Forte Merchant ID [MID] Change/Acquisition Crosscheck

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When a company does anything with their Merchant ID, the integration with Forte can be effected in a number of ways. If you get a case where they are asking about making changes to their MID but haven't yet, suggest that a change of this complexity should be handled by a Professional Services project. The purpose of this guide is to establish baseline questions that you should ask when engaging with a customer who is about to or has changed their MID in SedonaOffice.

Oftentimes, customers that go through acquisitions, sell off customers, or repaper themselves under new management will also undergo a change with their Forte Merchant ID. There are several scenarios and the most common are listed towards the bottom of this guide. The initial questions should be answered in writing by the customer once you have determined from the case or Live Assist that the customer is in process for a MID change of any sort.

Troubleshooting Questions:

1. Will you be adding or have you already added a new MID to the SedonaOffice System?
2. Will you be adding or have you already changed an existing MID within the SedonaOffice System?
3. When your company submits transactions, do the submitted transactions show as rejected or error?
    - If they reject, what is the message they are receiving?
4. Are your transactions showing in the Ready tab?
5. Are you having issues with transactions for Credit Cards, Banks, or both?

Supporting Questions:

Have you acquired a new company?

***Scenario 1**

Customer has acquired a smaller company but doesn't know how to get the payment methods from the acquired company into their existing Sedona Office.

This is the most common scenario. It is important to

You can then find where you should be and troubleshoot from there.

On acquisition, the user should reach out to Forte and to Bold for a project.

Since the payment methods were tokenized on a different MID, Forte will need to transfer those tokens to the new owner's MID.

Bold will need to

Import the payment methods/customer tokens/customers.

Go to EFT Setup to add the MID, get the new MID PCI compliant.

Ensure the Branch table is set to use the new MID on the Branches that will use it.

Once those are complete, the user will need to test adding a new payment method on a new customer, and submitting a test transaction.

*Scenario 2

The company has been acquired and their MID is being updated to the parent MID.

This scenario is becoming more common as companies like Guardian and Pye Barker buy smaller companies but then leave them to operate their existing environment.

When they are acquired, the company should follow these steps:

Reach out to Forte to initiate the move of the payment tokens/customer tokens and begin a Bold data project.

Get a list of the payment tokens being moved.

Add a new MID to their EFT Setup.

Update all of the payment methods from the list to the new MID, update any transactions that have not yet been submitted in ar_ach to the new MID.

The old MID should remain intact both for historical information and because the transactions will not settle if the MID conflicts.

*Scenario 3

Have they done a partial sale of their customers?

Sometimes a company will sell only part of their customer base. This can lead to issues.

Reach out to Forte to initiate the move. Have a Bold case on standby to assist.

Once the payment/customer tokens have been transferred, verify that tokens that were not supposed to be moved still work.

Mark the sold branch customers as inactive.

While this should be seamless for the seller, there is a risk that Forte transfers more tokens than scoped. In this case, you will see error messages about

the tokens that should not have been moved not being found. While we cannot resolve that portion of the issue, we can lend weight to our user's issue and get Forte

to rectify the transfer.