

Dex Partner Hierarchy Migration Frequently Asked Questions

Q: What is the Dex Hierarchy Migration?

A: The Dex Partner Hierarchy was reconstructed as an organizational enhancement for partners with multiple partner organizations and portfolios. Existing Partner organizations will be consolidated into one of the supported CSG/Forte Supported Hierarchy Structures. As part of the portfolio consolidation plan, partners will receive a new Dex invite to the new partner organization. To minimize any potential impact to your business operations, portfolio consolidations will occur during non-peak hours.

Once the Dex hierarchy Migration is completed it will allow you to access all your Portfolio IDs, Rate Plans, Merchant Applications, Enterprise Merchant Organizations, Merchant Organizations, Merchant Locations and with a single view access.

CSG/Forte Supported Hierarchy Structure

- **Single Partner Hierarchy**
 - a. One Partner Organization
- **Multiple Partner Hierarchy**
 - b. Parent Organization with Sub- Partner Organizations
 - c. Parent Organization with Sub- Partner Organizations & Sub-Child Partner Organizations

[Dex Layout Preview](#)

Q: What is a Partner Organization?

A: A Partner Organization is the legal entity that owns and supports Merchant Enterprise Organizations, Merchant Organizations and Merchant Locations.

Q: What is a Sub-Partner Organization?

A: A Sub-Partner Organization is a separate legal entity that owns and supports Merchant Organizations and Locations. The Sub-Partner Organization is owned by an existing Parent Organization for a separate business unit.

Q: What is Portfolio ID (formerly known as ISO ID)?

A: A Portfolio ID is the contract ID that includes the partner pricing model, rate plans, bank account information for commission or billing payments, and Sales reps. The Portfolio ID also controls the merchant pricing and setup at the Merchant Location.

Q: Are there any changes needed at the Merchant Organization and Location Level in Dex?

A: Yes, once the Enterprise/Merchant Organization is migrated to the new Parent Organization, the new parent organization will be shown at the Enterprise/Merchant Organization(s).

There will be no changes to the Merchant Location in Dex.

Q: Who is affected by the Dex Hierarchy changes?

A: All Partner Organizations with more than one Partner Organization will be affected with this new hierarchy structure.

Only Partners that have integrated to Forte REST API (Application Programming Interface) Solutions will have a direct impact to their business operations and will need to generate new keys in the new partner and sub-partner organization.

Q: When will my portfolios be combined?

A: Forte will begin migration during non-peaks hours, these migrations are scheduled over a series of weeks.

Q: What will happen to my existing users?

A: All existing users will need to be re-invited to the new partner organization.

Important Integrated Partners Migration Requirements Only

As a CSG Forte Integrated Partner additional testing will be required to ensure API connections are performing correctly and all necessary information is transmitted securely.

Partners with Partner Organization Level credentials will need to test all API connections.

Please Note: If the API credentials are generated at the Merchant Organization level in Dex, then there are no requirements for testing or re-generation of API keys. There should be no impact to merchants API connections.

Generate new API Credentials under your new Partner and Sub-Partner Organizations within Dex.

Test all REST Ends Points with the new credentials under your test merchant organization.

Development Documentation Resource Information:

- <https://www.forte.net/devdocs/>
- <https://restdocs.forte.net/>

Integrated Partner Support Contact:

If you have any questions or need help with testing, please contact Integrationsupport@forte.net or call 866-290-5400 Option 5.

Partner Resource Information:

<https://support.forte.net/support/solutions/articles/11000112019-dex-organizational-definitions>