

Partner/Merchant Profile Sheet

Updated: 10/5/2020

General Information					
Partner Name:			ISO I.D.:		
Merchant Name:			Merchant ID:		
Sales Rep:			CRM.:		
Address:			City:		State: Zip:
Year established:			Business Structure:		
Create Date:			Integration Date:		
Number of Employees:					
Company Overview:					
Website:					
Description of Products/Services Sold:					
Relationship Type:					
Products used:	<input type="checkbox"/> ACH	<input type="checkbox"/> CC	<input type="checkbox"/> Verify	<input type="checkbox"/> Gateway	<input type="checkbox"/> Bill Pay <input type="checkbox"/> IVR
Product Interest:	<input type="checkbox"/> ACH	<input type="checkbox"/> CC	<input type="checkbox"/> Verify	<input type="checkbox"/> Gateway	<input type="checkbox"/> Bill Pay <input type="checkbox"/> IVR
Billing Model:					
Exceptions:					
Agreement:					
Contract Term/Expiration:					
Application Submission Source:			Rate Plan Created	<input type="checkbox"/>	
Systems used:			Underwriting Contact:	<input type="checkbox"/>	
Pricing Structure:	<input type="checkbox"/> CFEE <input type="checkbox"/> Absorb <input type="checkbox"/> Tiered <input type="checkbox"/> Flat <input type="checkbox"/> Interchange plus				
Approvals Received:	<input type="checkbox"/> CFEE/Manual Bill/Split Bill <input type="checkbox"/> 3-way splits <input type="checkbox"/> Hold Days <input type="checkbox"/> Rev. Model/Pricing				
Vertical Created:					
Additional Associated MIDs:					

Notes/Comments

Integrated Software Vendors

Product Name:	
Integration Method(s):	<input type="checkbox"/> REST <input type="checkbox"/> SOAP/AGI <input type="checkbox"/> Forte CO <input type="checkbox"/> Forte.JS <input type="checkbox"/> SWP OTHER:
<i>Features:</i>	<input type="checkbox"/> ACH <input type="checkbox"/> CC <input type="checkbox"/> Void/Refund/Reverse <input type="checkbox"/> Reporting <input type="checkbox"/> Returns/Rejects
<i>Features cont.:</i>	<input type="checkbox"/> Schedules <input type="checkbox"/> Tokens <input type="checkbox"/> Disputes <input type="checkbox"/> Verify
Credentials Entered By:	
Transaction Environment:	<input type="checkbox"/> Merchant (ex. VT) <input type="checkbox"/> Ecommerce <input type="checkbox"/> MOTO/IVR <input type="checkbox"/> Card Present
Merchant Reporting Tool:	<input type="checkbox"/> Dex <input type="checkbox"/> ISV Software <input type="checkbox"/> FTP
Transmitter I.D.	

Gateway Partner

Gateway Services:	<input type="checkbox"/> ACH Only <input type="checkbox"/> CC Only <input type="checkbox"/> CC & ACH
Current Gateway Provider:	
How long has solution been offered?	
Type of partnership with Gateway provider:	
What does gateway provider handle?	
Interest in leaving current gateway provider:	
If yes, explain:	
Using Forte Solution:	

Notes/Comments

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