PayTrace Custom Product List Guide

The goal of Visa's new Commercial Enhanced Data Program (CEDP) is to improve the quality of the data that is submitted to qualify B2B and B2G transactions for discounted processing rates. As your B2B payment experts, we are committed to continuing to help you submit quality transaction data that helps qualify for the best possible rates under the new program.
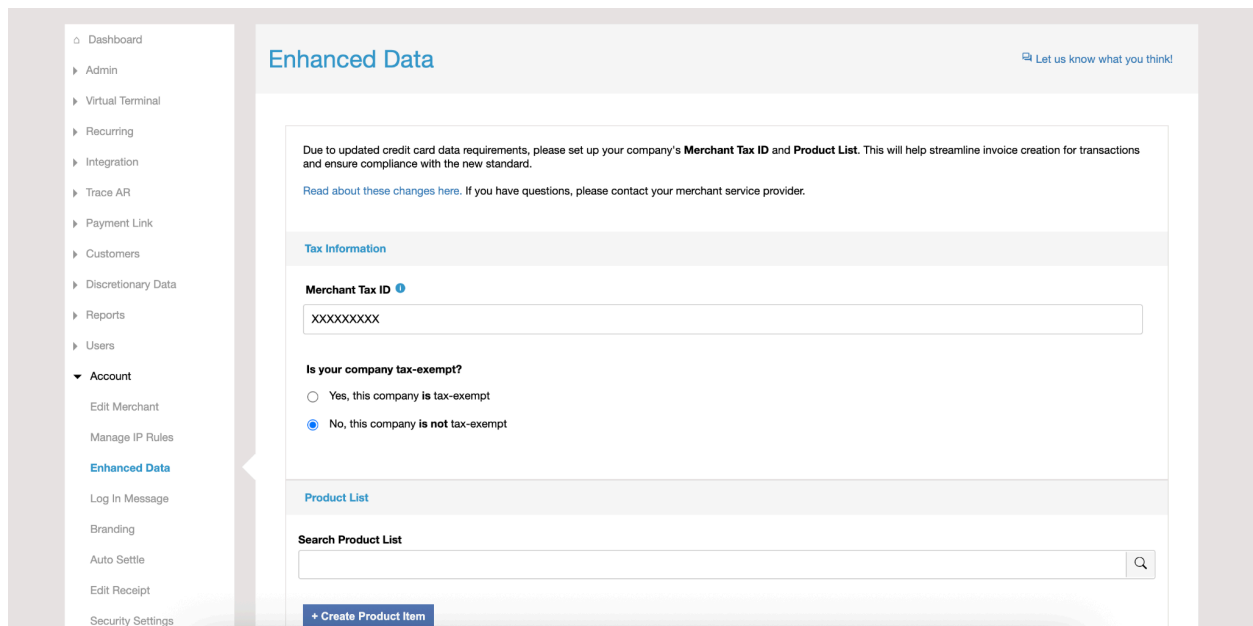
To help meet the new CEDP requirements, we are introducing our new PayTrace Product List feature, which will allow you to enter your full catalog of products. These custom product lists will help to submit detailed enhanced data with each transaction, and will allow Visa to verify that the information being submitted is accurate and of good quality.

This guide is your go-to resource for helping you set up your custom product lists in the Virtual Terminal.

Creating a Custom Product List

1. Log into the Virtual Terminal at https://paytrace.com/login.pay
2. Click "Account" in the menu on the left
3. Select "Enhanced Data"

The Enhanced Data page is separated into two sections, Tax Information and Product List.

Tax Information

The Tax Information section contains two tax-related fields: your Tax ID and tax-exempt status.

![PayTrace logo]

Tax Information

Merchant Tax ID ⓘ

XXXXXXXX

Is your company tax-exempt?

○ Yes, this company **is** tax-exempt

● No, this company **is not** tax-exempt

- Enter or update your Tax ID. If correct, leave as-is.
- Indicate whether or not your business is tax-exempt.

Note: If your previous default local tax rate was set to 0 in your L2/L3 default data, this value will default to "Yes this company is tax exempt." Otherwise, it will default to "No this company is not tax exempt."

Product List

The Product List section is where you can create and manage a list of your custom products.

Search Custom Product List

[   ] 🔍

+ Create Product Item

Priority ⓘ	Product Label	Product Code	Commodity Code ⓘ	Unit of Measure	Cost per Unit	
⠿ 1	ladder	4567ladder	3950	each	$120.00	⋮
⠿ 2	Product01	Product01	00001	Each	$100.00	⋮
⠿ 3	Extension Cord	5678cord	3960	each	$55.00	⋮
⠿ 4	Paint Can	1234paint	9610	gallon	$120.00	⋮
⠿ 5	Garden Hose	6789hose	3065	each	$55.00	⋮
⠿ 6	Paint Brush	2345brush	9640	each	$8.00	⋮
⠿ 7	Nails	3456nails	9811	box	$16.00	⋮

+ Create Product Item

Save Enhanced Data

Create Product

Click "Create Product Item" to create a new product to add to your list.

Add New Product

Product Label ⓘ*

Product Code ⓘ*   Commodity Code ⓘ*

Unit of Measure ⓘ*   Cost Per Unit ⓘ*
                                                   $0.00

[Save Product Item]   [Cancel]

In the "Add New Product" window, you can type in the name/label of your product, as well as the product code, commodity code, unit of measure, and cost per unit.

- **Product Label** - The product label should describe the product referenced in this line item record. This value should be unique.
- **Product Code** - The product code should be the identifier of this product within your accounting or product management system.
- **Commodity Code** - The commodity code should be the international description code of the overall goods or services being supplied.
- **Unit of Measure** - This is the unit of measure (i.e., gallons, pounds, liters, ounces, etc.) that is used to quantity each number/count in the quantity value.
- **Cost Per Unit** - The unit cost is the cost per quantity of the product/service referenced in this line item record.

Once you click "Save Product Item," the new product gets added at the bottom of the product list with the lowest priority number.

Search Functionality

The Search Product List area allows you to search for any product in your custom product list.

Product List

Search Product List

paint

[+ Create Product Item]

Priority ⓘ	Product Label	Product Code	Commodity Code ⓘ	Unit of Measure	Cost per Unit	
⠿ 1	Paint Can	1234paint	9610	gallon	$120.00	⋮
⠿ 2	Paint Brush	2345brush	9640	each	$8.00	⋮

Type into the search box and click the magnifying glass or press enter to see your search results.

Note: The search functionality will search all fields of a product item. If you type in "ga," your results will include lines where the product label is "garbage bags" and also where the unit of measure is "gallons."

Edit/Delete a Product

Click the 3-dot menu on the right side of any product line item to edit or delete an existing product.

Priority ⓘ	Product Label	Product Code	Commodity Code ⓘ	Unit of Measure	Cost per Unit	
⠿ 1	ladder	4567ladder	3950	each	$120.00	⋮
⠿ 2	Product01	Product01	00001	Each	$100.00	⋮
⠿ 3	Extension Cord	5678cord	3960	each	$55.00	⋮
⠿ 4	Paint Can	1234paint	9610	gallon	$120.00	⋮
⠿ 5	Garden Hose	6789hose	3065	each	$55.00	✏ Edit
⠿ 6	Paint Brush	2345brush	9640	each	$8.00	🗑 Delete
⠿ 7	Nails	3456nails	9811	box	$16.00	⋮

If you choose to delete a product item, you will be asked to confirm if you'd like to delete. Once confirmed, the product will be removed.

Edit Existing Product
Select "Edit" to open that product's editable fields.

Edit Product

Product Label ⓘ *

    Paint Can

Product Code ⓘ *   Commodity Code ⓘ *

    1234paint   9610

Unit of Measure ⓘ *   Cost Per Unit ⓘ *

    gallon   120

Save Product Item   Cancel

Click "Save Product Item" to save the changes made to the product.

Product Priority

The product list feature allows you to sort your products by priority. Your most frequently purchased items should be at the top of the list, ranging down to your least frequently purchased items.

Priority ⓘ	Product Label	Product Code	Commodity Code ⓘ	Unit of Measure	Cost per Unit	
⠿ 1	ladder	4567ladder	3950	each	$120.00	⋮
⠿ 2	Paint Can	1234paint	9610	gallon	$120.00	⋮
⠿ 5	Product01	Product01	00001	Each	$100.00	⋮
⠿ 3	Extension Cord	5678cord	3960	each	$55.00	⋮
⠿ 4	Paint Brush	2345brush	9640	each	$8.00	⋮
⠿ 6	Garden Hose	6789hose	3065	each	$55.00	⋮
⠿ 7	Nails	3456nails	9811	box	$16.00	⋮

You can select, and then drag a product up or down to create a new priority order for your products. Once a product has been moved, the priority number of that item will update accordingly.

Saving Your Product List

After entering tax information and adding products to your product list, click the "Save Enhanced Data" button to ensure that all of your changes are saved.

⠿ 5	Extension Cord	5678cord	3960	each	$55.00	⋮

+ Create Product Item

Save Enhanced Data

Questions?

If you have any questions about creating your custom product lists or CEDP, please contact customer support at support@paytrace.com.