

Shift4 Ownership Change	Department	Pipeline
	Document No. & Version	1.9.3
	Last Updated	July 30, 2026

Overview

Ownership / entity changes for an existing Shift4 Dine merchant typically fall into **four** buckets:

- **Ownership Change (new MID assigned)**
- **Legal Name Change (same MID)**
- **Service Transfer Agreement (same MID)**
- **New Authorized Signer (same corp, same MID)**

Official references (when in doubt):

- Shift4 Legal hub (current PDFs): <https://www.shift4.com/legal>
- Merchant Processing Agreement (terms + fees):
<https://www.shift4.com/pdf/Merchant-Processing-Agreement-Terms-and-Conditions-20231201.pdf?refresh=20250605>

Key contacts (from partner ownership-change guide)

- Relaunch: relaunch@shift4.com
- Underwriting: UWgroup@shift4.com
- UW support submissions (Authorized Signer form): uwsupport@shift4.com

Quick decision guide (which path do we use?)

1) Ownership Change (new MID assigned)



Use when the business is being sold / fully transferred and the **new owner has their own EIN and banking**, and the concept/menu may change.

2) Legal Name Change (same MID)

Use when it is the **same location and they are keeping the same POS system**, but the business identity changes (e.g., concept / EIN changes).

3) Service Transfer Agreement (same MID)

Use when **only the responsible party on the contract changes**, and **EIN, banking, and everything else stays the same**.

4) New Authorized Signer (same corp, same MID)

Use when **only the owner / authorized signer changes** and the **corporation info remains the same** (no new MID required).

 **Important:** These are process notes based on partner guidance (Jan 2026). For edge cases, use the official Shift4 terms and confirm with Shift4.

Ownership Change (new MID assigned) — step-by-step

When to use

- Ownership change is usually preferable to creating a new order/new MID when the business remains in the same space and largely the same operation but ownership/legal entity changes.
- If everything changes (owner and DBA), a new MID may be required through Partner Portal.

Key rules:

- The portal should show an **“ownership change”** designation on the new MID.



- **Contract term:** partner guide indicates the new owner signs a **new contract** and is typically placed on a **36-month term**. (This may conflict with older guidance that “term does not reset” — when in doubt, confirm with Shift4 / the contract terms.)
- The **original merchant may continue being billed** until the new MID starts processing.

Sales Center fields to pay attention to (partner guide)

- If the merchant is taking over the prior owner’s equipment, **UNCHECK:**
 - **POS Required?** → **NO**
 - **Standalone equipment and Mobile Software Required?** → **NO**
- Additional equipment can be added in Partner Portal after the new MID is created.

Bonus retraction policy

- If ownership change happens within 12 months of payout, bonuses may be retracted and paid to the new owner.
- After 12 months, no retraction occurs.

Re-Launch process (detailed steps)

⚠ **Re-Launch only handles ownership changes where the account has PO fees on it (Shift4 Dine, Hospitality). DO NOT attempt to complete the ownership change without Re-Launch.**

- **Step 1:** Sales Partner submits an ownership change via Sales Center. The new MID needs to be **tagged as an ownership change** and have the **previous MID attached**.
- **Step 2:** New MID must be in **status 600**.
 - **Status 100** → needs more time.
 - **Status 425** → account is on hold; the merchant needs to contact **UWgroup@shift4.com**.
- **Step 3:** Re-Launch creates the order when the MID reaches **600**.
- **Step 4:** The equipment from the order needs to **board to the Shift4 gateway on the new MID** (takes **24–48 hours**).
- **Step 5:** Re-Launch reaches out to the owner to schedule the **final appointment**.
 - Remote appointment where we remote into the POS system and configure it with the new owner’s information (**tax ID, EIN, bank account, etc.**).



- Pin pads are tested to ensure funds are directed to the new owner's account.
- Appointment must take place **while the business is closed**.
- Takes about **1 hour per POS**, with a **minimum 2-hour** block to allow for troubleshooting.
- **Only AFTER that appointment will the Ownership Change be truly complete.**

Timeline: The entire OC process can take anywhere from **3–5 business days to 2+ weeks**, depending on gateway boarding, any holds on the account, and the merchant's responsiveness to holds and Re-Launch's scheduling calls/emails.

Legal Name Change (same MID)

What happens

- Same location, keeping the same MID and POS system.
- Requires a **legal name change form** (request from Shift4 relationship management).

Notes

- No new MID is created.

Step-by-step process

1. Complete the legal name change form

- Ensure all areas of the form are filled out completely. It sounds basic, but it's easy to miss something that will hold the process up.

2. Send DocuSign to merchant

- Underwriting requires the **Certificate of Completion**, which is the initial DocuSign page proving that the merchant actually signed the document.

3. Call Merchant Relations for software transfer



- Once the form is approved, call **Merchant Relations** to have them send an email to the merchant.
- This email prompts the merchant to schedule a time for the software to be transferred from the old MID to the new MID (even if all equipment remains the same).
- These appointments get booked quickly, so request that Merchant Relations also send the email to you so you can fill out the request for the merchant to ensure they get the first available time.
- **The transfer needs to take place when the business is closed.**
- They say it can take up to 2 hours, but in practice it typically takes about 15 minutes.
- Someone needs to be at the restaurant to click "Accept" for the change to take place.

4. Bank account changes (if applicable)

- If the merchant is changing bank accounts **in addition to** the legal name:
 - While still on the phone after the transfer is complete, have Merchant Relations transfer you to the **Risk Department**.
 - Request that any funds from the old account be transferred to the new MID.
 - **Important:** Double and triple check with the Risk Department that the bank account info is changing to avoid funds being transferred to the wrong account.

5. Escalation and support

- If there are questions throughout the process about what's holding it up, call **Merchant Relations** (not just Customer Service).
- They can escalate and communicate with the appropriate internal parties.
- There's often a lack of clarity about what the actual steps are and how long this takes.
- Responses from Underwriting aren't always immediate, which can make the process take longer than it should, especially if the rep isn't following up daily.

Service Transfer Agreement (same MID)

What happens

- Only the contract-liable party changes.
- EIN, banking, and everything else remains the same.



Notes

- No new MID is created.

New Authorized Signer (same corp, same MID)

What happens

- Corporation info remains the same; **no new MID required**.
- Complete the **New Authorized Signer form** in Partner Portal:
 - Marketing Materials → Paperwork, Policy & Procedures → Merchant Paperwork
- Once completed, email to uwsupport@shift4.com

Hardware changes (best practices)

Best practice

- **Negotiate and settle hardware changes before the transfer** when possible.

If hardware changes are needed after the transfer

- Complete the ownership/entity change first.
- Then follow the normal add/remove process:
 - Remove hardware: accessory cancel form + RMA / return labels
 - Add hardware: standard add-on ordering flow (Lighthouse where possible, otherwise paperwork)

Escalation / support pointers

- If the merchant is trying to cancel instead of transferring ownership, remember: **the merchant must call Shift4 Customer Service directly to cancel**.



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- Ownership changes take time and should be treated like regular orders (not instant-turnaround).



Change Log

Date	Description of Change	Comments	Initiated By
May 15, 2026	SkyTab/SkyTab POS into Shift4 Dine Lighthouse Business Manager into Shift4 Customer Hub		Hyah Takiang
June 25, 2026	Ownershift Change Guidelines Update		Ryan Raymundo
July 30, 2026	Added Re-Launch Process		Ryan Raymundo

