Go-To-Market with Merge

How to support your product integrations successfully

Setup and troubleshooting overview

For customer success and support teams

MERGE

Welcome to Merge

This guide is designed for customer success teams and technical support.

Merge is one API to add hundreds of integrations to your product. Merge's platform makes secure data access easy by offering Unified APIs across key software categories, including HRIS, accounting, CRM, file storage, and more. Over thousands of customers across all industries and sizes use Merge to power their integrations at scale.

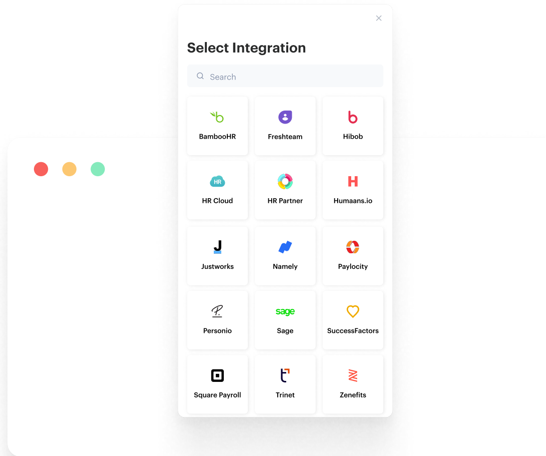
Below you'll find an introduction to setting up integrations, an overview of the Merge Dashboard, troubleshooting tips, and further resources in the Appendix to better understand Merge and the integrations space.

Contents

Setting up an integration

Creating a Linked Account

Your user enters their credentials into our drop-in UI component Merge Link, creating a connection between your customer and their third-party app called a "Linked Account."



Syncing data from the integration

Providing integrations is fundamental in bringing value to your customers

How Merge syncs data:

1. Requests data from third-party platform via API call (outbound request)
2. Merge normalizes data
3. Your app makes a request to Merge (inbound request)

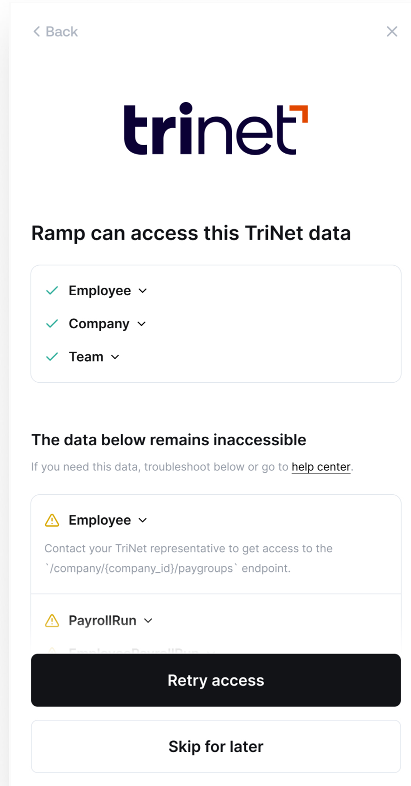
Benefits of data synced via Merge:

- Standardized data format called "Common Models" are easier to understand
- No need to go through different integrations' API docs
- Merge can also receive data via webhooks

Linking flow error messages

Linking flow error messages detail what we are able to access and what we are not able to access, along with remediation steps.

They surface potential errors with the sync when the account is linked and allow your user to go back and fix the error (if needed)!

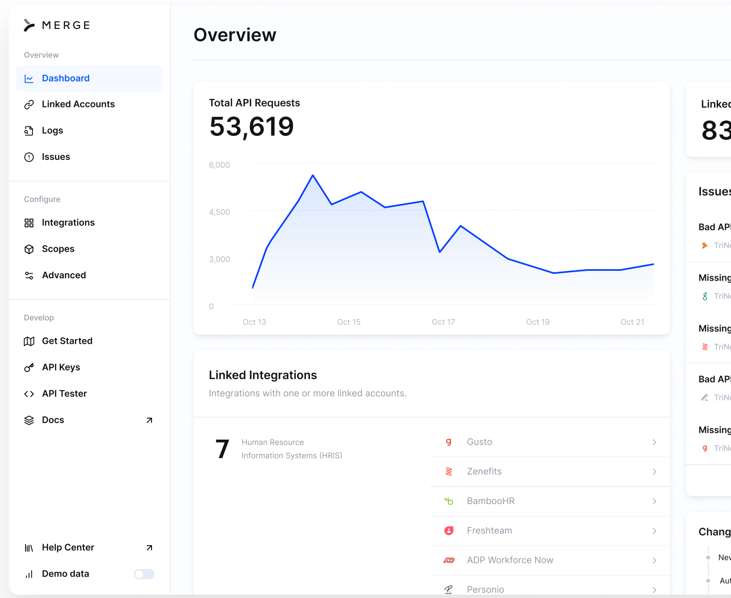


Dashboard overview

Dashboard

The Merge Dashboard offers a comprehensive suite of features that addresses all aspects of Integrations Observability. We define Integrations Observability as a set of tools that give you full visibility and control over your product's integrations to ensure that they are stable, reliable, and operating the way you intend.

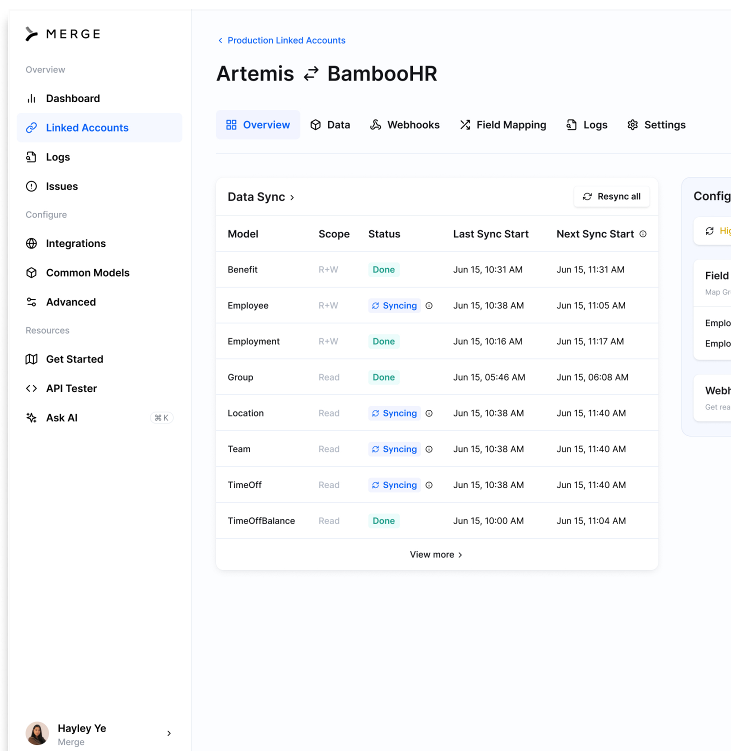
Specifically, the Dashboard provides an overview of your integrations through Merge, including the total outbound requests made to API providers, number of Linked Accounts, ongoing issues, and our Changelog.



Linked Accounts page

The second tab you'll see gives an overview of all your users who have linked integrations via Merge under the Production Linked Accounts tab. This page will give information such as your user's name, the integration, and when the account was linked.

Clicking into a Linked Account will provide more detailed information, such as Common Model sync status, Linked Account ID, and quick access to Issues, Logs or the API Tester. These are helpful for debugging!

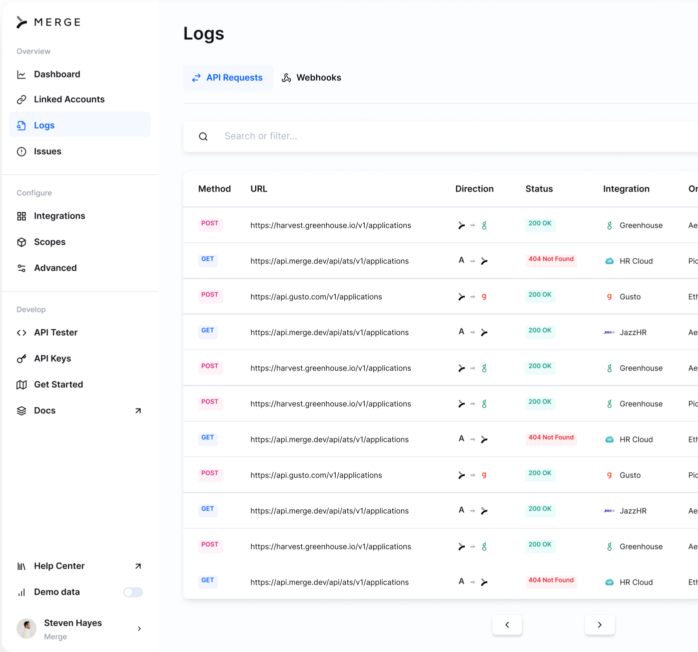


Logs page

The Logs Dashboard is a comprehensive record of all the API calls associated with your organization, and it’s a helpful tool to [search for API calls](#) associated with your user’s account to troubleshoot further.

Some important filters are:

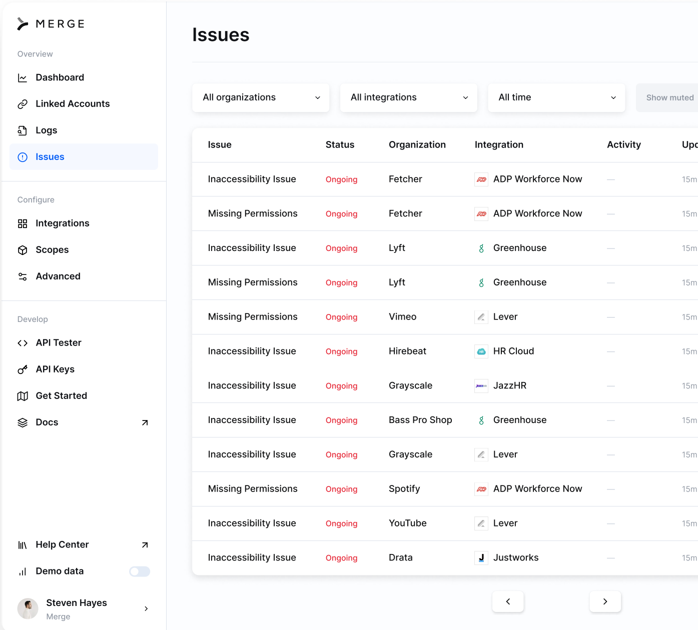
- **Organization:** the name of your end user
- **Direction:** outbound includes data retrieved from Merge's request to third parties, and inbound includes data retrieved by Merge's customer from Merge
- **Response code:** success or failure of an API call



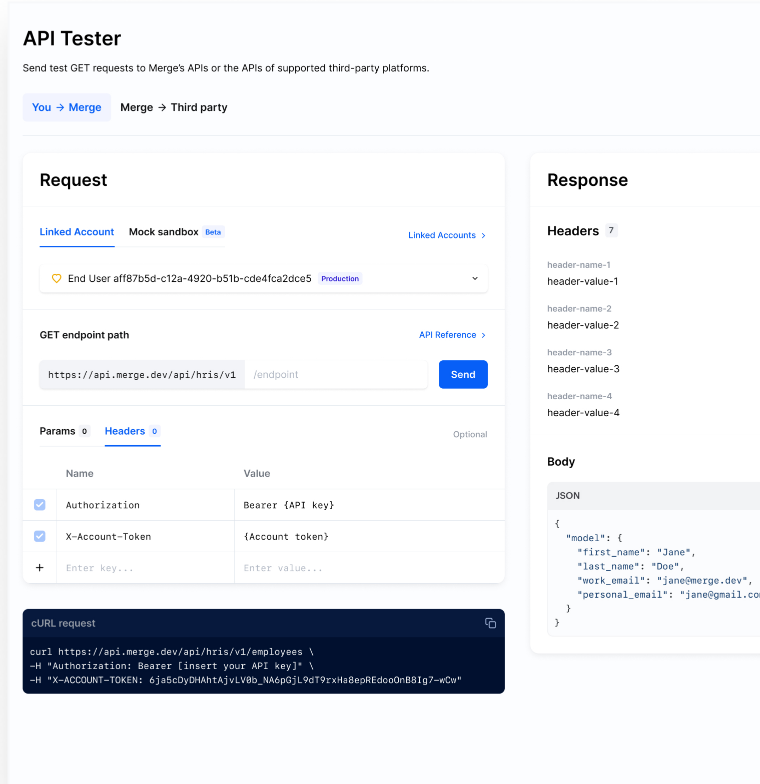
Issues page

This page is built from the data in Logs to provide some insight on the specific cause of an issue (we surface root causes such as bad API keys, missing permissions, rate limits, and a few others).

Further details include the affected account, when we detected it, and the specific logs where we detected the issue. We'll also include details about the detected issue to help you resolve it with your customers.



API Tester

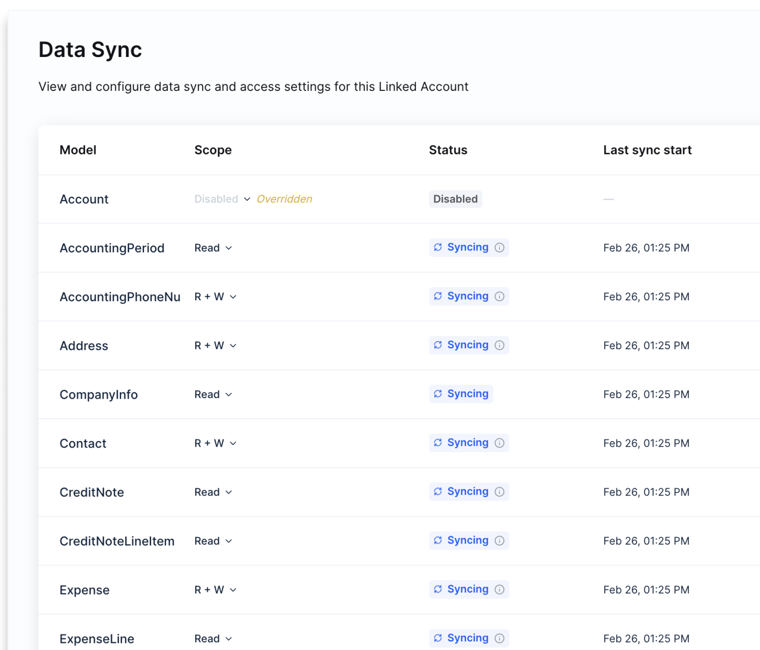


This tool allows you to directly hit the third-party's API to see if the data you're looking for is provided by the third-party platform. You can also hit Merge's database to see what data is currently stored.

The API tester helps you to validate how data is returned in the third-party system, stored in Merge, and compare that to how it's being surfaced in your product.

To use it, select the Linked Account you're looking for and construct the endpoint path based on the integration's API documentation.

Force resyncs

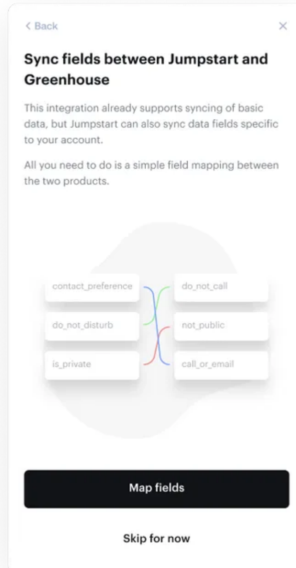


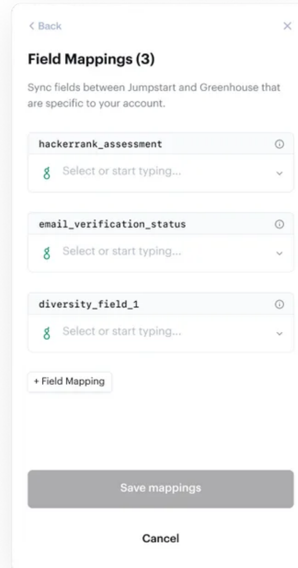
If you're missing recently added data, you can force resync for a specific Linked Account to trigger a fresh sync of data.

Field Mapping

Field Mapping allows you or your customer to map custom fields to the Merge Common Model. This allows you to pull in data that we don't normalize from the third-party's API without searching through their API responses in our user-friendly interface.

There's a lot of flexibility – you can enable your customer to set this up in Merge Link, you can set up a Field Mapping for an entire integration, or you can choose a Field Mapping just for one Linked Account in the Dashboard.





Troubleshooting the setup of a Linked Account

Errors with initial linking

Questions for your user when they see errors

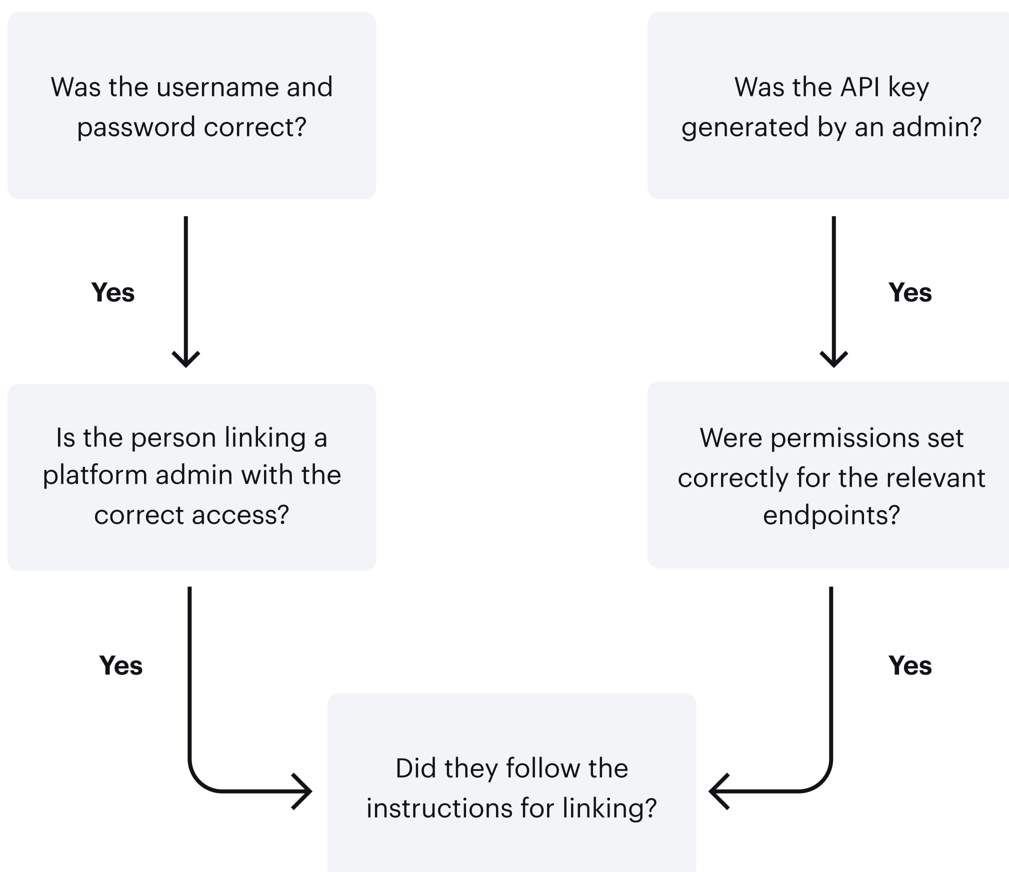
If you see issues with the initial linking, you should run through these questions. If any of these answers are “no,” then the Linked Account will not be set up properly! You should work with your user to ensure that all these answers become a “yes.”

OAuth Error Flow:

Putting in a Username/Password

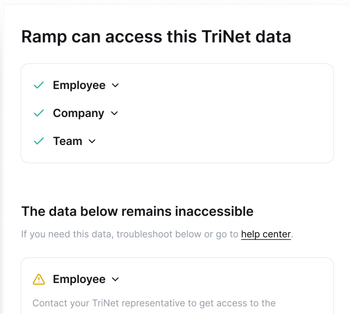
API Key Error Flow:

Creating an API Key in The Platform



Where to pinpoint root causes of errors

On the user side (Merge Link)



Merge Link indicates failure

↓

The customer should ensure they input the requested data correctly and pull them from the correct fields in their third-party platform. They should also read any error messages that can help them troubleshoot.

Data fails to sync after successful link

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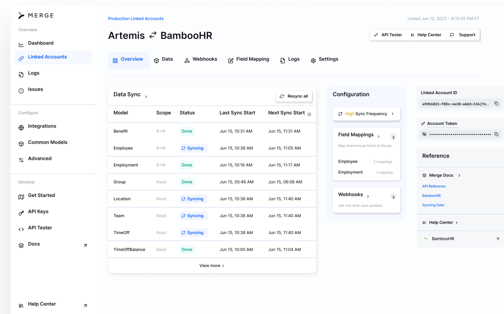
We are able to validate the credentials, but permissions are missing for us to access and sync the data. Our detailed error messaging should flag this if this is the case.

On the Merge side (Dashboard)



Incomplete Link

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The setup process was not complete. We won't have any data synced, so your customer should try again to link their account.

Relink needed

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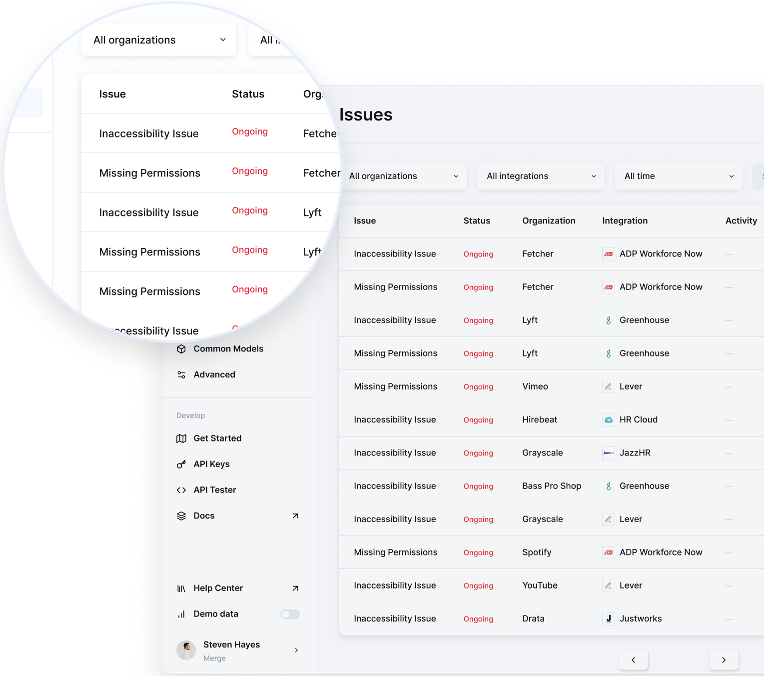
We have not successfully made an API call in the last 9 hours, usually due to credentials becoming invalid. We will be unable to sync updated data, so your customer should input their credentials again.

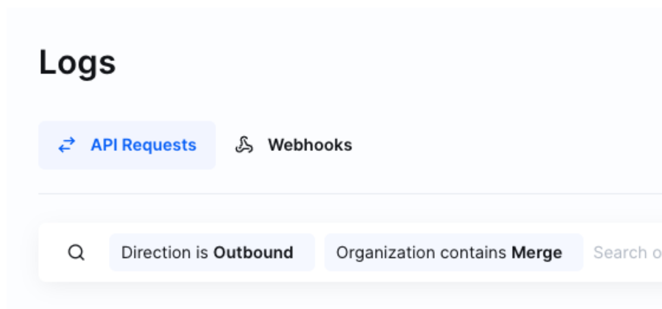
Diving deeper into root causes: using Iissues



The Issues section can also give you insight into the general scope of what may be occurring with the Linked Account – these errors will be less technically detailed but give detailed information such as “bad API keys” or “missing permissions.” There is Detailed Error Messaging that provides a recommendation for you to share your customers.

Diving deeper into root causes: using logs

Filtering by Organization allows you to return logs from a specific Linked Account, and the "Outbound" direction filter returns logs when Merge makes API requests to the third-party platform.



Error codes

Merge uses standard HTTP codes to indicate when an API request is successful or errored. Listed below are some examples of error codes and troubleshooting tips to resolve these errors. For a more comprehensive list of Merge's response codes, visit this Help Center article.

Example response codes	What to do
400: Bad Request	Retry and contact support.
401: Unauthorized	Update authentication or relink (guide here).
403: Forbidden Access	Check our authentication guides on what permissions you need for each integration.

Troubleshooting missing data

If data Is missing from all Common Models:

Presenting issue	Next steps
Is the account done syncing?	From the Linked Account page, click into the organization that is missing data to check if the data syncs have completed.
Is the Common Model enabled by the third-party platform?	Navigate to Common Models under "Configuration" to manage the standardized data models that you interact with via Merge's Unified API.
Is the Common Model or field supported by the third-party platform?	Our Supported Fields documentation shows if the integration supports that specific dataset.
Was the API request properly formatted?	Filter for the API request in the Logs page, then use our Error Codes guide to debug what the issue and solution is for a malformed API request.
Does that information exist?	Your customer might have empty fields, insufficient permissions, or the third-party doesn't provide that information via API (you can use the API Tester tool to see if the data is accessible).
Can we access that information?	Did the user properly link their account with the correct credentials and scopes?

If data is missing from just some objects:

Did you check the status of all Common Models?

The same issues from the previous page could apply, specifically: incomplete data syncs, improperly formatted API requests, or the data doesn't exist in the third-party platform.

Check the sync status within the Linked Account, Logs dashboard to find specific API requests, or the API tester respectively.

There may be something else going on.

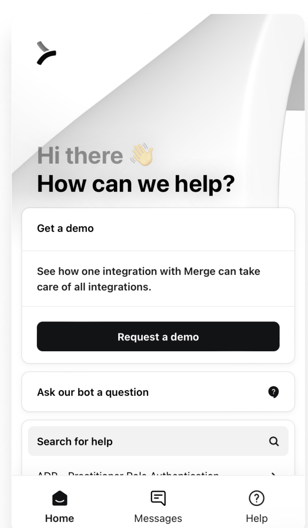
Reach out to us for help! You can contact us via chat in the bottom right corner when you're logged into Merge, or you can email us at support@merge.dev.

Please include the Linked Account ID (found in the Linked Account details), the integration / user name, and links to any logs that might be helpful.

Escalation routes when issues arise

We're here to help if you have questions on any of these issues!

1. Our Help Center covers frequently asked questions, step-by-step instructions for specific providers, and detailed definitions of terms.
2. If you need quick assistance, chat with us over Intercom in the lower right corner of your Merge Dashboard, or email support@merge.dev.
3. You can always book a call with your Customer Support Manager to walk through any of your questions such as helping your users link their accounts!



Appendix

Gain a broader understanding of Merge and the integrations space

The integration problem

Understand the integration problem that Merge is helping to solve and why integrations are important to your customers.

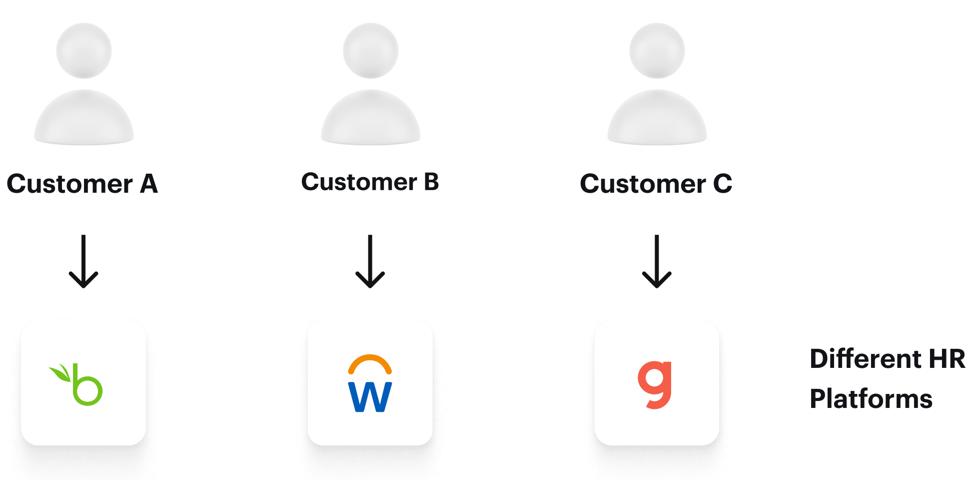
Integrations are a competitive advantage

Providing integrations is fundamental in bringing value to your customers

- **39%** of buyers look at "integration potential with currently owned software" as the **most important factor** when selecting a provider (Gartner 2023 Global Software Buying Trends).
- **Integrations** automatically connect data between various platforms, increasing productivity and transforming business operations.
- **Connecting data** increases your product value and delivers better customer success.

Fragmented SaaS economy

Companies use a lot of software; some report up to 211 applications. Building one integration is time-consuming and resource intensive, and your customers are likely using different platforms in the same category.



Core messaging

Ensure that your customers understand Merge so they can trust the way you offer integrations.

Merge messaging framework

1. "Merge is an API provider of B2B integrations that companies leverage to add hundreds of integrations to their product. This allows our customers, like yourself, to securely authorize and access data from hundreds of software providers."

2. "By offering integrations through Merge, we are able to reduce friction and seamlessly enhance our product experience."

3. "Merge is trusted and used by over thousand of companies across all industries and sizes, including Drata, Ramp, Navan, Gong, and Semgrep."

4. "Merge is a dedicated integrations provider who brings expertise and robust monitoring, resulting in a significant reduction in issues and downtime impact for our customers."

Feature messaging

Use the following language if your customers are looking to understand the value that Merge provides, including features and data security

Connect effortlessly

“Merge enables you to connect your preferred software provider to [Company Name] in seconds in order to easily share relevant data.”

Share your data securely

“Merge is built to protect your data in accordance to industry-standard compliance frameworks including SOC 2 Type II and ISO 27001, and complies with privacy regulations like HIPAA, GDPR, and CCPA.”

Experience top-tier support

“Merge helps us proactively identify and alert you if there are any issues with your connection, reducing downtime impact.”

Security features with Merge

Because Merge stores end user data, it has been designed from the ground up to adhere with the industry's highest standards of security and privacy.

SOC 2, ISO, HIPAA, GDPR

Merge is SOC 2 Type II, ISO 27001, HIPAA, and GDPR compliant. You can see more in our Trust Center for our real-time security and compliance posture in our continuous control monitoring dashboard.

SOC II Type 2

ISO 27001

HIPAA

GDPR

Data security at the highest levels of industry standards

Uptime
Fault-tolerant infrastructure ensures availability even during extreme demand.

Data centers
All data is stored in Amazon Web Services (AWS) data centers in North America and Europe with enterprise-grade physical and network security.

Encryption
Data is encrypted at rest and in transit, and PII is protected with an additional layer of application encryption.

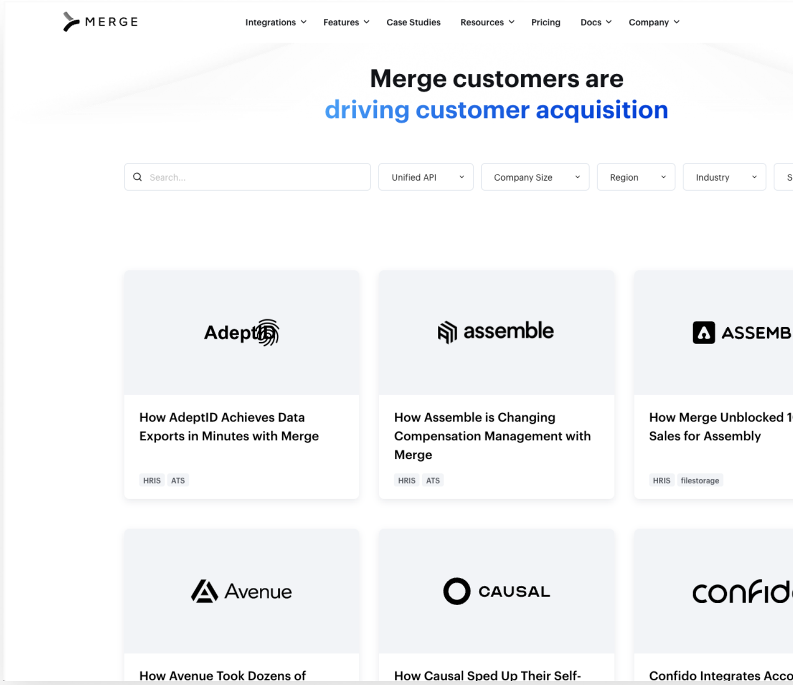
Defense in depth
Merge maintains separate networks for web servers and databases, detects and logs access to systems, and grants unique credentials for each employee and tool.

Shift left
Our developers are proactive when it comes to security and use both DAST and SAST security scanning tools.

Penetration testing
Our security team conducts penetration testing every year and an automated scan on a weekly basis.

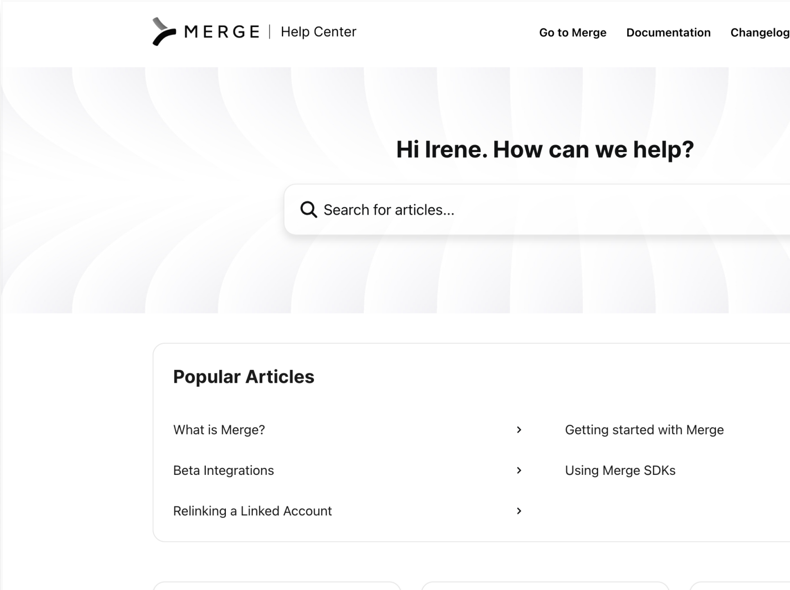
Check Out Our [Case Studies](#)!

Read how other B2B companies are using Merge to better serve their customers.



Visit Our [Help Center](#)

Get assistance and learn about common issues and solutions, best practices, frequently asked questions, and more.



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