salesforce data type for “State of Formation/Incorporation” to a picklist. • In the Merchant information section, added the following Salesforce API fields: <ul style="list-style-type: none"> • Master_Merchant_Agreement_Execution_Date__c • Primary_MID__c • In the Additional information section, added the following Salesforce API field: <ul style="list-style-type: none"> • Change_Notes__c • In the Solutions section, added the following Salesforce API fields: <ul style="list-style-type: none"> • MeS_Activation_Training_for_Merchant__c • Product_Training__c • Business_Platform_Training__c • Level_3_Training__c • Additional_Info_Training__c • Authorization_Host__c

		<ul style="list-style-type: none"> • Authorization_Host_other__c • Customer_Rate_not_to_exceed_3_50__c • Surcharge__c • Surcharge_Fee__c • Added the Fields required by the API section. • Added the Fields required for underwriting.
July 2018	1.6	<ul style="list-style-type: none"> • Added Merchant Notes to sample requests.
June 2018	1.5	<ul style="list-style-type: none"> • Adjustment to “Required for UW” column for primary contact.
May 2018	1.4	<ul style="list-style-type: none"> • Revision to validation rules, additional information in the ‘Getting Started’ section
April 2018	1.3	<ul style="list-style-type: none"> • Revision to field list, requests and responses, to include partial ACH values, DDA type, billing and shipping address changes.
March 2018	1.1	<ul style="list-style-type: none"> • Revision to fields list, requests and responses
March 2018	1.2	<ul style="list-style-type: none"> • Revision to field list to identify fields required for underwriting, added entity type, owner details and validation list
February 2018	1.0	<ul style="list-style-type: none"> • Initial draft of the API technical specification

Getting Started

To get started using the MerchantE Partner to Portal API, you must first contact the MerchantE Partner Support team and request access. Once the use case is discussed and approved, you may receive additional documentation and consultation prior to implementing this tool. The design of the API allows it to be implemented for many use cases. For suggestions on how best to address your business needs, please contact the Partner Support team. When beginning the integration process, it's important to first understand the structure of the data objects. The hierarchy of objects is described below. The fields contained in these objects are described in the **Request Field Data** tables.

- Account (Parent)
- Opportunity (Child to Account)
- Contact (Child to Account)
- Business Checking Account (Child to Account)
- Quote (Grandchild to Account and Child to Opportunity)
- Quote Line Item (Greatgrandchild to Account and Grandchild to Opportunity)



Certification

Prior to utilizing the Partner to Portal API in production, a certification process must be completed. A member of the certification team will be assigned to work with each partner as the integration interest is identified. The primary goal of certification is to validate that the Partner API request is accurately formed and successfully transmitted to MerchantE prior to submitting production data for live merchants. The certification endpoint will be shared after approval to utilize the tool. The production endpoint will be shared after completing the certification process.

Authentication

For a request to be successfully received by MerchantE, it must adhere to the following basic authentication process:

1. "Get Auth Token" Request Method containing the provisioned Salesforce username and password is sent via the URL to generate an access token.
Note: Auth token is valid for 24 hours.
2. The access token must be passed as Type: "OATH 2.0" with the authorization header in the create/update POST requests to the production endpoint.

Request Parameters

Parameter	Value	Notes
grant_type	password	Literal "password" text
client_id	*To be provided by SE*	Different for each sandbox/org
client_secret	*To be provided by SE*	Different for each sandbox/org
username	partnerportalapi@merchante.com.cert	Different for each sandbox/org
password	{{Password+Security_Token}}	Provided by secure Email, Security Token is not always required depending on the org configuration

Merchant Application Fields

The Partner to Portal API can accept both partial and complete applications. Partial applications can be submitted when a limited amount of information about the business is available and will be updated later through the API. Completed applications containing all the required information are needed for underwriting. The merchant application is broken up into the following sections:

- Merchant Information
- Additional Information
- Beneficial Owners
- Transaction Payment Options
- Solutions
- Fees
- Equipment

API requests can be made in JSON or XML format. The fields are listed in the [Request Field Descriptions](#). Please note that attachment submissions must be transmitted to an alternate endpoint.

Note:

The Merchant DBA Name is always required.

DDA Type is required when submitting checking account information.

Entity Type, Last Name and Contact Role are required when submitting contact information.

Product Name is required when submitting equipment information.

For the initial request, it's important to use the sample requests, field lists, and validation rules provided. The following specific guidance should be followed when sending a request:

- All required fields are provided.
- At least one Primary Contact/Beneficial Owner is identified.
- Fields required for the Contact/Beneficial Owner is based on the Legal Entity Type/Ownership for the Account.
 - See the Business Entity Type and Ownership Role field definitions for clarification.
 - A Beneficial Owner can have multiple contact roles assigned in a single request.
- Include the Opportunity SFID for Update requests.
 - Source ID can be used to relate SFID to the corresponding fields provided.
- Product Name is required when sending Equipment Information under Quote Line Items.
- To prevent changes to approved merchant applications, updates to applications in the "Pending Underwriting" or "Closed Won" stages are not allowed.

The Product Support team will contact the Primary Contact if additional information is required.

Response Field Definitions

These fields are shown in both the *create* and *update* responses.

- **SFid** - Returns a unique Salesforce ID value for each of the created/updated Salesforce records (Opportunity, Account, Quote, Quote Line Items, Contact).
- **SourceId** - Indicates whether a specific data object has multiple fields (e.g., QuoteLineItem: Equipment). One field will return “null”. Two or more fields will return the following values established in the create/update request:
 - For *Contact*, it returns the value of `Beneficial_Owner_Unique_Field__c`.
 - For *Business Checking Account*, it returns the value of `Checking_Account_Unique_Field__c`.
 - For *Quote Line Item*, it returns the value of `Equipment_Unique_Field__c`.
- **Success** - Indicates if the data element was created successfully (e.g., true; false).
- **ObjectType** - The type of data object being sent and received through the API (e.g., Account, Opportunity, Contact, Business Checking Account, Quote, Quote Line Item).
- **Message** - A string of text that indicates if a specific data object was created/updated successfully. (e.g., “Business Checking Account Created Successfully.”).

Example Request and Response

Utilizing the list of fields mentioned above, a request can be generated to transmit business data to the Partner Portal. Below are the sample requests and the expected responses to display the correct structure for the API requests. Attachments can be sent through the attachment endpoint utilizing the sample request below. Attachments must be less than 2 GB in size, converted to Base64, and include the Opportunity ID in the request.

Create Request

The following JSON structure should be utilized for an initial create request: **Create Request JSON**

```
{
  "opp":{
    "attributes":{
      "type":"Opportunity"
    },
    "Auto_Submission_to_Underwriting__c": true,
    "StageName": "Pending Underwriting",
    "RecordTypeId": "01234000000M77hAAC",
    "Need_Pricing_Exception_Approval__c": false,
    "Account_Type__c": "Conversion Merchant",
    "Name": "Testing Stage",
    "BET_Table_ID_API_Field__c":"2222",
    "Yearly_Net_Revenue__c":null,
    "Yearly_Card_Volume__c":100,
    "High_Monthly_Volume__c":200,
    "Avg_Ticket__c":300,
    "High_Ticket__c":400,
    "Visa_MC_Discover_Volume__c":500,
    "American_Express_Volume__c":600,
    "Seasonal_Months__c":"Jan;Feb",
    "Customer_Type_B2B_Sales__c":null,
    "Customer_Type_B2C_Sales__c":100,
    "Refund_Policy__c":"Exchanges Only",
    "Days_to_Ship_Deliver__c":"1 to 7",
    "Advanced_Payments__c":45,
    "Visa_MasterCard__c":true,
    "Discover_MeS_Settlement__c":true,
    "Discover_Settlement_Existing_Merchant__c":true,
    "American_Express_MeS_Settlement__c":true,
    "Amex_Settlement_Existing_SE__c":"test Amex",
    "Debit_with_Pin__c":true,
    "ACH__c":"true",
    "EBT__c":"true",
    "FCS__c":"test fcs",
    "Check_Authorization__c":"true",
    "Name_of_Provider__c":"test Name of provider",
    "Merchant__c":"test merchant",
    "Check_pct__c":55,
    "Card_Network_Volume_Internet_CNP__c":20,
    "Card_Network_Volume_Manually_K_M__c":20,
    "Card_Network_Volume_MO_TO_CNP__c":20,
    "Card_Network_Volume_Swiped_CP__c":40,
    "ACH_Debit_Avg_Dollar_Per_Tx__c":100,
    "ACH_Credit_Avg_Dollar_Per_Tx__c":200,
    "ACH_Debit_Max_Dollar_Per_Tx__c":300,
    "ACH_Credit_Max_Dollar_Per_Tx__c":400,
    "ACH_Debit_Max_Dollar_Per_Day__c":500,
    "ACH_Credit_Max_Dollar_Per_Day__c":600,
    "ACH_Debit_Max_Tx_Per_Day__c":5,
  }
}
```

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```
    "ACH_Credit_Max_Tx_Per_Day__c":10,
    "ACH_Debit_Max_Dollar_Per_Month__c":700,
    "ACH_Credit_Max_Dollar_Per_Month__c":800,
    "ACH_Debit_Max_Tx_Per_Month__c":15,
    "ACH_Credit_Max_Tx_Per_Month__c":20
  },
  "Mer":{
    "attributes":{
      "type":"Account"
    },
    "Name":"Test type",
    "Association_ID_API_Field__c":"1111122222",
    "MCC_API_Field__c":"2222",
    "Legal_Name__c":"test legal name 1111",
    "Tax_ID__c":"333333333",
    "State_of_Entity_Formation_Incorporation__c":"CA",
    "Billingstreet":"123 test",
    "BillingCity":"San Jose",
    "Billingstate":"California",
    "Billingpostalcode":"99999",
    "billingcountrycode":"united states",
    "shippingstreet":"333 first st",
    "shippingcity":"san francisco",
    "shippingstate":"California",
    "shippingpostalcode":"88888",
    "shippingcountry":"united states",
    "Physical_Address_Street__c":"444 first st",
    "Physical_Address_City__c":"Palo Alto",
    "Physical_Address_State__c":"CA",
    "Physical_Address_PostalCode__c":"66666",
    "phone":"(444) 555-6666",
    "fax":"777-756-6666",
    "App_Email__c":"test@mes.com",
    "website":"www.mes.com",
    "Customer_Service_Phone__c":"888-888-8888",
    "Ownership":"Government", "industry":"Retail",
    "industry_other__c":"test other",
    "Location_Type__c":"Ecommerce",
    "Location_Other__c":"test other",
    "Years_at_Location__c":"3",
    "Date_Established__c":"2000-12-10",
    "Chain_Non_Chain__c":"Single Outlet",
    "Description":"Test description",
    "Ever_accepted_credit_cards_before__c":"true",
    "Name_of_Previous_Processor__c":"test Processor",
    "Ever_had_a_merchant_account_canceled__c":"true",
    "Name_of_Processor_for_canceled_merchant__c":"test processor",
    "Reason_for_cancellation__c":"test test",
    "Date_of_cancellation__c":"2016-10-05",
    "NAICS_Category_Api_Field__c":"21 (Mining)",
    "NAICS_Sub_Category_Api_Field__c":"111110 Soybean Farming"
  },
  "lstBens":[
    {
      "attributes":{
        "type":"Contact"
      },
      "LastName":"test",
      "FirstName":"test",
      "Title":"test",
      "Phone":"1111111111",
      "Percentage_Owned__c":25,
      "Date_of_Birth__c":"1988-12-05",
      "MailingStreet":"123 Beverly Hills",
      "MailingCity":"Los Angeles",
    }
  ]
}
```

```

    "MailingState":"California",
    "MailingPostalCode":"55555",
    "MailingCountry":"United States",
    "SSN__c":"777777777",
    "Contact_Role__c":"Control Owner;Beneficial Owner",
    "Email":"test2@mes2.com", "Beneficial_Owner_Unique_Field__c":"111"
  },
{
  "attributes":{
    "type":"Contact"
  },
  "LastName":"Test Contact2",
  "FirstName":"Test FirstName2",
  "Title":"Test Title2",
  "Phone":"2222222222",
  "Percentage_Owned__c": "",
  "Date_of_Birth__c":"1980-06-25",
  "MailingStreet":"123 second ave",
  "MailingCity":"Los Angeles",
  "MailingState":"California",
  "MailingPostalCode":"55555",
  "MailingCountry":"United States",
  "SSN__c":"666666666",
  "Contact_Role__c": "", "Email":"test1@mes1.com", "Primary__c":true,
  "Beneficial_Owner_Unique_Field__c":"222"
},
]
"lstbussCheckAcc":[
{
  "attributes":{
    "type":"Business_Checking_Account__c"
  },
  "Bank_Name__c":"wells Fargo",
  "Bank_Street_Address__c":"First street",
  "Bank_City__c":"San Francisco",
  "Bank_State__c":"California",
  "Bank_Zipcode__c":"11111",
  "Checking_Account__c":"1212121212",
  "Transit_Routing__c":"121233333",
  "Years_Open__c":4,
  "DDA_Type__c":"Chargeback",
  "Checking_Account_Unique_Field__c":"111"
},
{
  "attributes":{
    "type":"Business_Checking_Account__c"
  },
  "Bank_Name__c":"wells Fargo",
  "Bank_Street_Address__c":"First street",
  "Bank_City__c":"San Francisco",
  "Bank_State__c":"California",
  "Bank_Zipcode__c":"11111",
  "Checking_Account__c":"1212121222",
  "Transit_Routing__c":"121212121",
  "Years_Open__c":4,
  "DDA_Type__c":"fees;Deposit",
  "Checking_Account_Unique_Field__c":"222"
}
],
"lstqli":[
{
  "attributes":{
    "type":"QuoteLineItem"
  },
  "MerchantE_Invoice__c":true,

```

```
"POS_Terminals__c":true,
"Terminal_Application__c":"Retail",
"Auto_Batch_Close_HR__c":20,
"Auto_Batch_Close_MIN__c":10,
"Receipt_Header_Line_4__c":"test11",
"Receipt_Header_Line_5__c":"test22",
"Receipt_Footer__c":"test33",
"Communication_Type__c":"IP",
"Clerk_Server_Prompt_On__c":"true",
"Invoice_Prompt_On__c":true,
"Phone_training_for_merchant__c":"yes",
"Access_Code_to_dial_out__c":"testtest",
"AVS_On__c":"true",
"Tip_Option_On__c":"true",
"Cash_Back__c":true,
"Batch_Report_Type__c":"Summary",
"Equipment_Shipping_Address__c":"Legal Address",
"Other_Shipping_Address__c":"other",
"MeS_Virtual_Terminal__c":false,
"Level_3__c":false, "Multi_Merchant__c":false,
"MeS_Virtual_Terminal_Limited__c":false,
"Admin_Email_Limited__c":null,
"MeS_Payment_Gateway__c":false,
"URL_Address__c":null,
"Name_of_Certified_Shopping_Cart__c":null,
"Payment_Gateway_Administrator_Email__c":null,
"Processing_Option__c":null,
"MeS_Pay_by_Phone__c":false,
"Other_Solution__c":false,
"Name_of_other_Solution__c":null,
"Solution_Version__c":null,
"Name_of_the_digital_certificate_issuer__c":"test3",
"Digital_certificate_number_s__c":"test4",
"Digital_certificate_expiration_date_s__c":"test5",
"Digital_Certificate_Ownership_Status__c":"Shared",
"V_MC_Acceptance_Options__c":"Both",
"V_MC_Authorization_Fee__c":20,
"V_MC_Diff_Plus_Plan__c":true,
"V_MC_Diff_Plus_Percentage__c":2,
"V_MC_Diff_Plus_Credit_Qualified_Per_Ite__c":50,
"V_MC_Diff_Plus_Credit_Qualified_Rate__c":1.2,
"V_MC_Diff_Plus_Debit_Qualified_Per_Item__c":60,
"V_MC_Diff_Plus_Debit_Qualified_Rate__c":0.9,
"V_MC_Pass_Through_Plan__c":false,
"V_MC_Pass_Through_Per_Item__c":null,
"V_MC_Pass_Through_Rate__c":null,
"V_MC_Tiered_Plan__c":false,
"V_MC_Tiered_Commercial_Qual_Per_Item__c":null,
"V_MC_Tiered_Commercial_Qual_Rate__c":null,
"V_MC_Tiered_Credit_Qualified_Per_Item__c":null,
"V_MC_Tiered_Credit_Qualified_Rate__c":null,
"V_MC_Tiered_Debit_Qualified_Per_Item__c":null,
"V_MC_Tiered_Debit_Qualified_Rate__c":null,
"V_MC_Tiered_Mid_Qual_Per_Item__c":null,
"V_MC_Tiered_Non_Qual_Per_Item__c":null,
"V_MC_Tiered_Non_Qual_Rate__c":null,
"V_MC_Tiered_Rewards_Rate__c":null,
"V_MC_Tiered_Rewards_Rate_Per_Item__c":null,
"Amex_Authorization_Fee__c":35,
"Amex_Tiered_Plan__c":false,
"Amex_Tier_3_Per_Item__c":null,
"Amex_Tier_3_Rate__c":null,
"Amex_Pass_Through_Plan__c":true,
"Amex_Pass_Through_Per_Item__c":36,
"Amex_Pass_Through_Rate__c":2.1,
```

"Pin_Debit_Authorization_Fee__c":10,
"Pin_Debit_Pass_Through_Plan__c":true,
"Pin_Debit_Pass_Through_Rate__c":3,
"Pin_Debit_Pass_Through_Per_Item__c":"","
"ARU__c":21,
"Operator_Asissted__c":22,
"AVS__c":23,
"Bank_Referral__c":24,
"JCB_CUP__c":25,
"EBT__c":26,
"Other_Authorization_Fee_Other_Fee_Name__c":"PayFlow Pro",
"Other_Authorization_Fee_Other_Fee_Name2__c":"test",
"Other_Authorization_Fee_Other_Fee_Amt1__c":27,
"Other_Authorization_Fee_Other_Fee_Amt2__c":28,
"Account_Application__c":29,
"New_Account_Setup__c":30,
"One_Time_Account_Updater__c":31,
"Wireless_Setup__c":32,
"One_Time_Fees_Other_Fee_Name_1__c":"USAPay Setup",
"One_Time_Fees_Other_Fee_Name_2__c":"test",
"One_Time_Fees_Other_Fee_Amount_1__c":33,
"One_Time_Fees_Other_Fee_Amount_2__c":34,
"Minimum_Discount__c":40,
"Chargeback_Fee__c":41,
"Return_NSF__c":42,
"Batch_Fee__c":43,
"Internet_Per_Trans__c":1.5,
"Per_Occurrence_Account_Updater__c":44,
"Yearly_Admin__c":45,
"Per_Occurrence_Other_Fee_Name_1__c":"test1",
"Per_Occurrence_Other_Fee_Name_2__c":"test2",
"Per_Occurrence_Other_Fee_Amount_1__c":50,
"Per_Occurrence_Other_Fee_Amount_2__c":51,
"Statement_Fee__c":100,
"Electronic_Statement__c":true,
"Paper_Statement__c":true,
"PCI_Admin_Monthly__c":50,
"PCI_Late_Validation__c":25,
"Wireless_Fees__c":30,
"Monthly_Fees_Other_Fee_Name_1__c":"USAPay Monthly",
"Monthly_Fees_Other_Fee_Name_2__c":"PayFlow Pro Monthly",
"Monthly_Fees_Other_Fee_Name_3__c":"test",
"Monthly_Fees_Other_Fee_Name_4__c":"test",
"Monthly_Fees_Other_Fee_Amount_1__c":10,
"Monthly_Fees_Other_Fee_Amount_2__c":20,
"Monthly_Fees_Other_Fee_Amount_3__c":30,
"Monthly_Fees_Other_Fee_Amount_4__c":40,
"ACH_Transaction_Fee_Amount__c":100,
"ACH_Transaction_Fee__c":0.9,
"ACH_Monthly_Service_Fee__c":60,
"ACH_Return_Re_presentation_Fee__c":70,
"ACH_Unauthorized_Return_State_Fee__c":80,
"ACH_SmartPay_Express_Setup_Fee__c":90,
"ACH_SmartPay_Express_Monthly_Fee__c":50,
"ACH_Hosted_Pay_Monthly_Fee__c":40,
"Gross_Settlement_Fee__c":0.5,
"ACH_Services__c":true,
"ACH_Web_API__c":true,
"ACH_NACHA_File__c":true,
"ACH_CPP__c":true,
"ACH_Debit__c":true,
"ACH_Recurring_Debit__c":true,
"ACH_Credit__c":true,
"ACH_Recurring_Credit__c":true,
"ACH_Refund__c":true,

```

    "ACH_web_Check__c":true,
    "ACH_Tel_Check__c":true,
    "ACH_Max_Re_Presentments__c":"0~ None",
    "ACH_First_Re_Presentation__c":"1 (1 day following ACH return)",
    "ACH_Final_Re_Presentation__c":"0~ Final ACH re-presentation will occur after a
fixed number of days",
    "ACH_Final_Re_Presentation_Days__c":2,
    "ACH_RCF_Max_Re_Presentments__c":"1~",
    "ACH_RCF_Amount__c":20,
    "ACH_RCF_Settlement_Account__c":"1~ Deposit collected fees into other bank
account",
    "ACH_Addtional_Location_Monthly_Fee__c":5,
    "ACH_Addtional_Bk_Account_Monthly_Fee__c":6
  },
  "attributes":{
    "type":"QuoteLineItem"
  },
  "Equipment_Rent_Buy_Own__c":"rent",
  "Equipment_Per_Item__c":200,
  "Equipment_Quantity__c":2,
  "Equipment_Months__c":6,
  "Product_Name__c":"Batch Processing",
  "Equipment_Unique_Field__c":"111"
},
  "attributes":{
    "type":"QuoteLineItem"
  },
  "Equipment_Rent_Buy_Own__c":"buy",
  "Equipment_Per_Item__c":200,
  "Equipment_Quantity__c":2,
  "Equipment_Months__c":6, "Product_Name__c":"Chargeback API",
  "Equipment_Unique_Field__c":"222"
}
]

```

Create Response

The following JSON structure is the expected response from the above request: **Create Response JSON**

```

[
  {
    "Success": true, "SourceId": null,
    "SFid": "0011800000Yki5NAAV",
    "ObjectType": "Account",
    "Message": "Merchant Information Created Successfully."
  },
  {
    "Success": true, "SourceId": "111",
    "SFid": "0031800000SwFD0AA3",
    "ObjectType": "Contact",
    "Message": "Beneficial Owner Created Successfully."
  },
  {
    "Success": true, "SourceId": "222",
    "SFid": "0031800000SwFDPA3",
    "ObjectType": "Contact",
    "Message": "Beneficial Owner Created Successfully."
  }
]

```

```

    "Success": true, "SourceId": "111",
    "SFid": "a3h1800000blAWAAY",
    "ObjectType": "Business Checking Account",
    "Message": "Business Checking Account Created Successfully."
  },
  "Success": true, "SourceId": "222",
  "SFid": "a3h1800000blAXAAY",
  "ObjectType": "Business Checking Account",
  "Message": "Business Checking Account Created Successfully."
  },
  "Success": true, "SourceId": null,
  "SFid": "00618000006PckHAAW",
  "ObjectType": "Opportunity",
  "Message": "Transaction/Payment Options Created Successfully."
  },
  "Success": true, "SourceId": null,
  "SFid": "0Q01800000020nxC AA",
  "ObjectType": "Quote",
  "Message": "Record Created Successfully."
  },
  "Success": true, "SourceId": null,
  "SFid": "0QL1800000028mnGAA",
  "ObjectType": "QuoteLineItem",
  "Message": "Solution & Fees Created Successfully."
  },
  "Success": true, "SourceId": "111",
  "SFid": "0QL1800000028moGAA",
  "ObjectType": "QuoteLineItem",
  "Message": "Equipment Created Successfully."
  },
  "Success": true, "SourceId": "222",
  "SFid": "0QL1800000028mpGAA",
  "ObjectType": "QuoteLineItem",
  "Message": "Equipment Created Successfully."
}
]

```

Update Request

Note: The "id" field below represents the SFid of the ObjectType being updated. The following JSON structure should be utilized for an update request, which includes the object update IDs: **Update Request JSON**

```

{
  "Opp": {
    "attributes": {
      "type": "Opportunity"
    }
  },
  "id": "00618000006PckHAAW",
  "Merchant_Application_Notes__c": "Test",
  "BET_Table_ID_API_Field__c": "2222",
  "Yearly_Net_Revenue__c": null,
  "Yearly_Card_Volume__c": 100,
  "High_Monthly_Volume__c": 200,
  "Avg_Ticket__c": 300,
  "High_Ticket__c": 400,
  "Visa_MC_Discover_Volume__c": 500,
  "American_Express_Volume__c": 600,

```

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```

"Seasonal_Months__c":"Jan;Feb",
"Customer_Type_B2B_Sales__c":null,
"Customer_Type_B2C_Sales__c":100,
"Refund_Policy__c":"Exchanges Only",
"Days_to_Ship_Deliver__c":"1 to 7",
"Advanced_Payments__c":45,
"Visa_MasterCard__c":true,
"Discover_MeS_Settlement__c":true,
"Discover_Settlement_Existing_Merchant__c":true,
"American_Express_MeS_Settlement__c":true,
"Amex_Settlement_Existing_SE__c":"test Amex",
"Debit_with_Pin__c":true,
"ACH__c":"true",
"EBT__c":"true",
"FCS__c":"test fcs",
"Check_Authorization__c":"true",
"Name_of_Provider__c":"test Name of provider",
"Merchant__c":"test merchant",
"Check_pct__c":55, "Card_Network_Volume_Internet_CNP__c":20,
"Card_Network_Volume_Manually_K_M__c":20,
"Card_Network_Volume_MO_TO_CNP__c":20,
"Card_Network_Volume_Swiped_CP__c":40,
  "ACH_Debit_Avg_Dollar_Per_Tx__c":100,
  "ACH_Credit_Avg_Dollar_Per_Tx__c":200,
  "ACH_Debit_Max_Dollar_Per_Tx__c":300,
  "ACH_Credit_Max_Dollar_Per_Tx__c":400,
  "ACH_Debit_Max_Dollar_Per_Day__c":500,
  "ACH_Credit_Max_Dollar_Per_Day__c":600,
  "ACH_Debit_Max_Tx_Per_Day__c":5,
  "ACH_Credit_Max_Tx_Per_Day__c":10,
  "ACH_Debit_Max_Dollar_Per_Month__c":700,
  "ACH_Credit_Max_Dollar_Per_Month__c":800,
  "ACH_Debit_Max_Tx_Per_Month__c":15,
  "ACH_Credit_Max_Tx_Per_Month__c":20
},
"Mer":{
  "attributes":{
    "type":"Account"
  },
  "id":"0011800000YKI5NAAV",
  "Name":"Test type",
  "Association_ID_API_Field__c":"1111122222",
  "MCC_API_Field__c":"2222",
  "Legal_Name__c":"test legal name 1111",
  "Tax_ID__c":"333333333",
  "State_of_Entity_Formation_Incorporation__c":"CA",
  "Billingstreet":"123 test",
  "BillingCity":"San Jose",
  "Billingstate":"California",
  "Billingpostalcode":"99999",
  "BillingCountryCode":"united states",
  "shippingstreet":"333 first st",
  "shippingcity":"san francisco",
  "shippingstate":"California",
  "shippingpostalcode":"88888",
  "shippingcountry":"united states",
  "Physical_Address_Street__c":"444 first st",
  "Physical_Address_City__c":"Palo Alto",
  "Physical_Address_State__c":"CA",
  "Physical_Address_PostalCode__c":"66666",
  "phone":"(444) 555-6666",
  "fax":"777-756-6666",
  "App_Email__c":"test@mes.com",
  "website":"www.mes.com",
  "Customer_Service_Phone__c":"888-888-8888",

```

```

"Ownership":"Government",
"industry":"Retail",
"industry_other__c":"test other",
"Location_Type__c":"Ecommerce",
"Location_Other__c":"test other",
"Years_at_Location__c":"3",
"Date_Established__c":"2000-12-10",
"Chain_Non_Chain__c":"Single Outlet",
"Description":"Test description",
"Ever_accepted_credit_cards_before__c":"true",
"Name_of_Previous_Processor__c":"test Processor",
"Ever_had_a_merchant_account_canceled__c":"true",
"Name_of_Processor_for_canceled_merchant__c":"test processor",
"Reason_for_cancellation__c":"test test",
"Date_of_cancellation__c":"2016-10-05",
"NAICS_Category_Api_Field__c":"21 (Mining)",
  "NAICS_Sub_Category_Api_Field__c":"111110 Soybean Farming"
},
"lstBens":[
  {
    "attributes":{
      "type":"Contact"
    },
    "id":"0031800000SwFDOAA3",
    "LastName":"test",
    "FirstName":"test",
    "Title":"test",
    "Phone":"1111111111",
    "Percentage_Owned__c":"25",
    "Date_of_Birth__c":"1988-12-05",
    "MailingStreet":"123 Beverly Hills",
    "MailingCity":"Los Angeles",
    "MailingState":"California",
    "MailingPostalCode":"55555",
    "MailingCountry":"United States",
    "SSN__c":"777777777",
    "Contact_Role__c":"Control Owner;Beneficial Owner",
    "Email":"test2@mes2.com",
    "Beneficial_Owner_Unique_Field__c":"111"
  },
  {
    "attributes":{
      "type":"Contact"
    },
    "id":"0031800000SwFDPAA3",
    "LastName":"Test Contact2",
    "FirstName":"Test FirstName2",
    "Title":"Test Title2",
    "Phone":"2222222222",
    "Percentage_Owned__c":"",
    "Date_of_Birth__c":"1980-06-25",
    "MailingStreet":"123 second ave",
    "MailingCity":"Los Angeles",
    "MailingState":"California",
    "MailingPostalCode":"55555",
    "MailingCountry":"United States",
    "SSN__c":"666666666",
    "Contact_Role__c":"",
    "Email":"test1@mes1.com",
    "primary__c":true,
    "Beneficial_Owner_Unique_Field__c":"222"
  }
],
"lstbussCheckAcc":[
  {

```



```

"attributes":{
  "type":"Business_Checking_Account__c"
},
{id":"a3h18000000blAWAAY",
"Bank_Name__c":"Wells Fargo",
"Bank_Street_Address__c":"First street",
"Bank_City__c":"San Francisco",
"Bank_State__c":"California",
"Bank_Zipcode__c":"11111",
"Checking_Account__c":"1212121212",
"Transit_Routing__c":"121233333",
"Years_Open__c":4,
"DDA_Type__c":"Fees;Deposit",
"Checking_Account_Unique_Field__c":"111"
},
{
  "attributes":{
    "type":"Business_Checking_Account__c"
  },
  "id":"a3h18000000blAXAAY",
  "Bank_Name__c":"Wells Fargo",
  "Bank_Street_Address__c":"First street",
  "Bank_City__c":"San Francisco",
  "Bank_State__c":"California",
  "Bank_Zipcode__c":"11111",
  "Checking_Account__c":"1212121222",
  "Transit_Routing__c":"121212121",
  "Years_Open__c":4,
  "DDA_Type__c":"Chargeback",
  "Checking_Account_Unique_Field__c":"222"
}
],
"lstqli":[
{
  "attributes":{
    "type":"QuoteLineItem"
  },
  "Id":"0QL1800000028mnGAA",
  "MerchantE_Invoice__c": true,
  "POS_Terminals__c":true,
  "Terminal_Application__c":"Retail",
  "Auto_Batch_Close_HR__c":20,
  "Auto_Batch_Close_MIN__c":10,
  "Receipt_Header_Line_4__c":"test11",
  "Receipt_Header_Line_5__c":"test22",
  "Receipt_Footer__c":"test33",
  "Communication_Type__c":"IP",
  "Clerk_Server_Prompt_On__c":"true",
  "Invoice_Prompt_On__c":true,
  "Phone_training_for_merchant__c":"yes",
  "Access_Code_to_dial_out__c":"testtest",
  "AVS_On__c":"true",
  "Tip_Option_On__c":"true",
  "Cash_Back__c":true,
  "Batch_Report_Type__c":"Summary",
  "Equipment_Shipping_Address__c":"Legal Address",
  "Other_Shipping_Address__c":"other",
  "MeS_Virtual_Terminal__c":false,
  "Admin_Email__c":null, "Level_3__c":false,
  "Multi_Merchant__c":false,
  "MeS_Virtual_Terminal_Limited__c":false,
  "Admin_Email_Limited__c":null,
  "MeS_Payment_Gateway__c":false,
  "URL_Address__c":null,
  "Name_of_Certified_Shopping_Cart__c":null,

```

```
"Payment_Gateway_Administrator_Email__c":null,
"Processing_Option__c":null,
"MeS_Pay_by_Phone__c":false,
"Other_Solution__c":false,
"Name_of_other_Solution__c":null,
"Solution_Version__c":null,
"Name_of_the_digital_certificate_issuer__c":"test3",
"Digital_certificate_number_s__c":"test4",
"Digital_certificate_expiration_date_s__c":"test5",
"Digital_Certificate_Ownership_Status__c":"Shared",
"V_MC_Acceptance_Options__c":"Both", "V_MC_Authorization_Fee__c":20,
"V_MC_Diff_Plus_Plan__c":true, "V_MC_Diff_Plus_Percentage__c":2,
"V_MC_Diff_Plus_Credit_Qualified_Per_Ite__c":50,
"V_MC_Diff_Plus_Credit_Qualified_Rate__c":1.2,
"V_MC_Diff_Plus_Debit_Qualified_Per_Item__c":60,
"V_MC_Diff_Plus_Debit_Qualified_Rate__c":0.9,
"V_MC_Pass_Through_Plan__c":false,
"V_MC_Pass_Through_Per_Item__c":null,
"V_MC_Pass_Through_Rate__c":null, "V_MC_Tiered_Plan__c":false,
"V_MC_Tiered_Commercial_Qual_Per_Item__c":null,
"V_MC_Tiered_Commercial_Qual_Rate__c":null,
"V_MC_Tiered_Credit_Qualified_Per_Item__c":null,
"V_MC_Tiered_Credit_Qualified_Rate__c":null,
"V_MC_Tiered_Debit_Qualified_Per_Item__c":null,
"V_MC_Tiered_Debit_Qualified_Rate__c":null,
"V_MC_Tiered_Mid_Qual_Per_Item__c":null,
"V_MC_Tiered_Mid_Qual_Rate__c":null,
"V_MC_Tiered_Non_Qual_Per_Item__c":null,
"V_MC_Tiered_Non_Qual_Rate__c":null,
"V_MC_Tiered_Rewards_Rate__c":null,
"V_MC_Tiered_Rewards_Rate_Per_Item__c":null,
"Amex_Authorization_Fee__c":35,
"Amex_Tiered_Plan__c":false,
"Amex_Tier_3_Per_Item__c":null,
"Amex_Tier_3_Rate__c":null,
"Amex_Pass_Through_Plan__c":true,
"Amex_Pass_Through_Per_Item__c":36,
"Amex_Pass_Through_Rate__c":2.1,
"Pin_Debit_Authorization_Fee__c":10,
"Pin_Debit_Pass_Through_Plan__c":true,
"Pin_Debit_Pass_Through_Rate__c":3,
"Pin_Debit_Pass_Through_Per_Item__c": "",
"ARU__c":21,
"Operator_Asissted__c":22,
"AVS__c":23,
"Bank_Referral__c":24,
"JCB_CUP__c":25,
"EBT__c":26,
"Other_Authorization_Fee_Other_Fee_Name__c":"PayFlow Pro",
"Other_Authorization_Fee_Other_Fee_Name2__c":"test",
"Other_Authorization_Fee_Other_Fee_Amt1__c":27,
"Other_Authorization_Fee_Other_Fee_Amt2__c":28,
"Account_Application__c":29,
"New_Account_Setup__c":30,
"One_Time_Account_Updater__c":31,
"Wireless_Setup__c":32,
"One_Time_Fees_Other_Fee_Name_1__c":"USAPay Setup",
"One_Time_Fees_Other_Fee_Name_2__c":"test",
"One_Time_Fees_Other_Fee_Amount_1__c":33,
"One_Time_Fees_Other_Fee_Amount_2__c":34,
"Minimum_Discount__c":40,
"Chargeback_Fee__c":41,
"Return_NSF__c":42,
"Batch_Fee__c":43,
"Internet_Per_Trans__c":1.5,
```

```

"Per_Occurrence_Account_Updater__c":44,
"Yearly_Admin__c":45,
"Per_Occurrence_Other_Fee_Name_1__c":"test1",
"Per_Occurrence_Other_Fee_Name_2__c":"test2",
"Per_Occurrence_Other_Fee_Amount_1__c":50,
"Per_Occurrence_Other_Fee_Amount_2__c":51,
"Statement_Fee__c":100,
"Electronic_Statement__c":true,
"Paper_Statement__c":true,
"PCI_Admin_Monthly__c":50,
"PCI_Late_Validation__c":25,
"Wireless_Fees__c":30,
"Monthly_Fees_Other_Fee_Name_1__c":"USAePay Monthly",
"Monthly_Fees_Other_Fee_Name_2__c":"PayFlow Pro Monthly",
"Monthly_Fees_Other_Fee_Name_3__c":"test",
"Monthly_Fees_Other_Fee_Name_4__c":"test",
"Monthly_Fees_Other_Fee_Amount_1__c":10,
"Monthly_Fees_Other_Fee_Amount_2__c":20,
"Monthly_Fees_Other_Fee_Amount_3__c":30,
"Monthly_Fees_Other_Fee_Amount_4__c":40,
"ACH_Transaction_Fee_Amount__c":100,
"ACH_Transaction_Fee__c":0.9,
"ACH_Monthly_Service_Fee__c":60,
"ACH_Return_Re_presentation_Fee__c":70,
"ACH_Unauthorized_Return_State_Fee__c":80,
"ACH_SmartPay_Express_Setup_Fee__c":90,
"ACH_SmartPay_Express_Monthly_Fee__c":50,
"ACH_Hosted_Pay_Monthly_Fee__c":40,
"Gross_Settlement_Fee__c":0.5,
"ACH_Services__c":true,
  "ACH_Web_API__c":true,
  "ACH_NACHA_File__c":true,
  "ACH_CPP__c":true,
  "ACH_Debit__c":true,
  "ACH_Recurring_Debit__c":true,
  "ACH_Credit__c":true,
  "ACH_Recurring_Credit__c":true,
  "ACH_Refund__c":true,
  "ACH_Web_Check__c":true,
  "ACH_Tel_Check__c":true,
  "ACH_Max_Re_Presentments__c":"0~ None",
"ACH_First_Re_Presentation__c":"1 (1 day following ACH return)",
"ACH_Final_Re_Presentation__c":"0~ Final ACH re-presentation will occur after a fixed
number of days",
"ACH_Final_Re_Presentation_Days__c":2,
"ACH_RCF_Max_Re_Presentments__c":"1~",
"ACH_RCF_Amount__c":20,
"ACH_RCF_Settlement_Account__c":"1~ Deposit collected fees into other bank
account",
"ACH_Additional_Location_Monthly_Fee__c":5,
"ACH_Additional_Bk_Account_Monthly_Fee__c":6
},
{
  "attributes":{
    "type":"QuoteLineItem"
  },
  "id":"0QL1800000028moGAA",
  "Equipment_Rent_Buy_Own__c":"rent",
  "Equipment_Per_Item__c":200,
  "Equipment_Quantity__c":2,
  "Equipment_Months__c":6,
  "Product_Name__c":"Batch Processing",
  "Equipment_Unique_Field__c":"111"
},

```

```
"attributes":{
  "type":"QuoteLineItem"
},
"id":"0QL1800000028mpGAA",
"Equipment_Rent_Buy_Own__c":"buy",
"Equipment_Per_Item__c":200,
"Equipment_Quantity__c":2,
"Equipment_Months__c":6,
"Product_Name__c":"Chargeback API",
"Equipment_Unique_Field__c":"222"
}
```

Update Response

The following JSON structure is the expected response from the above request: **Update Response JSON**

```
{
  "Success": true,
  "SourceId": null,
  "SFid": "0011800000YKI5NAAV",
  "ObjectType": "Account",
  "Message": "Merchant Information Updated Successfully."
},
{
  "Success": true,
  "SourceId": "111",
  "SFid": "0031800000SwFDOAA3",
  "ObjectType": "Contact",
  "Message": "Beneficial Owner Updated Successfully."
},
{
  "Success": true,
  "SourceId": "222",
  "SFid": "0031800000SwFDPAA3",
  "ObjectType": "Contact",
  "Message": "Beneficial Owner Updated Successfully."
},
{
  "Success": true,
  "SourceId": "111",
  "SFid": "a3h18000000blAWAAY",
  "ObjectType": "Business Checking Account",
  "Message": "Business Checking Account Updated Successfully."
},
{
  "Success": true,
  "SourceId": "222",
  "SFid": "a3h18000000blAXAAY",
  "ObjectType": "Business Checking Account",
  "Message": "Business Checking Account Updated Successfully."
},
{
  "Success": true,
  "SourceId": null,
  "SFid": "00618000006PckHAAW",
  "ObjectType": "Opportunity",
  "Message": "Transaction/Payment Options Updated Successfully."
}
```

```
"Success": true,
"SourceId": null,
"SFid": "0Q01800000020nxCAA",
"ObjectType": "Quote",
"Message": "Record Updated Successfully."
},
{
"Success": true,
"SourceId": null,
"SFid": "0QL1800000028mnGAA",
"ObjectType": "QuoteLineItem",
"Message": "Solution & Fees Updated Successfully."
},
{
"Success": true,
"SourceId": "111",
"SFid": "0QL1800000028moGAA",
"ObjectType": "QuoteLineItem",
"Message": "Equipment Updated Successfully."
},
{
"Success": true,
"SourceId": "222",
"SFid": "0QL1800000028mpGAA",
"ObjectType": "QuoteLineItem",
"Message": "Equipment Updated Successfully."
}
```

Attachment Submission

Note: Opportunity ID is a required field for submitting attachments. This request contains both a plain text and an image file converted to Base64.

File Attachment Size Limit: 100 MB

```
{
  "Opportunity":{
    "Id":"006q000000EcFFdAAJ"
  },
  "attachments":[
    {
      "Body":"d29ybGQ=",
      "ContentType":"text/plain",
      "Name":"hello.txt"
    },
    {
      "Body":"**Converted image to Base64 as text** ",
      "ContentType":"image/png",
      "Name":"picture.png"
    }
  ]
}
```

GET Created Records

Utilizing information from the Create Application Response, a request can be made to retrieve information for review. Below are the API endpoints used to retrieve information. `Opportunity_Id` refers to the SFId value associated with the *ObjectType: Opportunity*. Similarly, `Quote_Id` refers to the SFId value associated with the *ObjectType: Quote*.

GET Opportunity

https://merchante-solutions.my.salesforce.com/services/data/v54.0/subjects/Opportunity/{Opportunity_Id}

GET Account

https://merchante-solutions.my.salesforce.com/services/data/v54.0/subjects/Opportunity/{Opportunity_Id}/Account

GET Contacts

https://merchante-solutions.my.salesforce.com/services/data/v54.0/subjects/Opportunity/{Opportunity_Id}/Account/Contacts

GET Business Checking Accounts

https://merchante-solutions.my.salesforce.com/services/data/v54.0/subjects/Opportunity/{Opportunity_Id}/Account/Business_Checking_Accounts__r

GET Quotes

https://merchante-solutions.my.salesforce.com/services/data/v54.0/subjects/Opportunity/{Opportunity_Id}/Quotes

GET Quote Line Items

https://merchante-solutions.my.salesforce.com/services/data/v54.0/subjects/Quote/{Quote_Id}/QuoteLineItems

Business and Owner Descriptions

Key parts of any merchant application include defining the *business entity type* and the *ownership role* of the beneficial owner(s). The following fields are included on the merchant application and can be transmitted through the **Partner to Portal API**.

Business Entity Type

Entity or Business Type	Information Required On:	Data Required	Notes
Sole Proprietorship (one single owner)	Sole Owner (principal)	<ul style="list-style-type: none"> • Full Name • Physical Address • Social Security Number • DOB 	Sole Proprietorships can only have one owner
Partnership, Limited Liability Company, Privately Held Corporation	Any Owner with 25% or more ownership interest, and Controlling Authority (one individual only)	<ul style="list-style-type: none"> • Full Name • Physical Address • Social Security Number • DOB • % Ownership • Title 	It is possible for an owner to also satisfy the obligation of Controlling Authority in the business.
Tax Exempt (e.g. NPO, Political Campaign)	Controlling Authority (one individual only)	<ul style="list-style-type: none"> • Full Name • Physical Address • Social Security Number • DOB • Title 	Tax Exempt entity must be granted tax exempt status from the IRS via a 501(c)(2)(3) form
Government	Controlling Authority (one individual only)	<ul style="list-style-type: none"> • Full Name • Title 	Applies to Federal, State, and Local
Publicly Traded Corporation	Controlling Authority (one individual only)	<ul style="list-style-type: none"> • Full Name • Title 	A US Public Corporation trades on a US Stock Exchange such as the NASDAQ or NYSE. UW must collect the Company's Ticker Symbol (can be entered on the notes section).
Financial Institution	Controlling Authority (one individual only)	<ul style="list-style-type: none"> • Full Name • Title 	A Corporation Entity type, whether Public or Private, can also be a Financial Institution. If the Financial Institution is regulated by a Federal or State regulator, only the full name and title is required on the Controlling Authority at the Financial Institution.

Ownership Roles

Definitions	Descriptions
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Owner (Ownership Prong)	Each individual, if any, who, directly or indirectly, through any contract, arrangement, understanding, relationship or otherwise, owns 25% or more of the equity interest of a merchant.
Controlling Authority (Control Prong)	A single individual with significant responsibility for managing the merchant, such as an executive officer or senior manager (e.g., Chief Executive Officer, Chief Financial Officer, Chief Operating Officer, Managing Member, General Partner, President, Vice-President, Treasurer, or any other individual who regularly performs similar functions).
Signing Authority	A signing authority can be either an owner or a controlling authority (or both, if applicable).

Request Field Data

The following fields are included on the merchant application and can be transmitted through the **Partner to Portal API**.

Merchant Information

The Merchant Information section of the API collects demographic information about the merchant. **Merchant Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
Legal Name	Legal Name	Legal_Name__c	Account	String	Text		100	Yes
Federal Tax ID	Federal Tax ID	TAX_ID__c	Account	String	Text		16	Yes
State of Formation/Incorporation	State of Formation/Incorporation	State_of_Entity_Formation_Incorporation__c	Account	String	Picklist	<ul style="list-style-type: none"> • AK • AL • AR • AZ • CA • CO • CT • DC • DE • FL • GA • HI • IA • ID • IL • IN • KS • KY • LA • MA • MD • ME • MI • MN • MO • MS • MT • NC • ND • NE • NH 	2	Yes

						<ul style="list-style-type: none"> • NJ • NM • NV • NY • OH • OK • OR • PA • PR • RI • SC • SD • TN • TX • UT • VA • VT • WA • WI • WV • WY 		
Legal Street Address	Legal Street	BillingStreet	Account	String	TextArea		255	Yes
Legal City	Legal City	BillingCity	Account	String	String		40	Yes
Legal State	Legal State/Province Code	BillingStateCode	Account	String	Picklist	See Below	80	Yes
Legal Zip Code	Legal Zip/Postal Code	BillingPostalCode	Account	String	String		20	Yes
Legal Country	Legal Country Code	BillingCountryCode	Account	String	Picklist	See Below	80	Yes
Merchant DBA Name	Account Name	Name	Account	String	Name		255	Yes
Merchant DBA Street	DBA Street	ShippingStreet	Account	String	TextArea		255	Yes No
Merchant DBA City	DBA City	ShippingCity	Account	String	String		40	No
Merchant DBA State	DBA State/Province Code	ShippingStateCode	Account	String	Picklist	See Below	80	No
Merchant DBA Zip Code	DBA Zip/Postal Code	ShippingPostalCode	Account	String	String		20	No
Merchant DBA Country	DBA Country Code	ShippingCountryCode	Accounting	String	Picklist	See Below	80	No

Mailing Street	Physical Address Street	Physical_Address_Street__c	Account	String	TextArea		255	No
Mailing City	Physical Address City	Physical_Address_City__c	Account	String	String		80	No
Mailing State	Physical Address State	Physical_Address_State__c	Account	String	Picklist	See Below	80	No
Mailing Zip Code	Physical Address Postal Code	Physical_Address_PostalCode__c	Account	String	String		80	No
Phone	Phone	Phone	Account	String	Phone		10	Yes
Fax	Fax	Fax	Account	String	Phone		10	No
Email Address	App Email	App_Email__c	Account	String	Text		100	Yes
Website Address	Website	Website	Account	String	URL		255	No
Customer Service Phone	Customer Service Phone	Customer_Service_Phone__c	Account	String	Phone		10	Yes
Legal Entity Type	Ownership	Ownership	Account	String	Picklist	<ul style="list-style-type: none"> • Sole Proprietors hip • Publically Traded Limited Liability Company • Privately Held Limited Liability Company • Publically Traded Corporation • Privately Held Corporation • Government • Tax Exempt • • Publically Traded 	255	Yes

						<ul style="list-style-type: none"> Partnership Privately Held Partnership Financial Institution 		
Industry	Industry	Industry	Account	String	Picklist	<ul style="list-style-type: none"> Retail Restaurant Lodging Supermarket Ecommerce Direct Marketing Services Cash Advance Other 	255	Yes
Industry: Other textbox	Industry Other	Industry_Other__c	Account	String	String		100	No
Business Location	Location Type	Location_Type__c	Account	String	Picklist	<ul style="list-style-type: none"> Ecommerce Business Office Private Residence Retail Storefront Bank Other 	255	Yes
Business Location: Other textbox	Location Other	Location_Other__c	Account	String	String		100	No
Years at Location	Years at Location	Years_at_Location__c	Account	Integer	Double		4	Yes
Date Established	Date Established	Date_Established__c	Account	Date	Date			Yes
Chain/Non-Chain	Chain/Non-Chain	Chain_Non_Chain__c	Account	String	Picklist	<ul style="list-style-type: none"> Single Outlet Chain/Multi-Location Additional Location 	255	Yes

Description	Description	Description	Account	String	Long Text Area		32000	Yes
Ever accepted credit cards before?	Ever accepted credit cards before?	Ever_accepted_credit_card_before__c	Account	Boolean	Boolean			No
If yes, name of processor?	Name of previous processor	Name_of_Previous_Processor__c	Account	String	String		100	No
Ever had a merchant account canceled?	Ever had a merchant account canceled?	Ever_had_a_merchant_account_canceled__c	Account	Boolean	Boolean			No
If yes, name of processor?	Name of processor for canceled merchant	Name_of_Processor_for_canceled_merchant__c	Account	String	String		100	No
Reason for Cancellation	Reason for cancellation	Reason_for_cancellation__c	Account	String	String		255	No
Date of Cancellation (MMYY):	Date of cancellation	Date_of_cancellation__c	Account	Date	Date		255	No
High Risk Sub-Category	High Risk Sub-Category	Merchant_Category__c	Account	String	Picklist	<ul style="list-style-type: none"> • None • Business Opportunity • CBD and CBD Based Products • Consumer Lending • Credit Repair • Dating • Discount Membership • Document Prep Services • Firearms/Ammunition 	255	No

						<ul style="list-style-type: none"> • ID Theft/Address Change/Visa and Passport Services • Marketplaces (Non-Travel) - Case by Case • MLM - Case by Case • Money Transfer/MSB • Multi-Level Marketing • Not Applicable • Nutra • Online Gaming/Fantasy Sports • Other • Personal Credit Protection • Telemed/Pharmacies • Vape • Warranties • Web Related Services 		
Sponsorship	Sponsorship	Sponsorship__c	Account	Picklist		<ul style="list-style-type: none"> • Wells Fargo • Synovus • Fresno First • KeyBank • Synovus Sabre • Synovus Transcom 	•	Yes

Bank Name	Bank Name	Bank_Name__c	Business Checking Account	String	String		255	
Bank Street Address	Bank Street Address	Bank_Street_Address__c	Business Checking Account	String	String		255	Yes
Bank City	Bank City	Bank_City__c	Business Checking Account	String	String		100	Yes
Bank State	Bank State	Bank_State__c	Business Checking Account	String	Picklist	See Below - US States Only	100	Yes
Bank Zipcode	Bank Zipcode	Bank_Zipcode__c	Business Checking Account	String	String		20	Yes
Checking Account #	Checking Account #	Checking_Account__c	Business Checking Account	Integer	Integer		100	Yes
Transit Routing #	Transit Routing #	Transit_Routing__c	Business Checking Account	String	String		100	Yes
Years Open	Years Open	Years_Open__c	Business Checking Account	Integer	Integer		18	Yes
NAICS Category	NAICS Category	NAICS_Category__c	Account	String (Id)	Lookup		50	No
NAICS Sub Category	NAICS Sub Category	NAICS_Sub_Category__c	Account	String (Id)	Lookup		50	No
DDA Type	DDA Type	DDA_Type__c	Business Checking Account	String	Multi-Picklist	<ul style="list-style-type: none"> • None • Deposit • Chargeback • Fees 	4099	Yes
	Checking Account Unique Field	Checking_Account_Unique_Field__c	Business Checking Account	String	Text		20	Yes
Contact Phone	Phone	Phone	Contact	String	Phone		10	Yes
	Master Merchant Agreement Execution Date	Master_Merchant_Agreement_Execution_Date__c	Account	Date	Date			No
	Primary MID	Primary_MID__c	Account	Text	Text		12	No

State and Country Codes

BillingStateCode and ShippingStateCode picklist values:		BillingCountryCode and ShippingCountryCode:		
None	Nevada	None	Gabon	Oman
Alabama	New Hampshire	Afghanistan	Gambia	Pakistan
Alaska	New Jersey	Aland Islands	Georgia	Palestinian Territory, Occupied
American Samoa	New Mexico	Albania	Germany	Panama
Arizona	New York	Algeria	Ghana	Papau New Guinea
Arkansas	North Carolina	Andorra	Gibraltar	Paraguay
Armed Forces Americas	North Dakota	Angola	Greece	Peru
Armed Forces Euorpe	Northern Mariana Islands	Anguilla	Greenland	Phillipines
Armed Forces Pacific	Ohio	Antartica	Grenada	Pitcairn
California	Oklahoma	Antigua and Barbuda	Guadeloupe	Poland
Colorado	Oregon	Argentina	Guatemala	Portugal
Connecticut	Palau	Armenia	Guernsey	Qatar
Delaware	Pennsylvania	Aruba	Guinea	Reunion
District of Columbia	Puerto Rico	Australia	Guinea Bissau	Romania
Federated Micronesia	Rhode Island	Austria	Guyana	Rwanda
Florida	South Carolina	Azerbaijan	Haiti	Saint Barthelemy
Georiga	South Dakota	Bahamas	Heard Island and Mcdonald Islands	Saint Helena, Ascension, and Tristan da Cunha
Guam	Tennessee	Bahrain	Holy See (Vatican City)	Sait Kitts and Nevis
Hawaii	Texas	Bangladesh	Honduras	Saint Lucia
Idaho	United States Minor Outlying Islands	Barbados	Hungary	Saint Martin (French)
Illinois	United States Virgin Islands	Belarus	Iceland	Saint Pierre and Miquelon
Indiana	Utah	Belguim	India	Saint Vincent and the Grenadines
Iowa	Vermont	Belize	Indonesia	Samoa
Kansas	Virginia	Benin	Iran, Islamic Republic of	San Marino
Kentucky	Washington	Bermuda	Iraq	Sao Tome and Principe
Louisiana	West Virginia	Bhutan	Ireland	Saudi Arabia
Maine	Wisconsin	Bolivia, Plurinational State of Bonaire, Sint Eustatius and Saba	Island of Man	Senegal

Marshall Islands	Wyoming	Bosnia and Herzegovina	Israel	Serbia
Maryland		Botswana	Italy	Seychelles
Massachusetts		Bouvet Island	Jamaica	Sierra Leone
Michigan		Brazil	Japan	Singapore
Minnesota		British Indian Ocean Territory	Jersey	Sint Maarten (Dutch)
Mississippi		Bunei Darussalam	Jordan	Slovakia
Missouri		Bulgaria	Kazakhstan	Slovenia
Montana		Burkina Faso	Kenya	Solomon Islands
Nebraska		Burundi	Kiribati	Somalia
		Cambodia	Korea, People's Democratic Republic of	South Africa
		Cameroon	Korea, Republic of	South Georgia and the South Sandwich Islands
		Canada	Kuwait	South Sudan
		Cape Verde	Kyrgyzstan	Spain
		Cayman Islands	Lao People's Democratic Republic	Sri Lanka
		Central African Republic	Latvia	Sudan
		Chad	Lebanon	Suriname
		Chile	Lesotho	Svalbard and Jan Mayen
		China	Liberia	Swaziland
		Chinese Taipei	Liy Arab Jamahiriya	Sweden
		Christmas Island	Liechtenstein	Switzerland
		Cocos (Keeling) Islands	Lithuania	Syrian Arab Republic
		Colombia	Luxembourg	Tajikistan
		Congo	Macao	Tanzania, United Republic of
		Congo, The Democratic Republic of the	Macedonia, The Former Yugoslav Republic of	Thailand
		Cook Islands	Madagascar	Timor Leste
		Costa Rica	Malawi	Togo
		Cote d'Ivoire	Malaysia	Tokelau
		Croatia	Maldives	Tonga
		Cuba	Mali	Trinidad and Tobago
		Curacao	Malta	Tunisia
		Cyprus	Martinique	Turkey
		Czech Republic	Mauritania	Turkmenistan
		Denmark	Mauritius	Turks and Caicos Islands

		Djibouti	Mayotte	Tuvalu
		Dominica	Mexico	Uganda
		Dominican Republic	Moldova, Republic of	Ukraine
		Ecuador	Monaco	United Arab Emirates
		Egypt	Mongolia	United Kingdom
		El Salvador	Montenegro	United States
		Equatorial Guinea	Montserrat	Uruguay
		Eritrea	Morocco	Uzbekistan
		Estonia	Mozambique	Vanuatu
		Ethiopia	Myanmar	Venezuela, Bolivarian Republic of
		Falkland Islands (Malvinas)	Nambia	Viet Nam
		Faroe Islands	Nauru	Virgin Islands, British
		Fiji	Nepal	Wallis and Futuna
		Finland	Netherlands	Western Sahara
		France	New Caledonia	Yemen
		French Guiana	New Zealand	Zambia
		French Polynesia	Nicaragua	Zimbabwe
		French Southern Territories	Niger	
			Nigeria	
			Niue	
			Norfolk Island	
			Norway	

Additional Information

Additional Information data is collected in the API to describe the merchant's business. **Additional Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
MCC	MCC	MCC_API_Field__c	Account	String (Id)	Lookup		100	Yes
Association ID	Association ID	Association_ID__c	Account	String (Id)	Lookup		18	Yes
Partner Branch	Partner Branch	Partner_Branch__c	Account	String (Id)	Lookup		18	No
Association ID (Manual Entry)	Association ID (Manual Entry)	Association_ID__c	Account	String	String		100	No

Yearly Net Revenue	Forecasted Yearly Net Revenue	Yearly_Net_Revenue__c	Opportunity	Decimal	Currency		18	Yes
Account Type	Account Type	Account_Type__c	Opportunity	String	Picklist	<ul style="list-style-type: none"> • New Merchant • Conversion Merchant • Renewal Merchant • Cloned Merchant Deal 	255	No
Change Notes	Change Notes	Change_Notes__c	Opportunity	String	Long Text Area		65535	No

Beneficial Owners

Information about the **Beneficial Owners** for a business is collected in the API. **Beneficial Owners Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
Contact First Name	First Name	FirstName	Contact	String	String		40	Yes
Contact Last Name	Last Name	LastName	Contact	String	String		80	Yes
% Owners hip	% Owned	Percentage_Owned__c	Contact	Double	Percent		16	Yes
Date of Birth	Birthdate	Date_of_Birth__c	Contact	Date	Date			Yes
Street Address	Mailing Street	MailingStreet	Contact	String	TextArea		255	Yes
City	Mailing City	MailingCity	Contact	String	String		40	Yes
State	Mailing State/Province	MailinStateCode	Contact	String	String		80	Yes
Zipcode	Mailing Zip/Postal Code	MailingPostalCode	Contact	String	String		20	Yes
Country	Mailing Country Code	MailingCountryCode	Contact	String	Picklist		10	No

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Social Security Number	SSN	SSN__c	Contact	String	String		9	Yes
Contact Role	Contact Role	Contact_Role__c	Contact	String	Multipicklist	<ul style="list-style-type: none"> Beneficial Owner Control Owner Other 	4099	Yes
Contact Title	Title	Title	Contact	String	String		128	Yes
Email	Email	Email	Contact	String	String		80	Yes
	Primary	Primary__c	Contact	Boolean	Checkbox			Yes
	Beneficial Owner Unique Field	Beneficial_Owner_Unique_Field__c	Contact	Single	Text		20	No

Transaction Payment Options

The **Transaction Payment Options** portion of the API collects information about the merchant's processing history and preferences for processing options with MeS. **Payment Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
Yearly Card Volume	Yearly Card Volume	Yearly_Card_Volume__c	Opportunity	Double	Currency		18	Yes
High Monthly Processing Volumes	High Monthly Volume	High_Monthly_Volume__c	Opportunity	Double	Currency		10	Yes
Average Ticket	Avg Ticket	Avg_Ticket__c	Opportunity	Double	Formula (Currency)		0	Yes
High Ticket	High Ticket	High_Ticket__c	Opportunity	Double	Currency		16	Yes
Visa/MC/Discover Volume	Visa/MC/Discover Volume	Visa_MC_Discover_Volume__c	Opportunity	Double	Currency		16	Yes
American Express Volume	American Express Volume	American_Express_Volume__c	Opportunity	Double	Currency		16	No
Seasonal Months of Operation	Seasonal Months	Seasonal_Months__c	Opportunity	String	Multipicklist	<ul style="list-style-type: none"> Jan Feb Mar Apr 	4099	No

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						<ul style="list-style-type: none"> • May • Jun • Jul • Aug • Sep • Oct • Nov • Dec 		
Mail Order/Tel Order	Card Network Volume % MO/TO (CNP)	Card_Network_Volume_MO_TO_CNP__c	Opportunity	Double	Percent		16	Yes
Internet	Card Network Volume % Internet (CNP)	Card_Network_Volume_Internet_CNP__c	Opportunity	Double	Percent		16	Yes
Swiped	Card Network Volume % Swiped (CP)	Card_Network_Volume_Swiped_CP__c	Opportunity	Double	Percent		16	Yes
Manually Keyed/Mobile	Card Network Volume % Manually K/M (CP)	Card_Network_Volume_Manually_K_M__c	Opportunity	Double	Percent		16	Yes
Customer Type (must add up to 100%)	Customer Type % B2B Sales	Customer_Type_B2B_Sales__c	Opportunity	Double	Percent		16	Yes
Customer Type (must add up to 100%)	Customer Type % B2C Sales	Customer_Type_%_B2c_Sales__c	Opportunity	Double	Percet		16	yes
Refund Policy	Refund Policy	Refund_Policy__c	Opportunity	String	Picklist	<ul style="list-style-type: none"> • Refund in 30 days or Less • No Refunds or Exchanges • Exchanges Only 	255	Yes

						<ul style="list-style-type: none"> • Not Applicable • Credit V/MC/Dis Account • Full Refund • Refund Credit • Refund Merchandise 		
Days to Ship/Deliver	Days to Ship/Deliver	Days_to_Ship_Deliver__c	Opportunity	String	Picklist	<ul style="list-style-type: none"> • Immediate • 1 to 7 • 8 to 14 • 15 to 30 • Over 30 	255	Yes
% Advanced Payments	% Advanced Payments	Advanced_Payments__c	Opportunity	Double	Percent	•	2	No
Visa/Master Card	Visa/Master Card	Visa_MasterCard__c	Opportunity	Boolean	Boolean			No
Discover MeS Settlement	Discover MeS Settlement	Discover_MeS_Settlement__c	Opportunity	Boolean	Boolean			No
American Express (MeS Settlement)	American Express Settlement	American_Express_Settlement_MeS_Settlement__c	Opportunity	Boolean	Boolean			No
Debit with Pin	Debit with Pin	Debit_with_Pin__c	Opportunity	Boolean	Boolean			No
EBT	EBT	EBT__c	Opportunity	Boolean	Boolean			No
Discover Settlement/ Existing SE #	Discover Settlement/ Existing Merchant	Discover_Settlement_Existing__c	Opportunity	String	String		255	No
AmEx Settlement/	AmEx Settlement/	Amex_Settlement_Existing_SE__c	Opportunity	String	String		255	No

Existing SE #	Existing SE #							
ACH Configuration	ACH	ACH__c	Opportunity	Boolean	Boolean			No
FCS#	FCS#	FCS__c	Opportunity	String	String		10	No
Check Authorization	Check Authorization	Check_Authorization__c	Opportunity	Boolean	Boolean			No
Name of Provider	Name of Provider	Name_of_Provider__c	Opportunity	String	String		60	No
Merchant #	Merchant #	Merchant__c	Opportunity	String	String		40	No
Check %	Check %	Check_pct__c	Opportunity	Double	Percent		18	No
Average Dollar Amount per Single Transaction Debit	ACH Debit Avg Dollar Per Tx	ACH_Debit_Avg_Dollar_Per_Tx__c	Opportunity	Double	Currency		16	No
Average Dollar Amount per Single Transaction Credit	ACH Credit Avg Dollar Per Tx	ACH_Credit_Avg_Dollar_Per_Tx__c	Opportunity	Double	Currency		16	No
Maximum Number of Transactions per Day Debit	ACH Debit Max Tx Per Day	ACH_Debit_Max_Tx_Per_Day__c	Opportunity	Double	Double		16	No
Maximum Number of Transactions per Day Credit	ACH Credit Max Tx Per Day	ACH_Credit_Max_Tx_Per_Day__c	Opportunity	Double	Double		16	No
Maximum Dollar Amount per Month Debit	ACH Debit Max Dollar Per Month	ACH_Debit_Max_Dollar_Per_Month__c	Opportunity	Double	Currency		16	No
Maximum Dollar Amount per Month Credit	ACH Credit Max Dollar Per Month	ACH_Credit_Max_Dollar_Per_Month__c	Opportunity	Double	Currency		16	No
Maximum Number of Transactions per Month Debit	ACH Debit Max Tx Per Month	ACH_Debit_Max_Tx_Per_Month__c	Opportunity	Double	Double		18	No

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Maximum Number of Transactions per Month Credit	ACH Credit Max Tx Per Month	ACH_Credit_Max_tx_Per_Month__c	Opportunity	Double	Double		18	No
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Solutions

The **Solutions** portion collects information about the merchant's terminal and the many processing options available. **Solutions Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
POS Terminal	POS Terminals	POS_Terminals__c	Quote Line Items	Boolean	Check box			No
MeS Virtual Terminal	MeS Virtual Terminal	MeS_Virtual_Terminal__c	Quote Line Items	Boolean	Check box			No
Admin Email	Admin Email	Admin_Email__c	Quote Line Items	String	Email			No
Level 3	Level 3	Level_3__c	Quote Line Item	Boolean	Check box			No
Mulit Merchant	Multi Merchant	Multi_Merchant__c	Quote Line Item	Boolean	Check box			No
MeS Virtual Terminal Limited	MeS Virtual Terminal Limited	MeS_Virtual_Terminal_Limited__c	Quote Line Item	Boolean	Check box			No
Administrator Email	Admin Email Limited	Admin_Email_Limited__c	Quote Line Items	String	Email			No
MerhantE Payment Platform	MeS Payment Gateway	MeS_Payment_Gateway__c	Quote Line Item	Boolean	Check box			Yes
URL Address	URL Address	URL_Address__c	Quote Line Item	Boolean	Check box		255	Yes
Name of Certified Shopping Cart	Name of Certified Shopping Cart	Name_of_Certified_Shopping_Cart__c	Quote Line Item	String	Text		255	Yes
Administrator Email	Merchant E Payment Platform Admin Email	Payment_Gateway_Administrator_Email__c	Quote Line Item	String	Email			Yes

Processing Option	Processing Option	Processing_Option__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • MeS Hosted Payment • MeS Card Present and Card Not Present • MeS e-Commerce 		• Yes
MeS Tele Pay	MeS Pay by Phone	MeS_Pay_by_Phone__c	Quote Line Items	Boolean	Check box			No
Other Solution	Other Solution	Other_Solution__c	Quote Line Items	Boolean	Check box			No
Name of Other Solution	Name of Other Solution	Name_of_Other_Solution__c	Quote Line Items	String	Text		255	No
Solution Version #	Solution Version #	Solution_Version__c	Quote Line Items	String	Text		255	No
Name of the digital certificate issuer	Name of the digital certificate issuer	Name_of_the_digital_certificate_issuer__c	Quote Line Items	String	Text		255	No
Digital certificate number(s)	Digital certificate number(s)	Digital_certificate_number_s__c	Quote Line Items	String	Text		255	No
Digital certificate expiration date(s)	Digital certificate expiration date(s)	Digital_certificate_expiration_date_s__c	Quote Line Items	String	Text		255	No
Ownership status of your digital certificate (s)	Digital Certificate Ownership Status	Digital_Certificate_Ownership_Status__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • Individual • Shared 		• No
Terminal Application	Terminal Application	Terminal_Application__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • Retail • Restaurant • Lodging • Cash Advance 		• No
Communication Type	Communication Type	Communication_Type__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • Dial IP • Wireless 		• No
Access Code # to dial out	Access Code # to dial out	Access_Code_to_dial_out__c	Quote Line Items	String	Text		255	No

Auto Batch Close	Auto Batch Close HR	Auto_Batch_Close_HR__c	Quote Line Items	Double	Number		18	No
Auto Batch Close	Auto Batch Close MIN	Auto_Batch_Close_MIN__c	Quote Line Items	Double	Number		18	No
Receipt Header Line 4	Receipt Header Line 4	Receipt_Header_Line_4__c	Quote Line Items	String	Text		255	No
Receipt Header Line 5	Receipt Header Line 5	Receipt_Header_Line_5__c	Quote Line Items	String	Text		255	No
Receipt Footer	Receipt Footer	Receipt_Footer__c	Quote Line Items	String	Text		255	No
AVS On	AVS On	AVS_On__c	Quote Line Items	Boolean	Check box			No
Tip Option On	Tip Option On	Tip_Option_On__c	Quote Line Items	Boolean	Check box			No
Clerk/Server Prompt On	Clerk/Server Prompt On	Clerk_Server_Prompt_On__c	Quote Line Items	Boolean	Check box			No
Phone training for merchant ?	Phone training for merchant ?	Phone_training_for_merchant__c	Quote List Items	String	Picklist	<ul style="list-style-type: none"> • Yes • No 		<ul style="list-style-type: none"> • No
Equipment Shipping Address	Equipment Shipping Address	Equipment_Shipping_Address__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • Merchant Business Address • Legal Address • Other Address 		<ul style="list-style-type: none"> • No
Other Shipping Address	Other Shipping Address	Other_Shipping_Address__c	Quote Line Items	String	Text		255	No
Invoice Prompt On	Invoice Prompt On	Invoice_Prompt_On__c	Quote Line Items	Boolean	Check box			No
Cash Back On	Cash Back On	Cash_Back__c	Quote Line Items	Boolean	Check box			No
Batch Report Type	Batch Report Type	Batch_Report_Type__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • Summary • Batch Detail 		<ul style="list-style-type: none"> • No
ACH Services	ACH Services	ACH_Services__c	Quote Line Items	Boolean	Check box			No

Web Services API	ACH Web API	ACH_Web_API__c	Quote Line Items	Boolean	Check box			No
Fed-Ready/NACHA File Upload	ACH NACHA File	ACH_NACHA_File__c	Quote Line Items	Boolean	Check box			No
Customer Payment Portal (CPP)	ACH CPP	ACH_CPP__c	Quote Line Items	Boolean	Check box			No
ACH Debit	ACH Debit	ACH_Debit__c	Quote Line Items	Boolean	Check box			No
ACH Recurring Debit	ACH Recurring Debit	ACH_Recurring_Debit__c	Quote Line Items	Boolean	Check box			
ACH Credit	ACH Credit	ACH_Credit__c	Quote Line Items	Boolean	Check box			No
ACH Recurring Credit	ACH Recurring Credit	ACH_Recurring_Credit__c	Quote Line Items	Boolean	Check box			No
ACH Refund	ACH Refund	ACH_Refund__c	Quote Line Items	Boolean	Check box			No
Web - Internet Check	ACH Web Check	ACH_Web_Check__c	Quote Line Items	Boolean	Check box			No
TEL - Telephone Check	ACH Tel Check	ACH_Tel_Check__c	Quote Line Items	Boolean	Check box			No
ACH Face Amount: Maximum Number of Re-Presentments	ACH Face Amount: Maximum Re-Presentments	ACH_Max_Re_Presentments__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • 0~ None • 1~ 1 re-presentment • 2~ re-presentments 		• No
Timing of First Re-Presentment	ACH First Re-Presentment	ACH_First_Re_Presentment__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • 0 (Immediately following ACH return) • 1 (1 day following ACH return) • 2 (2 days following 		• No

						ACH return) <ul style="list-style-type: none"> • 3 (3 days following ACH return) • 4 (4 days following ACH return) • 5 (5 days following ACH return) • 6 (6 days following ACH return) • 7 (7 days following ACH return) • 8 (8 days following ACH return) • 9 (9 days following ACH return) • 10 (10 days following ACH return) • 15 (15 days following ACH return) • 20 (20 days following ACH return) • 25 (25 days following ACH return) 		
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						<ul style="list-style-type: none"> • 30 (30 days following ACH return) 		
Timing of Final Re-Representment	ACH Final Re-Representment	ACH_Final_Re_Presentation__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • 0~ Final ACH re-resentation will occur after a fixed number of days • Final ACH re-resentation will coincide with common paydays 		<ul style="list-style-type: none"> • No
ACH Face Amount: Final Re-Representment Days	ACH Face Amount: Final Re-Representment Days	ACH_Final_Re_Presentation_Days__c	Quote Line Items	Decimal	Number	<ul style="list-style-type: none"> • 	18	No
ACH Returned Check Fee: Maximum Re-Representments	ACH Returned Check Fee: Maximum Re-Representments	ACH_RCF_Max_Re_Presentments__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • 0~ None • 1~ • 2~ • 3~ 		<ul style="list-style-type: none"> • No
ACH Returned Check Fee Amount	ACH Returned Check Fee Amount	ACH_RCF_Amount__c	Quote Line Items	Decimal	Currency		10	No
ACH Returned Check Fee Settlement	ACH Returned Check Fee Settlement Account	ACH_RCF_Settlement_Account__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • 0~ Deposit collected fees into Customer's settlement bank account 		<ul style="list-style-type: none"> • No

						<ul style="list-style-type: none"> 1~ Deposit collected fees into Other bank account 		
Would Merchant Like Training from MeS Activations?	MeS Activation Training for Merchant	MeS_Activation_Training_for_Merchant__c	Quote Line Items	Boolean	Check box			No
Product/POS Training	Product/POS Training	Product_Training__c	Quote Line Items	Boolean	Check box			No
PCI Training	PCI Training	PCI_Training__c	Quote Line Items	Boolean	Check box			No
Business Platform Training	Business Platform Training	Business_Platform_Training__c	Quote Line Items	Boolean	Check box			No
Level 3 Training	Level 3 Training	Level_3_Training__c	Quote Line Items	Boolean	Check box			No
Additional information (optional)	Additional Info	Additional_Info_Training__c	Quote Line Items	String	Long Text Area		130768	No
Authorization Host	Authorization Host	Authorization_Host__c	Quote List Items	String	Picklist	<ul style="list-style-type: none"> Sierra Summit Transit/MultiPass 		No
	Authorization Host-other	Authorization_Host_other__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> Sierra Summit Transit/MultiPass 		No
Customer Rate (not to exceed 3.5%)	Customer Rate (not to exceed 3.5%)	Customer_Rate_not_to_exceed_3_50__c	Quote Line Items	Double	Percent		(2, 2)	No
Surcharge	Surcharge	Surcharge__c	Quote Line Items	Boolean	Check box			No
Surcharge Fee	Surcharge Fee	Surcharge_Fee__c	Quote Line Items	Boolean	Check box			No
Merchant E Invoice	Merchant E Invoice	MerchantE_Invoice__c	Quote Line Items	Boolean	Check box			No
Merchant E Invoice Administrator Email	Merchant E Invoice Admin Email	MerchantE_Invoice_Admin_Email__c	Quote Line Items	String	Email			No

Merchant E Invoice Link	Merchant E Invoice Link	MerchantE_Invoice_Link__c	Quote Line Items	Boolean	Check box			No
Merchant E Invoice Link Administrator Email	Merchant E Invoice Link Email	MerchantE_Invoice_Link_Email__c	Quote Line Items	String	Email			No
Hosted Payments	Hosted Payments	HostedPayments__c	Quote Line Items	Boolean	Check box			No
Hosted Payments Administrator Email	Hosted Payments Admin Email	HostedPayAdminEmail__c	Quote Line Items	String	Email			No
Interchange Optimization	Interchange Optimization	Interchange_Optimization__c	Quote Line Items	Boolean	Check box			No
Interchange Optimization Administrator Email	Interchange Optimization Email	Interchange_Optimization_Email__c	Quote Line Items	String	Email			No
Money OUT Services	MeS Financial Services	MeS_Financial_Services__c	Quote Line Items	Boolean	Check box			No

Fees

The API collects information about the **Fees** and rates the merchant will be billed as part of their processing agreement. **Fee Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
BET Table	BET Table	BET_Table_ID_API_Field__c	Quote Line Items	String	Lookup		255	Yes
Acceptance Options	V/MC Acceptance Options	V_MC_Acceptance_Options__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> Credit/Business Cards Debit/Prepaid Cards Both 		No

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Visa MasterCard - Authorization Fee	V/MC Authoriz ation Fee	V_MC_Authorization_Fee__c	Quo te Line Ite ms	Doub le	Curren cy		10	No
V/MC Diff. Plus	V/MC Diff. Plus Plan	V_MC_Diff_Plus_Plan__c	Quo te Line Ite ms	Bool ean	Checkb ox			No
V/MC Diff. Plus Percent age	V/MC Diff. Plus Percent age	V_MC_Diff_Plus_Percentage__c	Quo te Line Ite ms	Doub le	Percen t		2	No
V/MC Diff. Plus Credit Qualified Per Item	V/MC Diff. Plus Credit Qualified Per Item	V_MC_Diff_Plus_Credit_Qualified _Per_Item__c	Quo te Line Ite ms	Doub le	Curren cy		10	No
V/MC Diff. Plus Credit Qualified Rate	V/MC Diff. Plus Credit Qualified Rate	V_MC_Diff_Plus_Credit_Qualified _Rate__c	Quo te Line Ite ms	Doub le	Percen t		2	No
V/MC Diff. Plus Debit Qualified Per Item	V/MC Diff. Plus Debit Qualified Per Item	V_MC_Diff_Plus_Debit_Qualified _Per_Item__c	Quo te Line Ite ms	Doub le	Curren cy		10	No
V/MC Diff. Plus Debit Qualified Rate	V/MC Diff. Plus Debit Qualified Rate	V_MC_Diff_Plus_Debit_Qualified _Rate__c	Quo te Line Ite ms	Doub le	Percen t		2	No
V/MC Tiered	V/MC Tiered Plan	V_MC_Tiered_Plan__c	Quo te Line Ite ms	Bool ean	Checkb ox			No
V/MC Commer cial Qualified - \$ Per Item	V/MC Tiered Commer cial Qualified Per Item	V_MC_Tiered_Commercial_Quali fied_Per_Item__c	Quo te Line Ite ms	Doub le	Curren cy		10	No

V/MC Commercial Qualified - Rate %	V/MC Tiered Commercial Qualified Rate	V_MC_Tiered_Commercial_Qualified_Rate__c	Quote Line Items	Double	Percent		2	No
V/MC Tiered Debit Qualified Per Item	V/MC Tiered Debit Qualified Per Item	V_MC_Tiered_Debit_Qualified_Per_Item__c	Quote Line Items	Double	Currency		10	No
V/MC Tiered Debit Qualified Rate	V/MC Tiered Debit Qualified Rate	V_MC_Tiered_Debit_Qualified_Rate__c	Quote Line Items	Double	Percent		2	No
V/MC Tiered Mid Qual Per Item	V/MC Tiered Mid Qual Per Item	V_MC_Tiered_Mid_Qual_Per_Item__c	Quote Line Items	Double	Currency		10	No
V/MC Tiered Mid Qual Rate	V/MC Tiered Mid Qual Rate	V_MC_Tiered_Mid_Qual_Rate__c	Quote Line Items	Double	Percent		2	No
V/MC Tiered Non Qual Per Item	V/MC Tiered Non Qual Per Item	V_MC_Tiered_Non_Qual_Per_Item__c	Quote Line Items	Double	Currency		10	No
V/MC Tiered Non Qual Rate	V/MC Tiered Non Qual Rate	V_MC_Tiered_Non_Qual_Rate__c	Quote Line Items	Double	Percent		2	No
V/MC Tiered Rewards Rate	V/MC Tiered Rewards Rate	V_MC_Tiered_Rewards_Rate__c	Quote Line Items	Double	Percent		2	No
V/MC Tiered Rewards Rate Per Item	V/MC Tiered Rewards Rate Per Item	V_MC_Tiered_Rewards_Rate_Per_Item__c	Quote Line Items	Double	Currency		10	No
V/MC - Pass Through Per Item	V/MC Pass Through Per Item	V_MC_Pass_Through_Per_Item__c	Quote Line Items	Double	Currency		10	No

V/MC - Pass Through	V/MC Pass Through Plan	V_MC_Pass_Through_Plan__c	Quote Line Items	Boolean	Checkbox			No
V/MC - Pass Through Rate	V/MC Pass Through Rate	V_MC_Pass_Through_Rate__c	Quote Line Items	Double	Percent		2	No
Amex - Authorization Fee	Amex Authorization Fee	Amex_Authorization_Fee__c	Quote Line Items	Double	Currency		10	No
Amex - Bundled Plan	Amex Bundled Plan	Amex_Tired_Plan__c	Quote Line Items	Boolean	Checkbox			No
Amex Pass Through \$	Amex Pass Through Per Item	Amex_Pass_Through_Per_Item__c	Quote Line Items	Double	Currency		10	No
Amex Pass Through %	Amex Pass Through Rate	Amex_Pass_Through_Rate__c	Quote Line Items	Double	Percent		2	No
Amex - Bundled \$	Amex Bundled Per Item	Amex_Tier_3_Per_Item__c	Quote Line Items	Double	Currency		10	No
Amex - Bundled %	Amex Bundled Rate	Amex_Tier_3_Rate__c	Quote Line Items	Double	Percent		2	No
Pin Debit - Authorization Fee	Pin Debit Authorization Fee	Pin_Debit_Authorization_Fee__c	Quote Line Items	Double	Currency		10	No
Pin Debit - Pass Through	Pin Debit Pass Through Plan	Pin_Debit_Pass_Through_Plan__c	Quote Line Items	Boolean	Checkbox			No

Pin Debit - Pass Through - Rate	Pin Debit Pass Through Rate		Quote Line Items	Double	Currency		2	No
Pin Debit - Pass Through - Per Item	Pin Debit Pass Through Per Item	Pin_Debit_Pass_Through_Per_Item__c	Quote Line Items	Double	Currency		10	No
ARU	ARU	ARU__c	Quote Line Items	Double	Currency		10	No
Operator Assisted	Operator Assisted	Operator_Assisted__c	Quote Line Items	Double	Currency		10	No
AVS	AVS	AVS__c	Quote Line Items	Double	Currency		10	No
Bank Referral	Bank Referral	Bank_Referral__c	Quote Line Items	Double	Currency		10	No
JCB/CUP	JCB/CUP	JCB_CUP__c	Quote Line Items	Double	Currency		10	No
EBT	EBT	EBT__c	Quote Line Items	Double	Currency		10	No
Other - \$	Other Authorization Fee: Other Fee Amt1	Other_Authorization_Fee_Other_Fee_Amt1__c	Quote Line Items	Double	Currency		10	No
Other - \$	Other Authorization	Other_Authorization_Fee_Other_Fee_Amt2	Quote Line	Double	Currency		10	2

	Fee: Other Fee Amt2		Item					
Other	Other Authoriz ation Fee: Other Fee Name	Other_Authorization_Other_Fee_ Name__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • PayFlow Pro • MeS Payment Gateway 	•	No
Other	Other Authoriz ation Fee: Other Fee Name2	Other_Authorization_Fee_Other_ Fee_Name2__c	Quote Line Items	String	Text		255	No
Account Applicati on	Account Applicati on	Account_Application__c	Quote Line Items	Double	Currency		10	No
New Account Setup	New Account Setup	New_Account_Setup__c	Quote Line Items	Double	Currency		10	No
Account Updater 2	One Time Account Updater	One_Time_Account_Updater__c	Quote Line Items	Double	Currency		10	No
Wireless Setup	Wireless Setup	Wireless_Setup__c	Quote Line Items	Double	Currency		10	No
One Time Fees: Other Fee Amount 1	One Time Fees: Other Fee Amount 1	One_Time_Fees_Other_Fees_A mount_1__c	Quote Line Items	Double	Currency		10	No
One Time Fees: Other Fee	One Time Fees: Other Fee	One_Time_Fees_Amount_2__c	Quote Line Items	Double	Currency		10	No

Amount 2	Amount 2							
Other	One Time Fees: Other Fee Name 1	One_Time_Fee_Other_Fee_Name_1__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • USAe Pay Setup • PayFlow Pro Setup • PayFlow Link Setup • MeS VT Setup • MeS Limited Setup • MeS Payment Gateway setup • Swipe Simple Setup 		• No
Other	One Time Fees: Other Fee Name 2	One_Time_Fees_Other_Fee_Name_2__c	Quote Line Items	String	Text		255	No
Minimum Discount	Minimum Discount	Minimum_Discount__c	Quote Line Items	Double	Currency		10	No
Chargeback Fee	Chargeback Fee	Chargeback_Fee__c	Quote Line Items	Double	Currency		10	No
Return NSF	Return NSF	Return_NSF__c	Quote Line Items	Double	Currency		10	No

Batch Fee	Batch Fee	Batch_Fee__c	Quote Line Items	Double	Currency		10	No
Internet Per Trans	Internet Per Trans	Internet_Per_Trans__c	Quote Line Items	Double	Currency		10	No
Per Occurrence - Account Updater	Per Occurrence Account Updater	Per_Occurrence_Account_Updater__c	Quote Line Items	Double	Currency		10	No
Yearly Admin	Yearly Admin	Yearly_Admin__c	Quote Line Items	Double	Currency		10	No
Yearly Payment Platform	Yearly Payment Gateway	Yearly_Payment_Gateway__c	Quote Line Items	Double	Currency		10	No
Per Occurrence - Other2	Per Occurrence: Other Fee Amount 1	Per_Occurrence_Other_Fee_Amount_1__c	Quote Line Items	Double	Currency		10	No
Per Occurrence - Other2	Per Occurrence: Other Fee Amount 2	Per_Occurrence_Other_Fee_Amount_2__c	Quote Line Items	Double	Currency		10	No
Other	Per Occurrence: Other Fee Name 1	Per_Occurrence_Other_Fee_Name_1__c	Quote Line Items	String	Text		255	No
Other	Per Occurrence: Other Fee Name 2	Per_Occurrence_Other_Fee_Name_2__c	Quote Line Items	String	Text		255	No

Statement Fee	Statement Fee	Statement_Fee__c	Quote Line Items	Double	Currency		10	No
Business Hub-Account Service Monthly Fee	Business Hub-Account Service Monthly Fee	Business_Hub_Account_Service_Monthly_Fee__c	Quote Line Items	Double	Currency		16	No
Electronic Statement	Electronic Statement	Electronic_Statement__c	Quote Line Items	Boolean	Checkbox			No
Paper Statement	Paper Statement	Paper_Statement__c	Quote Line Items	Boolean	Checkbox			No
PCI Admin Monthly 2	PCI Admin Monthly	PCI_Admin_Monthly__c	Quote Line Items	Double	Currency		10	No
PCI Late Validation 2	PCI Late Validation	PCI_Late_Validation__c	Quote Line Items	Double	Currency		10	No
Wireless Fees	Wireless Fees	Wireless_Fees__c	Quote Line Items	Double	Currency		10	No
Hosted Payments	Hosted payments fee	Hosted_payments_fee__c	Quote Line Items	Double	Currency		10	No
MerchantE Invoice Fee	MerchantE Invoice Monthly Fee	MerchantE_Invoice_Monthly_Fee__c	Quote Line Items	Double	Currency		16	No
MerchantE Invoice Link Fee	MerchantE Invoice Link Fee	MerchantE_Invoice_Link_Fee__c	Quote Line Items	Double	Currency		10	No

Monthly Fees - Other2	Monthly Fees: Other Fee Amount 1	Monthly_Fees_Other_Fee_Amount_1__c	Quote Line Items	Double	Currency		10	No
Monthly Fees - Other2	Monthly Fees: Other Fee Amount 2	Monthly_Fees_Other_Fee_Amount_2__c	Quote Line Items	Double	Currency		10	No
Monthly Fees - Other2	Monthly Fees: Other Fee Amount 3	Monthly_Fees_Other_Fee_Amount_3__c	Quote Line Items	Double	Currency		10	No
Monthly Fees - Other2	Monthly Fees: Other Fee Amount 4	Monthly_Fees_Other_Fee_Amount_4__c	Quote Line Items	Double	Currency		10	No
Other - \$	Monthly Fees: Other Fee Amount 5	Monthly_Fees_Other_Fee_Amount_5__c	Quote Line Items	Double	Currency		10	No
Other - \$	Monthly Fees: Other Fee Amount 6	Monthly_Fees_Other_Fee_Amount_6__c	Quote Line Items	Double	Currency		10	No
Other	Monthly Fees: Other Fee Name 1	Monthly_Fees_Other_Fee_Name_1__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • USAe Pay Monthly • PayFlow Pro Monthly • PayFlow Link Monthly 		No

						<ul style="list-style-type: none"> • Swipe Simple Monthly • Solution Platform • EmployeePlus Payouts • Pre-Imbursements • Interchange Optimization • MerchantE Invoice 		
Other	Monthly Fees: Other Fee Name 2	Monthly_Fees_Other_Fee_Name_2_c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • USAe Pay Monthly • PayFlow Pro Monthly • PayFlow Link Monthly • Swipe Simple Monthly • Solution Platform • EmployeePlus 		No

						<ul style="list-style-type: none"> • Payouts • Pre-Imbursements • Interchange Optimization • MerchantE Invoice 		
Other	Monthly Fees: Other Fee Name 3	Monthly_Fees_Other_Fee_Name_3__c	Quote Line Items	String	Text		255	No
Other	Monthly Fees: Other Fee Name 4	Monthly_Fees_Other_Fee_Name_4__c	Quote Line Items	String	Text		255	No
Other	Monthly Fees: Other Fee Name 5	Monthly_Fees_Other_Fee_Name_5__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • USAe Pay Monthly • PayFlow Pro Monthly • PayFlow Link Monthly • Swipe Simple Monthly • Solution Platform • EmployeePlus Payouts 		No

						<ul style="list-style-type: none"> • Pre-Imbursements • Interchange Optimization • MerchantE Invoice 		
Other	Monthly Fees: Other Fee Name 6	Monthly_Fees_Other_Fee_Name_6__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> • USAe Pay Monthly • PayFlow Pro Monthly • PayFlow Link Monthly • Swipe Simple Monthly • Solution Platform • EmployeePlus Payouts • Pre-Imbursements • Interchange Optimization • MerchantE Invoice 	• No	

Surcharge Amount (\$)	Surcharge Amount	Surcharge_Amount__c	Quote Line Items	Double	Currency		16	No
Transaction Fee	ACH Transaction Fee Amount	ACH_Transaction_Fee_Amount__c	Quote Line Items	Double	Currency		10	No
Transaction Fee %	ACH Transaction Fee %	ACH_Transaction_Fee__c	Quote Line Items	Double	Percent		2	No
Monthly Service Fee	ACH Monthly Service Fee	ACH_Monthly_Service_Fee__c	Quote Line Items	Double	Currency		10	No
Return/ Re-presentment Fee	ACH Return/ Re-presentment Fee	ACH_Return_Re_presentation_Fee__c	Quote Line Items	Double			10	No
Unauthorized Return/ Re-presentment with State Fee	ACH Unauthorized Return State Fee	ACH_Unauthorized_Return_State_Fee__c	Quote Line Items	Double			10	No
SmartPay Express Monthly Fee	ACH SmartPay Express Setup Fee	ACH_SmartPay_Express_Setup_Fee__c	Quote Line Items	Double			10	No
SmartPay Express Monthly Fee	ACH SmartPay Express Monthly Fee	ACH_SmartPay_Express_Monthly_Fee__c	Quote Line Items	Double			10	No
Hosted Pay Monthly Fee	ACH Hosted Pay	ACH_Hosted_Pay_Monthly_Fee__c	Quote Line	Double			10	No

	Monthly Fee		Items					
Gross Settlement Fee	Gross Settlement Fee	Gross_Settlement_Fee__c	Quote Line Items	Double			2	No
ACH Additional Location Monthly Fee	ACH Additional Location Monthly Fee	ACH_Additional_Location_Monthly_Fee__c	Quote Line Items	Double				No
ACH Additional Bank Account Monthly Fee	ACH Additional Bank Account Monthly Fee	ACH_Additional_Bk_Account_Monthly_Fee__c	Quote Line Items	Double				No

Equipment

The **Equipment** section of the API collects information about the type of equipment the merchant is using at their location. **Equipment Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
Rent, Buy, or Own	Equipment Rent/Buy/Own	Equipment_Rent_Buy_Own__c	Quote Line Items	String	Picklist	<ul style="list-style-type: none"> Rent Buy Own 	•	No
Per Item (\$)	Equipment Per Item	Equipment_Per_Item__c	Quote Line Items	Double	Currency		10	No
Quantity	Equipment Quantity	Equipment_Quantity__c	Quote Line Items	Integer	Number		18	No
# Months	Equipment # Months	Equipment_Months__c	Quote Line Items	Integer	Number		18	No
Merchant Application Notes	Merchant Application Notes	Merchant_Application_Notes__c	Opportunity	String	Text Area		255	Yes
	Product Name	Product_Name__c	Quote Line Items	String	Text		200	Yes

	Equipment Unique Field	Equipment_Unique_Field__c	Quote Line Items	String	Text		20	No
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Backend

This **Backend** section contains fields that are not shown on the Salesforce UI/Merchant Application. These are all used for Salesforce logic or automation. **Backend Fields**

Custom UI Field Name	Salesforce Field Label	Salesforce Field API Name	Object	Data Type	Salesforce Data Type	Picklist Values	Length	Required
	Need Pricing Exemption Approval	Need_Pricing_Exemption__Approval__c	Opportunity	Boolean	Checkbox			No
	Stage	StageName	Opportunity	String	Picklist	<ul style="list-style-type: none"> Prospecting Needs Analysis Value Proposition Mgmt Review Quote Sent Pending Signature Discovery Proposal Sent Contract Negotiation Contract Signed Implementation Initial Pricing / Credit Review Manager Approval Pending Underwriting Approved MID Closed Won Closed Lost Parked Providing Contract Decision Makers Id. Decision Makers Perception Analysis Legal Review Pending Contract Closed Lost-Credit Decline Closed Lost-No Application 		No

						<ul style="list-style-type: none"> • Opportunity Won • Qualification • Prospecting - 10% • Needs Analysis -25% • Initial Pricing / Credit Review - 40% • Manager Approval - 45% • Closed Won - 100% • Closed Lost - 0% • Closed Lost-Credit Decline - 0% • Parked - 15% • Needs Analysis - 25% • Mgmt Review - 40% • Prospecting - 10 • Needs Analysis - 25 • Manager Approval - 45 • Closed Won - 100 • Closed Lost - 0 • Parked - 15 		
	Auto Submission to Underwriting	Auto_Submission_to_Underwriting__c		Boolean	Checkbox			No
	Opportunity Record Type	RecordTypeId	Opportunity	String	Picklist	<ul style="list-style-type: none"> • Cross_Sell - 0122T000000kwYzQAI • New_Direct_Merchant_Opportunity - 01234000000QEUSAA4 • New_Partner_Merchant - 01234000000M77hAAC • New_Partner_Opportunity - 01234000000HqAGAA0 • Read_Only_New_Partner_Merchant - 0123x000001WMxcAAG 		No

						<ul style="list-style-type: none">Renewal - 0122T000000ca5 QQAQ		
--	--	--	--	--	--	---	--	--

API Validation Rules

The API performs a set of validation rules applied to any request received. **Note:** If any validation errors occur, the entire request is rejected and no information is saved. See the table below for validation rules and the errors returned in the response. **Account Rules**

Object	Type	Error	Validation Level
Account	Name field is empty	Upsert failed. First exception on row 0; first error: REQUIRED_FIELD_MISSING, Required fields are missing: [Name]: [Name]	Standard
Account	Phone field should be 10 digits	Upsert failed. First exception on row 0; first error: FIELD_CUSTOM_VALIDATION_EXCEPTION, Phone/Fax number must be a 10-digit number or in (999) 999-9999 format.: []	Standard
Account	Fax field should be 10 digits	Upsert failed. First exception on row 0; first error: FIELD_CUSTOM_VALIDATION_EXCEPTION, Phone/Fax number must be a 10-digit number or in (999) 999-9999 format.: []	Standard
Account	Legal Zipcode field should be 5 digits	"Legal Address Zipcode: Enter Valid Legal Address Zipcode"	Standard
Account	DBA Address Zipcode field should be 5 digits	"DBA Address Zipcode: Enter valid DBA Address Zipcode"	Standard
Account	Mailing Zipcode should be 5 digits	"Mailing Address Zipcode: Enter valid Mailing Address Zipcode"	Standard
Account	App Email format should be valid email format	"Enter valid Email Address"	Standard
Account	Federal Tax ID field should be 9 digits	"Federal Tax ID: Enter valid Federal Tax ID"	Standard
Account	Legal Entity Type(Ownership) on Account should have a value when trying to create contacts/ Beneficial Owners.	"In order to add a Beneficial Owner you must select an Entity Type on the Merchant Information page"	Code
Account	Invalid Association ID	[-Entered value-] Association ID not found.	Code
Account	Invalid MCC	[-Entered value-] MCC not found	Code
Account	Invalid NAICS Category	[-Entered value-] NAICS Category not found	Code
Account	Invalid NAICS Sub-Category	[-Entered value-] NAICS Sub Category not found	Code
Account	Legal Name field is required (field type is Name)	"Legal Name: Enter valid Legal Name"	Standard
Account	Sponsorship field is required (field type is Picklist)	"Sponsorship is required"	Standard

Business Checking Account Rules

Object	Type	Error	Validation Level
Business Checking Account	DDA Type is Empty	Upsert failed. First exception on row 1; first error: REQUIRED_FIELD_MISSING, Required fields are missing: [DDA_Type_c]	Standard

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Business Checking Account	Duplicate DDA Type Values (Not more than one Fee, Deposit and Chargeback DDA Type are allowed per Application)	"Message": "Only one Deposit Type account is allowed., Only one Chargeback Type account is allowed., Only one Fee Type account is allowed."	Code
Business Checking Account	Transit Routing Number should be of 9-digits	Upsert failed. First exception on row 0; first error: FIELD_CUSTOM_VALIDATION_EXCEPTION, Please enter a valid 9 digit number.: [Transit_Routing_c]"	Standard

Contact Rules

Object	Type	Error	Validation Level
Contact	SSN should be 9-digits	Upsert failed. First exception on row 1; first error: STRING_TOO_LONG, SSN: data value too large: *** encrypted text *** (max length=9): [SSN_c]	Standard
Contact	Only one Control Prong is allowed per Merchant Application.	Only one Control Prong Contact Roles allowed.	Code
Contact	Only one Authorized Signer is allowed per Merchant Application.	Only one Authorized Signer is allowed.	Code
Contact	Maximum of 4 Principals are allowed per Merchant Application.	Maximum 4.Principals are allowed.	Code
Contact	Only one Principal is allowed for a Sole Proprietorship	"Only 1 Principal allowed for Sole Proprietorship"	Standard
Contact	% Ownership is mandatory if the Contact Role has Principal in it.	% Owned: Principal owner must own 25% or more of the merchant	Code
Contact	% Ownership should have minimum of 25% when Principal was selected in Contact Role.	% Owned: Principal owner must own 25% or more of the merchant	Code
Contact	Sum of % Ownership for all the Contacts should not cross 100% (for Contacts with Contact Role as Principal).	Sum of % Owned should not be greater than 100%	Code
Contact	% Owned is not allowed for Non-Principal Contact Role.	% Owned is not allowed for Non-Principal Contact Role.	Code
Contact	Contact required fields based on Ownership field on Account	Required fields missing. (Refer sheet2 for the required contact field list based on Ownership field in Account.)	Code
Contact	Contact Role field is required (field type is Picklist)	"Contact Role is required"	Standard

Opportunity Rules

Object	Type	Error	Validation Level
Opportunity	4 fields under "Card Acceptance Method" should sum up to 100% or can be left empty.	Card network volume fields must add up to 100%	Standard
Opportunity	2 fields under "Customer Type" should sum up to 100% or can be left empty.	Customer Type fields must add up to 100%.	Standard
Opportunity	Account Type field is required (field type is Picklist)	"Account Type is required"	Standard
Opportunity	RecordTypeId is required as Direct Merchant (field type is RecordType)	"RecordTypeId is required as Direct Merchant"	Standard

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Quote Line Item Rules

Object	Type	Error	Validation Level
Quote Line Items	Business_Hub_Account_Service_Monthly_Fee__c must be set to NULL, or to either 0 or 29.95	"The monthly Business Hub-Account Service Monthly fee must be \$29.95 or \$0.00."	Standard
Quote Line Items	Only one field can be selected out of the below 3 fields in Quote Line Item/Fee Schedule Object. <ul style="list-style-type: none"> V/MC Diff Plus Plan v/MC Tiered Plan V/MC Pass Through Plan 	Only One Fee schedule plan is allowed under Visa/Mastercard/Discover.	Standard
Quote Line Items	Only one checkbox can be selected out of the below 2 fields in Quote Line Item Object. <ul style="list-style-type: none"> Amex Bundled Plan Amex Pass Through Plan 	Only One Fee schedule plan is allowed under American Express	Standard
Quote Line Items	If V/MC Diff. Plus Plan is checked, only the following list of fields can be submitted: <ul style="list-style-type: none"> V/MC Diff Plus Percentage V/MC Diff Plus Credit Qualified Per Item V/MC Diff Plus Credit Qualified Rate V/MC Diff Plus Debit Qualified Per Item V/MC Diff Plus Debit Qualified Rate 	You cannot enter values in Visa/Mastercard/Discover Pass Through Plan fields and Visa/Mastercard/Discover Tiered Plan fields when Visa/Mastercard/Discover Diff Plus Plan is selected.	Standard
Quote Line Items	If V/MC Pass Through Plan is checked, only the following list of fields can be submitted: <ul style="list-style-type: none"> V/MC Pass Through Per Item V/MC Pass Through Rate 	You cannot enter values in Visa/Mastercard/Discover Diff Plus Plan fields and Visa/Mastercard/Discover Tiered Plan fields when Visa/Mastercard/Discover Pass Through Plan is selected.	Standard
Quote Line Items	If V/MC Tiered Plan is checked, only the following list of fields can be submitted: <ul style="list-style-type: none"> V/MC Tiered Commercial Qual Per Item V/MC Tiered Commercial Qual Rate V/MC Tiered Credit Qualified Per Item V/MC Tiered Credit Qualified Rate V/MC Tiered Debit Qualified Per Item V/MC Tiered Debit Qualified Rate V/MC Tiered Mid Qual Per Item V/MC Tiered Mid Qual Rate V/MC Tiered Non Qual Per Item V/MC Tiered Non Qual Rate V/MC Tiered Rewards Rate 	You cannot enter values in Visa/Mastercard/Discover Diff Plus Plan fields and Visa/Mastercard/Discover Pass Through Plan fields when Visa/Mastercard/Discover Tiered Plan is selected.	Standard

	<ul style="list-style-type: none"> V/MC Tiered Rewards Per Item 		
Quote Line Items	<p>If Amex Pass Through Plan is checked, only the following list of fields can be submitted:</p> <ul style="list-style-type: none"> Amex Pass Through Per Item Amex Pass Through Rate 	You cannot enter values in American Express Bundled Plan fields when American Express Pass Through Plan is selected.	Standard
Quote Line Items	<p>If Amex Bundled Plan is checked, only the following list of fields can be submitted:</p> <ul style="list-style-type: none"> Amex Bundled Per Item Amex Bundled Rate 	You cannot enter values in American Express Pass Through Plan fields when American Express Bundled Plan is selected.	Standard

Note: If a field exceeds the maximum length, the value will be truncated. Fields included: Legal City, DBA City, Physical Address City, Legal Street, DBA Street, Physical Address Street, Legal Name, Account Name.