

MerchantE Partner to Portal API Specification

March 2024



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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", |

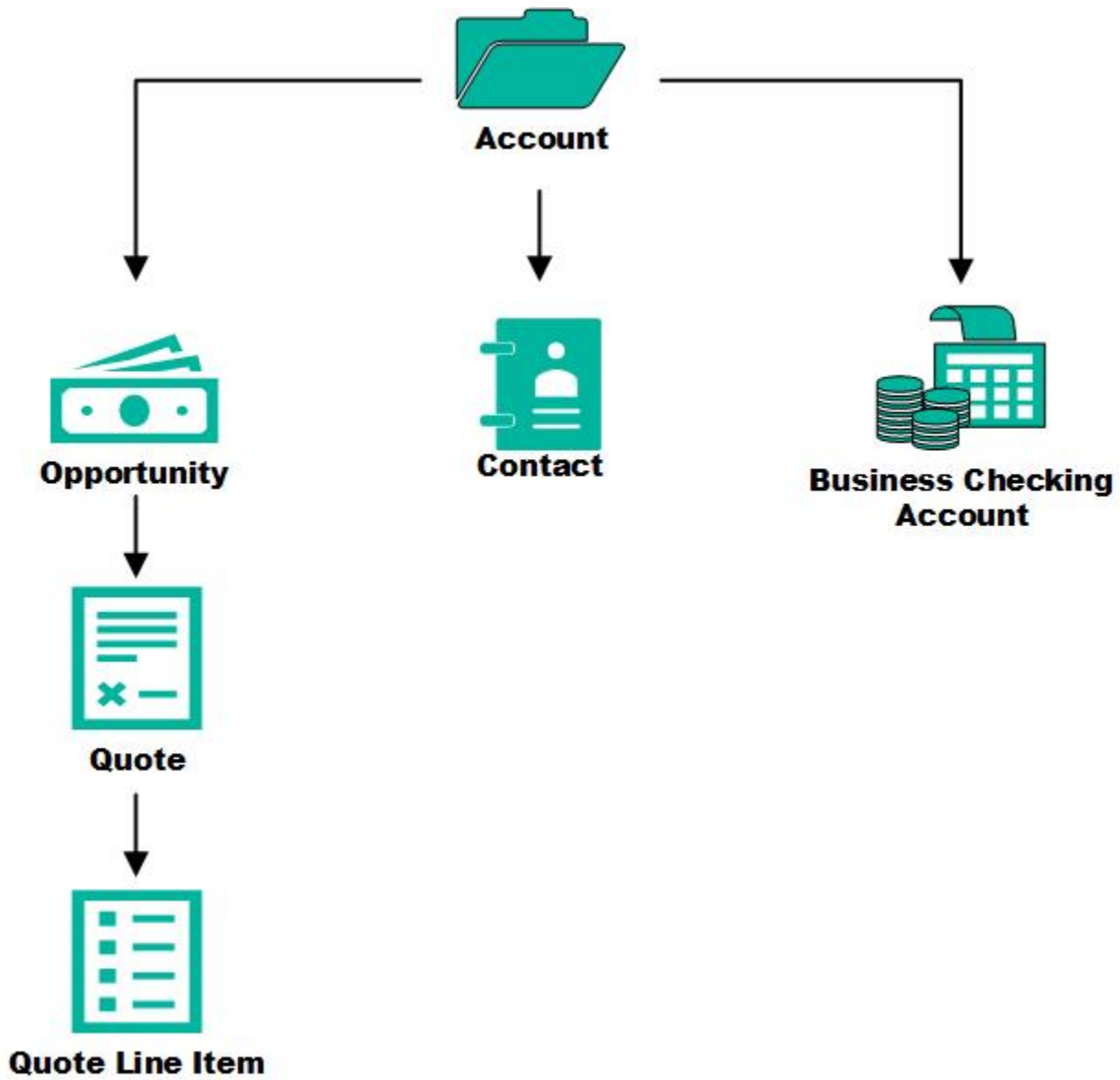
| | | |
|---------------|-----|---|
| | | <ul style="list-style-type: none"> • “MerchantE_Invoice__c”: true, • In the Example Request and Response section added the following line to the Update Request JSON structure: <ul style="list-style-type: none"> • “MerchantE_Invoice__c”: true, • In the Merchant 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": "a3h18000000blAWAAY",
    "ObjectType": "Business Checking Account",
    "Message": "Business Checking Account Created Successfully."
  },
  "Success": true, "SourceId": "222",
  "SFid": "a3h18000000blAXAAY",
  "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_Addtional_Location_Monthly_Fee__c":5,
"ACH_Addtional_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 |
|---|-----------------------------|--------------------------------|-------------|--------|--------|--|----|----|

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) | | |
|--|--|--|--|--|--|--|--|--|

| | | | | | | | | |
|---|---|-----------------------------------|------------------|---------|----------|---|----|------|
| | | | | | | <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 | | • 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 | • | 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~ | | • 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 | | • 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 |
|--|------------------------|---------------------------|------------------|--------|------|--|----|----|

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.