



# Forte/Dex API Credential Setup with Managely

May 2024

**MANAGELY®**

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## Introduction

This document is designed to help new Managely customers work through the Forte/Dex API Credential setup when integrating with Managely. At the end of this documented process, newly integrated Managely accounts should be able to process credit card transactions directly to customer accounts. A prerequisite to this process is administrative access to active Managely and Forte/Dex accounts.

## Submit Forte/Dex Application

1. Log into Managely as the dealer.
2. Browse to Settings > Utilities > eCheck / Credit Card.

**eCheck / Credit Card**


[New Forte Merchant Account](#) [Dex Documentation](#) [Forte PCI Compliance](#)

[+ Add Forte Authorization](#) [Export to Excel](#)

Organization ID	Location ID	API Access ID	API Secure Key	Sandbox	Default
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1 - 1 of 1 items [Refresh](#)

3. If the dealer does not have a Forte/Dex account, click the **New Forte Merchant Account** button. This opens a browser page to csgforte.



## Let's Get Started

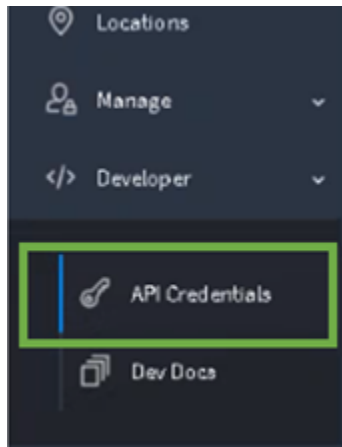
Tell us a little about your business so we can better serve you.

<b>Business Name</b> <input type="text" value="DBA Name (Doing Business As)"/> <small>Name that should appear on your customer's statements.</small>	<b>Legal Name</b> <input type="text" value="ABC Company, LLC"/> <small>Legal name of your business – Must match Tax ID Number</small>	
<b>Business Ownership Type</b> <input type="text" value="Please select"/>	<b>Tax ID Number</b> <input type="text" value="TIN, EIN, SSN, etc."/> <small>Tax Identification Number for your business</small>	
<b>Street Address</b> <input type="text" value="Street Address"/> <small>Physical address of your business –No P.O. Boxes or Paid Address (i.e UPS Stores)please.</small>		
<b>Postal Code</b> <input type="text"/>	<b>City</b> <input type="text"/>	<b>State / Province</b> <input type="text"/>
<b>Customer Service Number</b> <input type="text" value="(###) ### ####"/>	<b>Business Website</b> <input type="text" value="www.forte.net"/>	
<b>Business Category</b> <input type="text" value="Please select"/>	<b>Type of Business</b> <input type="text"/>	
<b>Intended Use</b> <input type="text" value="Sales"/>	<b>Most Transactions Via</b> <input type="text" value="Internet"/>	

4. Complete the csgforte page and submit the application. When the application is approved, the dealer can log into the Forte/Dex Customer Portal.

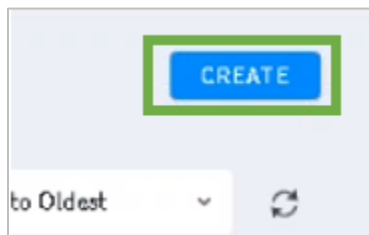
## Create Forte/Dex API Credentials

1. Login to the Forte/Dex Customer Portal at this URL: <https://console.forte.net/login>
2. Select the Developer drop-down menu, select API Credentials:



3. At the API Credentials page, click **Create** in the upper right-hand corner.

**Note: The API Credentials page may contain existing Forte Application data.**



4. Provide a friendly name to identify the API Credentials that will be created.

5. Click **Create New API Key**:

The screenshot shows the 'Create API Credentials' page. At the top left is a '< Back' link. Below it is the title 'Create API Credentials' and a paragraph: 'To get started with Forte's REST APIs begin by entering a name. Then, click the 'Create' button to generate your new API Access ID and API Secure Key.' The form has two fields: 'Name' and 'Roles'. The 'Name' field is a text input with a placeholder 'Name' and is highlighted with a green rectangle. The 'Roles' field shows a selected role 'Roles: Api\_User' with a blue icon. At the bottom right, there is a blue button labeled 'CREATE NEW API KEY' and a grey button labeled 'BACK'. The 'CREATE NEW API KEY' button is highlighted with a green rectangle.

6. Wait until the **API Access ID** and the **API Secure Key** are displayed. Record these credentials securely. There is a **Copy** function shown under the credentials to expedite later entry.

The screenshot shows the 'Create API Credentials' page after the credentials have been generated. The title 'Create API Credentials' and the introductory paragraph are still present. The 'Name' field now displays 'API Credential Friendly Name'. The 'API Access ID' field displays 'API Access ID' with a blue 'Copy' link below it. The 'API Secure Key' field displays 'API Secure Key' with a blue 'Copy' link below it.

## Input API Credentials, Organization ID, and Location ID into Managely

1. Login to the Managely account intended for use with the newly created API Credentials.
2. Browse to Setup > Utilities > eCheck/Credit Card.
3. On the eCheck/Credit Card page, click the **Add Forte Authorization** button to open the Forte Merchant Account form:

The screenshot displays the 'eCheck / Credit Card' page in the Managely system. A red box highlights the '+ Add Forte Authorization' button. A red arrow points from this button to a modal window titled 'Forte Merchant Account'. The modal contains the following fields: 'Organization ID' (with a red asterisk), 'Location ID' (with a red asterisk), 'API Access ID' (with a red asterisk), and 'API Secure Key' (with a red asterisk). Each field has a corresponding input box. Below these fields is a 'Sandbox' toggle switch, currently set to 'NO'. At the bottom of the modal are 'Save' and 'Cancel' buttons. The background shows a table with columns for Organization ID, Location ID, API Access ID, API Secure Key, Sandbox, and Default. The table is currently empty, and the status bar at the bottom indicates '1 - 1 of 1 items' and a 'Refresh' button.

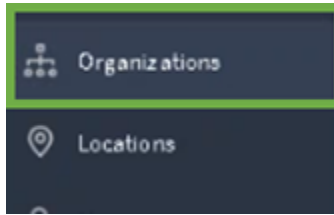
4. In the **API Access ID** and the **API Secure Key** fields, input the API credentials recorded earlier from the Forte Create API Keys page.

**Note:** It is also possible to use the Copy function to expedite inputting these credentials.

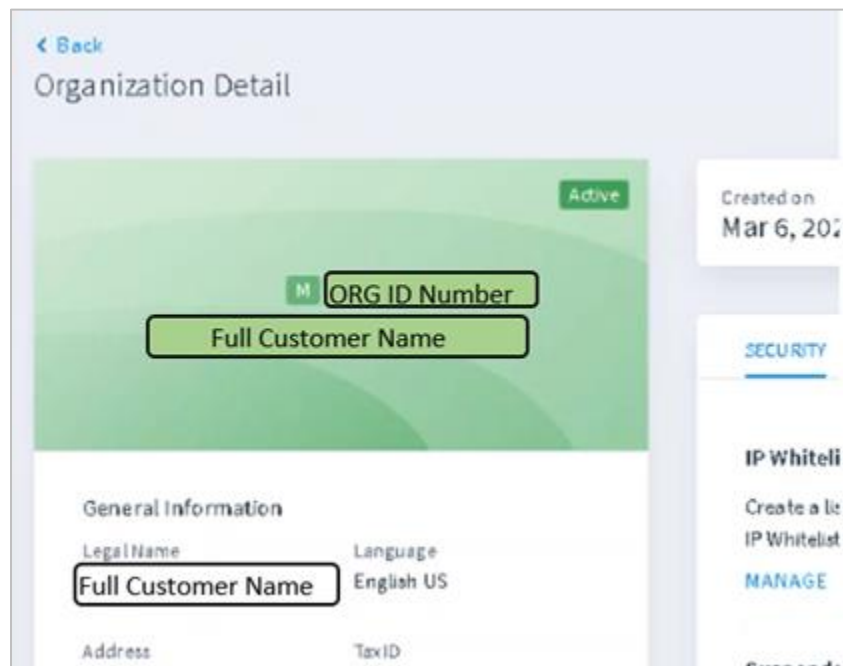
**Note:** The Sandbox switch is for using the Managely/Forte integration in a test environment that does not submit transactions for payment.

5. Login to Forte/Dex console again if not already logged in.

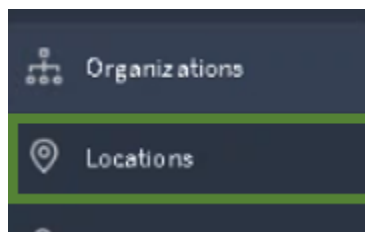
- Click the **Organizations** button on the left-hand tool bar:



- Wait until this page lists the associated Organization(s).
- Click **Legal Name** to display the Organization details:



- Copy the 6 Digit Organization ID Number into the **Organization ID** field in Managely.
- In Forte/Dex, select the Locations tab from the left-hand tool bar:



- Wait for the Organizations Location Details to be displayed.



12. Select the appropriate Address to display location details:

Location Detail

Live

Location ID: Location ID #

Transmitter ID: Transmit. ID #

Full Customer Name

General Information

Created on Phone

13. Copy the 6-digit Location ID Number into the **Location ID** field in Managely.
14. Verify the information submitted into the four fields in Managely.
15. Wait for the information to save.
16. When the API Secure Key is connected correctly it will display as a row of dots.
17. If the dots are shown, the Forte/Dex Merchant account setup is complete.
18. In Managely, on the Forte Merchant Account form, click **Save**.

If you require further assistance with this process, please contact your Managely Project Manager for additional support.