

eCheck/Credit Card

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After being approved by Forte, use the eCheck/Credit Card page (Setup > Utilities > eCheck/Credit Card) to enter the credentials from Forte.

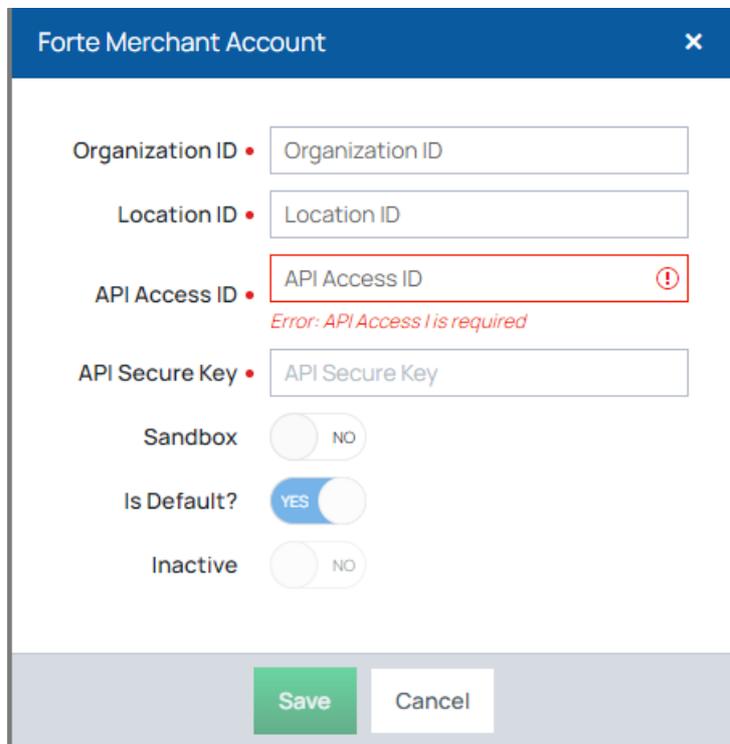
The eCheck/Credit Card page shows any existing Forte Merchant Accounts in the grid. The page has these buttons:

New Forte Merchant Account: Click this if you (as a dealer) do not have a Forte/Dex account.

Dex Documentation: Click this to log in to your account and view Dex documentation.

Forte PCI Compliance: Click this to log in to your account and view PCI compliance information.

+Add Forte Authorization: Click to open the Forte Merchant Account Form:



The screenshot shows a modal window titled "Forte Merchant Account". It contains the following fields and controls:

- Organization ID:** Text input field.
- Location ID:** Text input field.
- API Access ID:** Text input field with a red border and a red error message below it: "Error: API Access is required".
- API Secure Key:** Text input field.
- Sandbox:** Toggle switch set to "NO".
- Is Default?:** Toggle switch set to "YES".
- Inactive:** Toggle switch set to "NO".
- Buttons:** "Save" (green) and "Cancel" (white) buttons at the bottom.

Organization ID: Enter the value that comes from Forte.

Location ID: Enter the value that comes from Forte.

API Access ID: Enter the value that comes from Forte.

API Secure Key: Enter the value that comes from Forte.

Sandbox: To use this account in a sandbox environment for testing or training, turn this switch to YES. If this switch is set to NO and the information from Forte is correct, payments will process through this account.

Is Default?: Set this switch to YES if this is the primary (default) Forte account. There should be only one account set as the default. Whenever you add another account, it is set as the default. For payments, Managely uses the account on the customer's branch. If the customer's branch does not have an account, Managely uses the default

account.

Inactive: If this switch is set to YES, Managely will not use it for payments.
