Forte/Dex API Credential Setup with Managely

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MANAGELY®

Contents

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.

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.
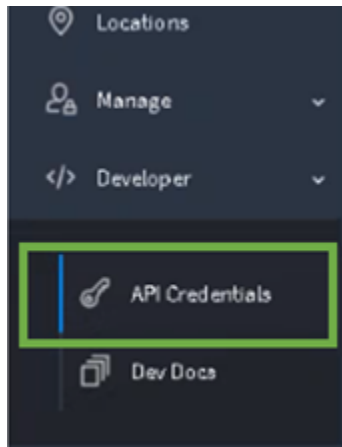

4. Complete the csgforte page and submit the application. When the application is approved, the dealer can log into the Forte/Dex Customer Portal.
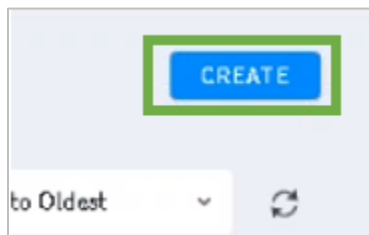
Create Forte/Dex API Credentials

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**:

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.

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:

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.

6.   Click the **Organizations** button on the left-hand tool bar:
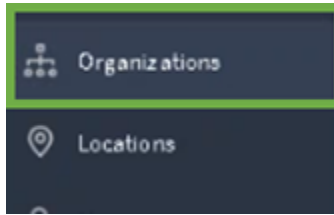
7.   Wait until this page lists the associated Organization(s).
8.   Click **Legal Name** to display the Organization details:
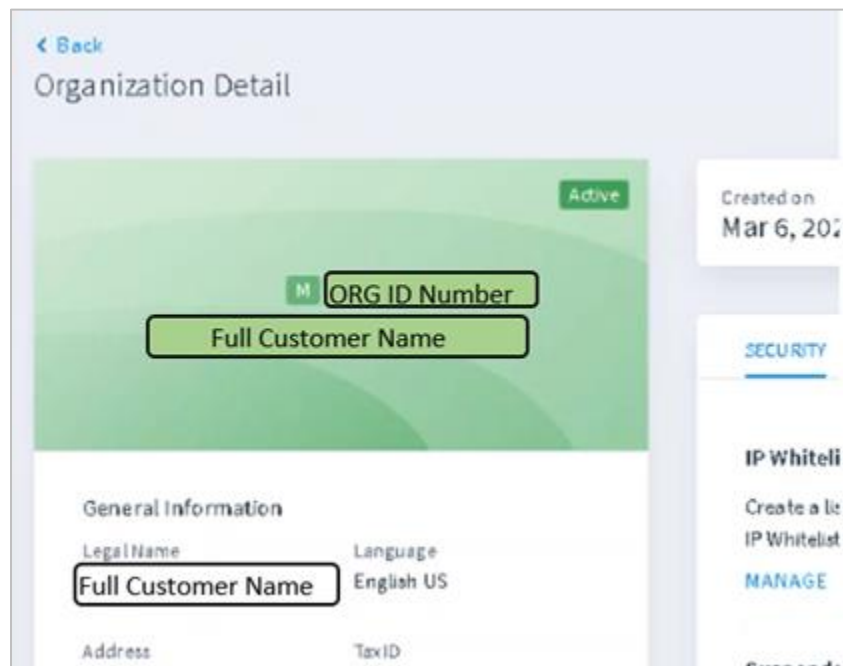
9.   Copy the 6 Digit Organization ID Number into the **Organization ID** field in Managely.
10.   In Forte/Dex, select the Locations tab from the left-hand tool bar:
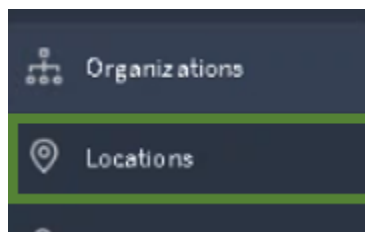
11.   Wait for the Organizations Location Details to be displayed.

12. Select the appropriate Address to display location details:

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.