Adding a new Merchant ID in Sedona Office

04/26/2024 1:21 pm EDT

When a user wants to add a new Merchant ID in SedonaOffice, this is a potentially complex task. The basic steps to add the Merchant ID are detailed below, but some pitfalls can arise. The largest of these is that payment methods are tokenized in our database. We do not store the payment information, and tokens are stored in Forte's database as part of the Merchant ID. If they were to change their branch to the new Merchant ID, any payment methods that are tokenized on the original MID will stop working. Depending on the number of tokens, they can either go through and remove the payment methods and re-tokenize them via manual entry, or a data project can be undertaken to migrate the tokens onto the new MID.

To perform a token migration the customer should first reach out to Forte and request that Forte move the tokens to the new MID. After Forte has made the change the customer can add the new MID to SedonaOffice following the steps below. Finally, SedonaOffice support can migrate the tokens from the old MID to the new MID. All three of those steps must be completed for the migrated tokens to function.

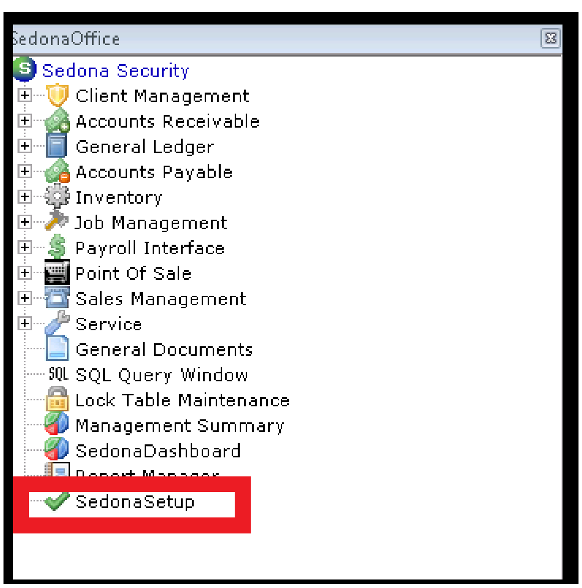
Steps to add a new MID

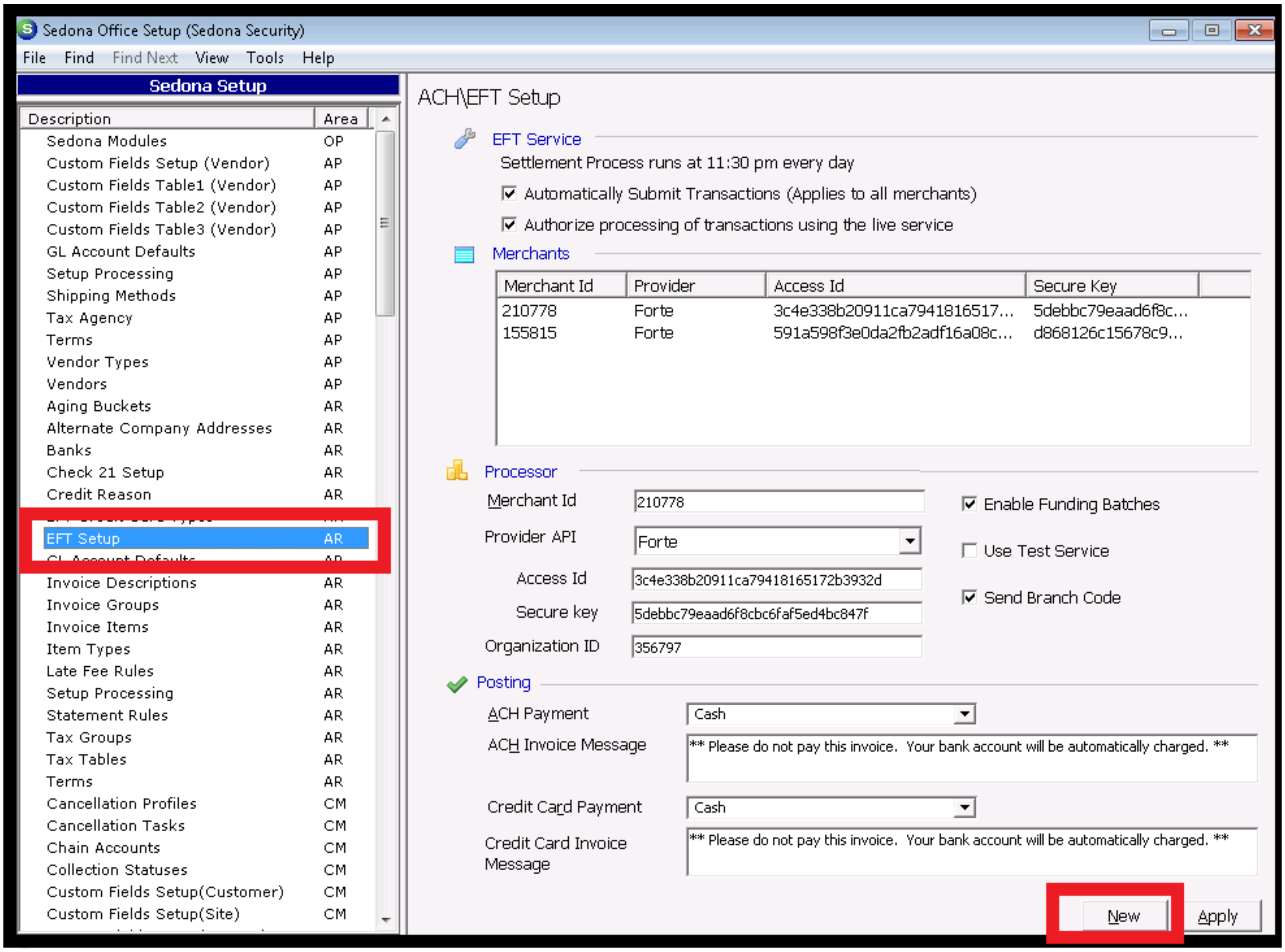
1. Go to Sedona Office EFT Setup.

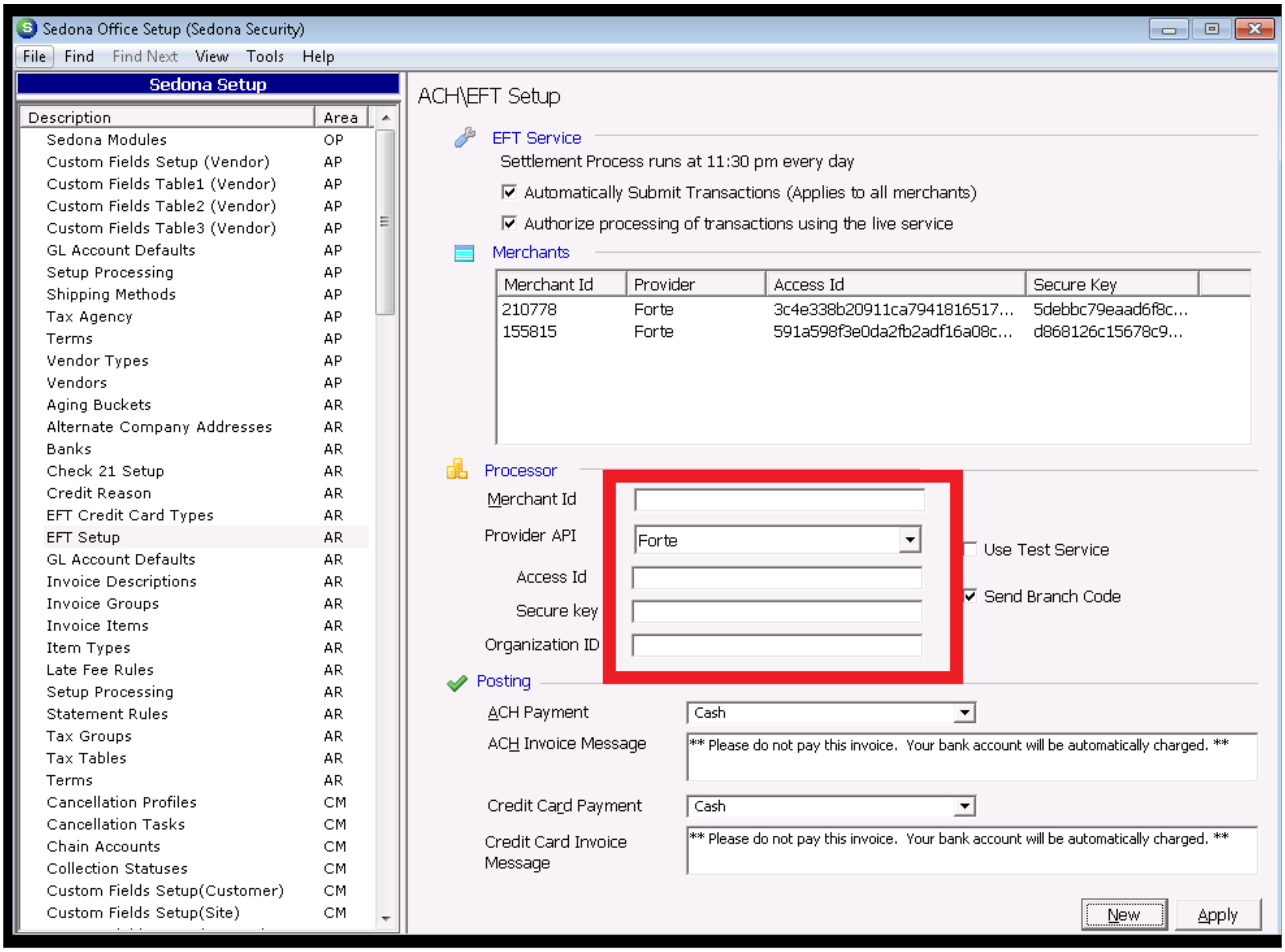
2. Select NEW.

3. Enter the information into the corresponding field for the new MID, its Secure Key, API ID, and Organization ID. This information is available in the DEX portal.

4. Apply the changes and you'll have added a new MID to SedonaOffice.

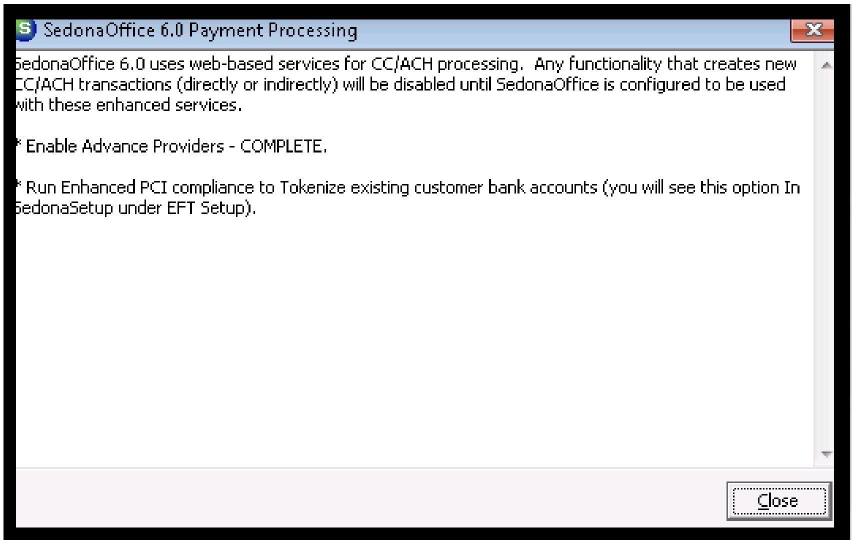



Sedona Office Setup (Sedona Security)
File Find Find Next View Tools Help
Sedona Setup
Description Area
Sedona Modules OP
Custom Fields Setup (Vendor) AP
Custom Fields Table1 (Vendor) AP
Custom Fields Table2 (Vendor) AP
Custom Fields Table3 (Vendor) AP
GL Account Defaults AP
Setup Processing AP
Shipping Methods AP
Tax Agency AP
Terms AP
Vendor Types AP
Vendors AP
Aging Buckets AR
Alternate Company Addresses AR
Banks AR
Check 21 Setup AR
Credit Reason AR
EFT Setup AR
Invoice Descriptions AR
Invoice Groups AR
Invoice Items AR
Item Types AR
Late Fee Rules AR
Setup Processing AR
Statement Rules AR
Tax Groups AR
Tax Tables AR
Terms AR
Cancellation Profiles CM
Cancellation Tasks CM
Chain Accounts CM
Collection Statuses CM
Custom Fields Setup(Customer) CM
Custom Fields Setup(Site) CM
ACH\EFT Setup
EFT Service
Settlement Process runs at 11:30 pm every day
Automatically Submit Transactions (Applies to all merchants)
Authorize processing of transactions using the live service
Merchants
Merchant Id Provider Access Id Secure Key
210778 Forte 3c4e338b20911ca7941816517... 5debbc79eaad6f8c...
155815 Forte 591a598f3e0da2fb2adf16a08c... d868126c15678c9...
Processor
Merchant Id 210778
Provider API Forte
Access Id 3c4e338b20911ca79418165172b3932d
Secure key 5debbc79eaad6f8cbc6faf5ed4bc847f
Organization ID 356797
Enable Funding Batches
Use Test Service
Send Branch Code
Posting
ACH Payment Cash
ACH Invoice Message ** Please do not pay this invoice. Your bank account will be automatically charged. **
Credit Card Payment Cash
Credit Card Invoice Message ** Please do not pay this invoice. Your bank account will be automatically charged. **
New
Apply



Potential issue

When you add the new MID, it may not be PCI compliant by default. If not, you will receive the following message when logging into Sedona Office. This can be corrected with the PCI Compliance tool, however, the effects of running the tool on a database in motion after the upgrade from 5 to 6 are not well documented. If you receive the message, escalate the case to Data so the X in the AR_ACH_Direct table can be updated to C for compliant after it is verified they have no un-tokenized payment methods.



	Setup_Id	Transmit_Id	Password	Merchant_Id	Merchant_Name	Batch_Description	Payment_Method_Id	CC_Payment_Method_Id	PCI_Compliant	PCI_APILoginId	PCI_SecureKey	Provider_API	API_L
1	2			155815			7	9	C			Forte	591a5
2	1	111111	5P3NVk3q	210778	Test Live Account		8	8	C	v6hBT2gKe	IxbbWDvT2qdypy	Forte	3c4e3
3	3			9999			8	8	X			Forte	9999