Client Information	
Profile	
Client DBA:	
Test Account ID:	
Include on all transactions Converge Vendor ID:	
Test TID:	
Partner App Id:	
Address:	
Phone:	
Email:	
Merchant Contact Info	
Name:	
Phone:	
Email:	
Product	
Product Name:	
Version:	
Vendor Notes:	
Product Contact	
Name:	
Phone:	
Email:	
Product Visibility:	
If Restricted, state restrictions:	

Integration Method					
Hosted Payment Page		Comments:	Will this be used to tokenize for XML?	Yes	No
Lightbox		Comments:	Will this be used to tokenize for XML?	Yes	No
Checkout.js		Comments:	Will this be used to tokenize for XML?	Yes	No
Hosted Invoice Page		Comments:	Billing & Invoicing API Support		
XML API					
Card Present					
Card Not Present					
Card on File (Stored Token)					

Region		
United States		
Canada		
Market Segment		
Ecommerce		
Moto		
Retail		
Service		
Billing & Invoicing Segment		
Billing & Invoicing		
Hospitality		
Transaction Types		
Basic		
ccsale		
ccvoid		Erase a transaction in the current batch
cccredit		Standalone refund - not advised
ccreturn		Linked refund - preferred
ccauthonly		Guarantees that funds are available on the card
ccdelete		Required to void CCAUTHONLY
cccomplete		Converts authorization to sale
ccverify		Verifies CVVand AVS data
ccbalinquiry		Verifies balance on pre-paid credit cards
ccgettoken		Standalone token request
ccupdatetip		Add/modify/reset tip (service only)
ccsignature		Add signature image to approved transaction Signature capture must be GIF, TIF, JPG, PNG format
Recurring		
ccaddrecurring		Add a new recurring record
ccupdaterecurring		Revise an existing recurring record
ccdeleterecurring		Remove an existing recurring record
ccrecurringsale		Submit an off-cycle payment
Installment		
ccaddinstall		Add a new installment record
ccupdateinstall		Revise an existing installment record
ccdeleteinstall		Remove an existing recurring record
ccinstallsale		Submit an off-cycle payment

Debit		
dbpurchase		Requires card and PIN capture through CSDK
dbreturn		Requires card and PIN capture through CSDK
dbbainquiry		Requires card and PIN capture through CSDK
pldpurchase		Requires card and PIN capture through CSDK
dbvoid		Requires card and PIN capture through CSDK
binlookup		Requires card and PIN capture through CSDK
EBT		
fspurchase		Requires card and PIN capture through CSDK
fsreturn		Requires card and PIN capture through CSDK
fsbainquiry		Requires card and PIN capture through CSDK
fsforcepurchase		
fsforcereturn		
cbpurchase		Requires card and PIN capture through CSDK
cbbainquiry		Requires card and PIN capture through CSDK
Electronic Check/ACH		
ecspurchase		
ecsvoid		
ecsaddrecurring		
ecsupdaterecurring		
ecsdeleterecurring		
ecsrecurringsale		
ecsaddinstall		
ecsupdateinstall		
ecsdeleteinstall		
ecsinstallsale		
Gift		
egcactivation		
egcsale		
egccardrefund		
egcreload		
egcbalinquiry		
egccredit		
egcgettoken		

Loyalty		
ltenrollment		
ltredeem		
ltreturn		
ltaddpoints		
ltinquiry		
ltleadinquiry		
ltmemberinquiry		
ltvoid		
ltdelete		
Card Manager		
ccquerytoken		Can only be performed through XML API
ccupdatetoken		Can only be performed through XML API
ccdeletetoken		Can only be performed through XML API
End of Day Transactions		
txnemail		
txnquery		Required field
total		
settle		
Batch Import		
ccimport		
cctokenimport		
ccrecimport		
Admin Transactions		
terminalsetup		
fieldsetup		
printersetup		
Billing & Invoicing		
create invoice		
cancel invoice		
partial payments		Support to allow cardholder to pay invoice in multiple payments

Services and Data		
Services		
DCC		**Currency conversion**
MCC		**Currency conversion**
Account Updater		
Tokenization		
Card Manager		
Dynamic DBA		
Payment Facilitator Support		
Export Scripts		
Level 3 Data		**See below for Level III Paymnt fields**
Product Catalog		
Email Receipts		**Recommended**
3D Secure		
Address Verification		**Required for ecommerce and MOTO**
CVV2 Verification		**Required for ecommerce and MOTO**
Encryption		**Only used with Ingenico or MagTek encrypted devices**
Healthcare (Autosubstantiation)		
Service Fees		
Surcharges		
Wallets		
Apple Pay In App		
Apple Pay on the Web		
Paypal Express Check out		
PayPal Credit		
Visa Checkout		
MasterPass		
Payment Fields		
Customer Names		
Street address		**Recommended for Address Verification**
City		**Recommended for Address Verification**
State		**Recommended for Address Verification**
Zip		**Required for Address Verification**
Country		
Email		**Recommended for Receipts**
Invoice		**Required for eCommerce / MOTO**
Description		
Merchant Txn ID		

		Level 3 Payment Fields
ssl_customer_code		Required for level III
ssl_salestax		Required for level III
ssl_salestax_indicator		Y required for level III Interchange qualification
ssl_invoice_number		Required for level III
ssl_level3_indicator		Required for level III
ssl_ship_to_zip		If invoice is shipped, this is required
ssl_ship_to_country		If invoice is shipped, this is required
ssl_shipping_amount		If invoice is shipped, this is required
ssl_ship_from_postal_code		If invoice is shipped, this is required
ssl_discount_amount		
ssl_duty_amount		Cross-border shipments will require a duty amount
ssl_national_tax_indicator		Tax must be included and non-zero to get level III Interchange qualifications
ssl_national_tax_amount		Tax must be included and non-zero to get level III Interchange qualifications
ssl_order_date		Interchange level III qualification requirement
ssl_other_tax		
ssl_summary_commodity_code		Used to indicate if Level III data is in the line item detail for shipping
ssl_merchant_vat_number		
ssl_customer_vat_number		
ssl_freight_tax_amount		
ssl_vat_invoice_number		
ssl_tracking_number		If invoice is shipped, this is required
ssl_shipping_company		If invoice is shipped, this is required
ssl_other_fees		
ssl_line_item_description		Interchange level III qualification requirement
ssl_line_Item_product_code		Interchange level III qualification requirement
ssl_line_Item_commodity_code		Interchange level III qualification requirement
ssl_line_Item_quantity		Interchange level III qualification requirement
ssl_line_Item_unit_of_measure		Interchange level III qualification requirement
ssl_line_Item_unit_cost		Interchange level III qualification requirement
ssl_line_Item_discount_indicator		Interchange level III qualification requirement
ssl_line_Item_tax_indicator		Interchange level III qualification requirement
ssl_line_item_discount_amount		Interchange level III qualification requirement. If a discount is applied to the unit cost, then this field should be zero filled. Visa specific
ssl_line_Item_tax_rate		Interchange level III qualification requirement
ssl_line_Item_tax_amount		Interchange level III qualification requirement
ssl_line_Item_tax_type		Interchange level III qualification requirement

ssl_line_Item_extended_total		The total cost of the line item for the detail record calculated as: Quantity * Unit Price = Extended Item Amount Mastercard specific
ssl_line_Item_total		Interchange level III qualification requirement. Formula = (Unit Cost x Qty) – Discount Per Line Item. Visa specific
ssl_line_Item_alternative_tax		

Additional Notes

Vendor/Partner signature

Solution Engineer Signature

Certification Analyst Signature