State / Province / Region Setup

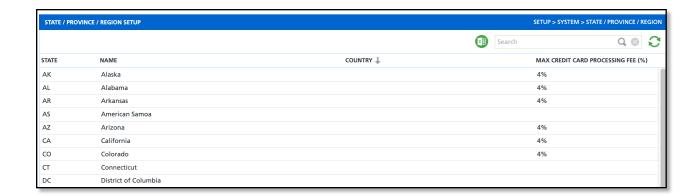
Last Modified on 07/24/2025 11:38 am PDT

Pathway: Setup > System > State / Province / Region

The State / Province / Region Setup screen allows for the configuration of a maximum credit card processing fee (%) by location. Settings in Account Class Setup determine whether a fee is applied and whether it's a fixed amount or percentage. At the account level, individual accounts can be excluded from credit card processing fees entirely, regardless of the account class settings. All applied fees will be capped based on the maximum defined for the corresponding state, province, or region.



Setting the Max Credit Card Processing Fee to '0' **effectively caps max processing at 0%** for that state, province or region. To disable the fee for a specific state, province, or region, **leave the field blank.**



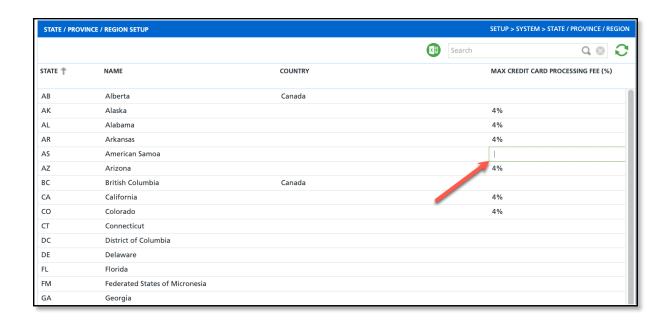
Permission

The following permission is required to add or edit a max credit card processing fee:

Permission ID	Permission Name
120	Setup\System and Security

Add/Remove Maximum Fee

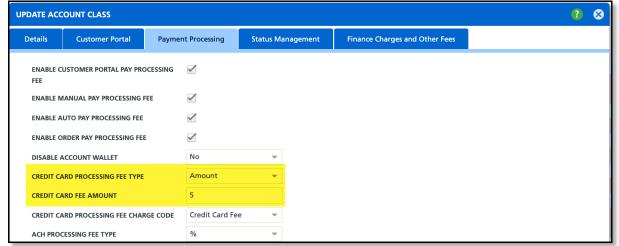
To set or update a maximum fee, enter a value in the Max Credit Card Processing Fee (%) field. To remove or disable the fee, clear the field and leave it blank.



Account Class

Pathway: Setup > Account > Account Class

In the **Payment Processing** tab of Add/Update Account Class, users can configure a credit card processing fee as a fixed amount or percentage at the account class level. If defined, the fee will be capped by the maximum set for the corresponding state, province, or region.



Edit Account

Pathway: Customer Service Screen (Accounts) > [right-click] Account Details

At the account level, you can exclude individual accounts from credit card payment processing fees entirely by checking the **"Exclude from Payment Processing Fee"** check box in Edit Account.

