

**Rev19**



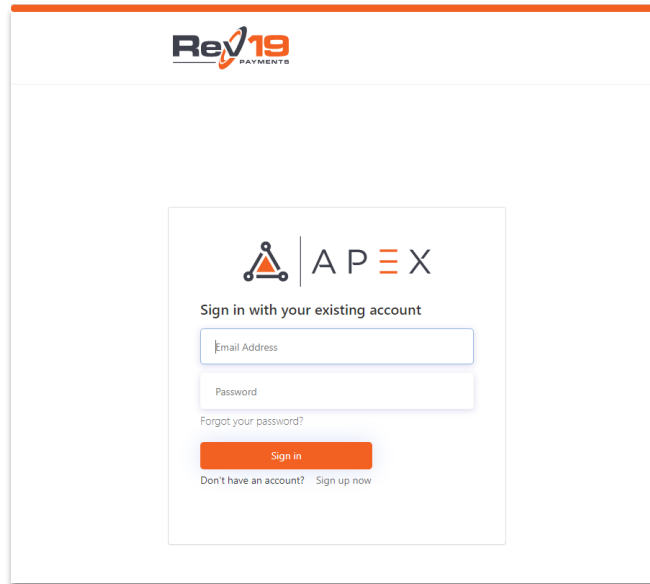
**APEX Virtual Terminal**

## Contents

Logging into the Apex Portal .....	3
Viewing Your Virtual Terminal the Apex Portal.....	4
Processing a Virtual Terminal Transaction .....	4
Confirmation Page.....	5
Voiding a Transaction.....	5
Refunding a Transaction.....	6

## Logging into the Apex Portal

1. Go to the Apex Portal site, using the url provided to you upon setup.



Rev19  
PAYMENTS

APEX

Sign in with your existing account

Email Address

Password

[Forgot your password?](#)

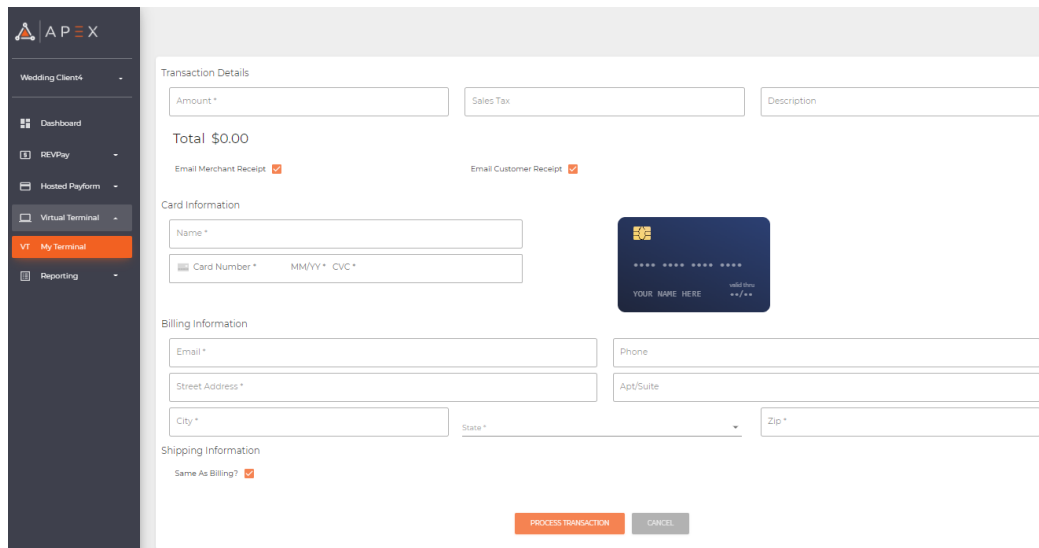
[Sign in](#)

[Don't have an account? Sign up now](#)

2. Enter in the credentials that were provided to you upon setup and click **Sign in**.
  - a. If the password needs to be reset, select the **Forgot your password?** link below the **Password** field. Follow the steps to reset your password. You will need to know and have access to the email address associated to your Apex Portal account.
3. Once logged in, refer to the follow sections to access your Virtual Terminal.

## Viewing Your Virtual Terminal in the Apex Portal

1. To view your virtual terminal, select the **Virtual Terminal** menu option and select the **My Terminal** submenu.
2. From the My Terminal page, you are able to process card transactions for your customers.  
*NOTE:* My Terminal is a standard terminal that currently does not allow for customization.



The screenshot displays the Apex Portal interface for processing a virtual terminal transaction. On the left is a dark sidebar with navigation options: Wedding Clients, Dashboard, REVPlay, Hosted Platform, Virtual Terminal (highlighted), My Terminal (highlighted), and Reporting. The main content area is titled 'Transaction Details' and includes the following sections:

- Transaction Details:** Fields for Amount\*, Sales Tax, and Description.
- Total:** Displayed as \$0.00.
- Receipts:** Checkboxes for Email Merchant Receipt (checked) and Email Customer Receipt (checked).
- Card Information:** Fields for Name\*, Card Number\* (with MM/YY\* and CVC\* sub-fields), and a credit card graphic placeholder showing 'YOUR NAME HERE' and '\*\*\*\* \*'. The graphic also includes a small logo and the text 'www.apex.com'.
- Billing Information:** Fields for Email\*, Phone, Street Address\*, Apt/Suite, City\*, State\* (dropdown), and Zip\*.
- Shipping Information:** A checkbox for 'Same As Billing?' (checked).

At the bottom right of the form are two buttons: 'PROCESS TRANSACTION' (orange) and 'CANCEL' (grey).

## Processing a Virtual Terminal Transaction

1. Once on My Terminal, you can easily follow the steps/fields to complete a transaction.
  - a. Required fields are indicated with a '\*'.
  - b. When Sales Tax is entered, the Total will automatically be updated with the new 'Total'.
  - c. Field validation rules are presented when a field is not properly completed.
  - d. The credit card graphic will display name, card number, exp date, and cvc as they are entered.
  - e. To enter a separate Shipping Address, you should click on the 'Same as Billing?' checkbox. This will display the Shipping Address fields.
2. Review all fields to ensure that all fields are accurate.
3. Once all applicable fields are completed, select the **Process Transaction** button.

### Emailed Receipts

When completing the My Terminal transaction information, there are two email receipt options:

- Email Merchant Receipt – if selected, an email receipt will be sent to the merchant's email on record.

- Email Customer Receipt – if selected, an email receipt will be sent to the customer’s email entered in the Email field on My Terminal.

Example of Email Customer Receipt:

Wedding Client 4 Payment Confirmation \$14,548.15 USD Inbox x

Rev19 <support@rev19.net>  
to Faith ▾



Thank you Faith Olsen, your payment has been received, see details below.

Payment Information:

Merchant Name: Wedding Client 4  
Payment Date: Monday, 21 September 2020  
Total Amount: \$14,548.15 USD  
Payment Card Type: American Express \*\*\*\*\*2376  
Transaction ID: 23935418

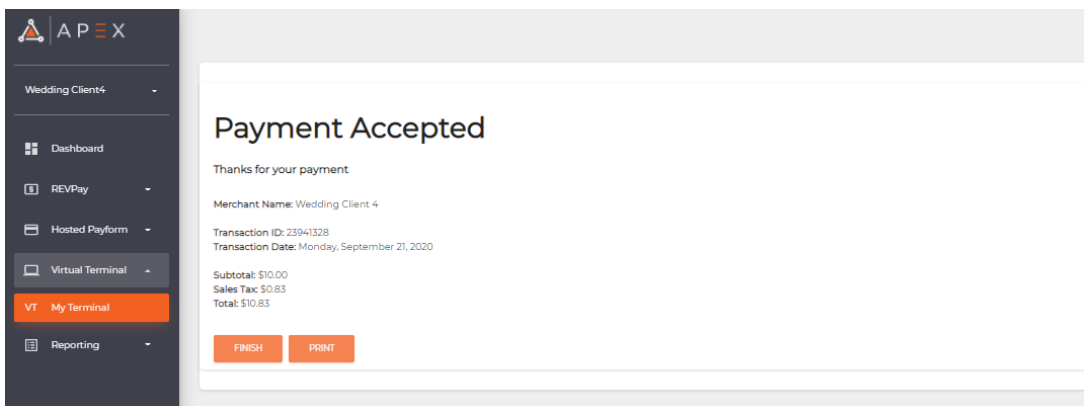


## Confirmation Page

If payment is successful, you will be presented with the Payment Accepted screen.

Finish: To ‘Finish’ the transaction, select the Finish button.

Print: To print your Payment Confirmation, select the Print button.



## Voiding a Transaction

**Transaction 23731108**

Sale  
\$351.87  
Approved  
Print Receipt

**Transaction Information**  
Merchant: Beneficial Roofing LLC  
Transaction ID: 23731108  
Status: Approved

**Credit Card Information**  
CC Number: \*\*\*\*\*8888  
CC Type: Visa

**Billing Information**  
Bentley Patrick  
hpfcust+1042@gmail.com  
14 Stillwell Avenue  
New York MD 78808

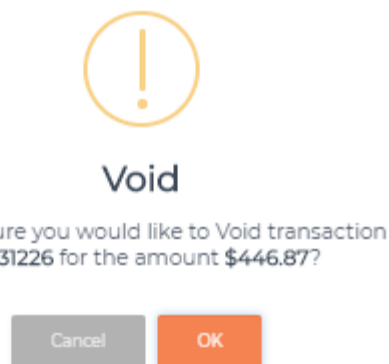
**Shipping Information**  
Bentley Patrick  
hpfcust+1042@gmail.com  
12 Tabor Court  
Washington WI 84905

**General Information**  
Description: A paragraph is a self-contained unit of a discourse in writing dealing

**Transaction History**

Transaction Id	Date	Type	Amount	Status	Settlement Status
23731108	08/31/2020 01:42:18 PM CST	Sale	\$351.87	Approved	Pending Settlement

Before a transaction is settled, Void transaction is an available action. To Void a transaction, select the Void button. Once the Void button is selected, confirm the void on the Void modal. The funds will be returned to the customer very quickly.



- Void button will no longer be available once transaction is settled
- Void button will no longer be available once transaction has already been voided

## Refunding a Transaction

Once a transaction is settled, Refund transaction is an available action. To Refund a transaction, select the Refund button. The Refund button is located in the same position on the screen as the Void button.

Refunds are done in the full transaction amount or Partial Amount

Enter the amount to refund on the Confirmation modal to submit Refund

**For questions or concerns, please contact Rev19 Support:**

Email: [support@rev19.net](mailto:support@rev19.net)

Phone: 888-708-8019