



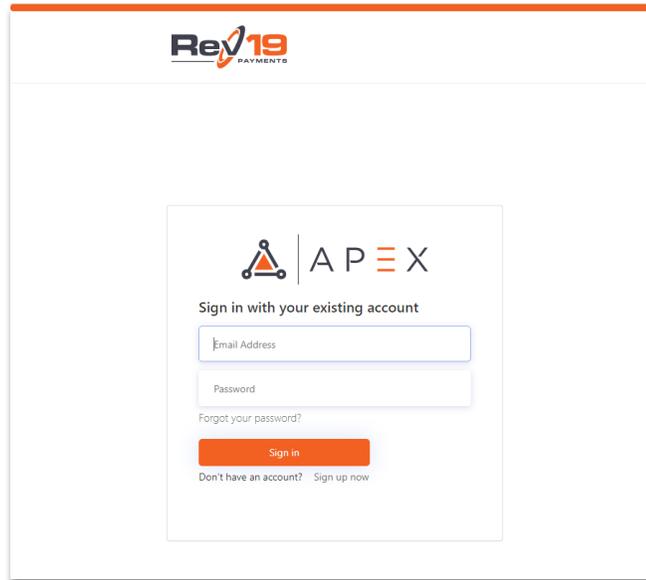
**Using the APEX Dashboard**

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## 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](#)

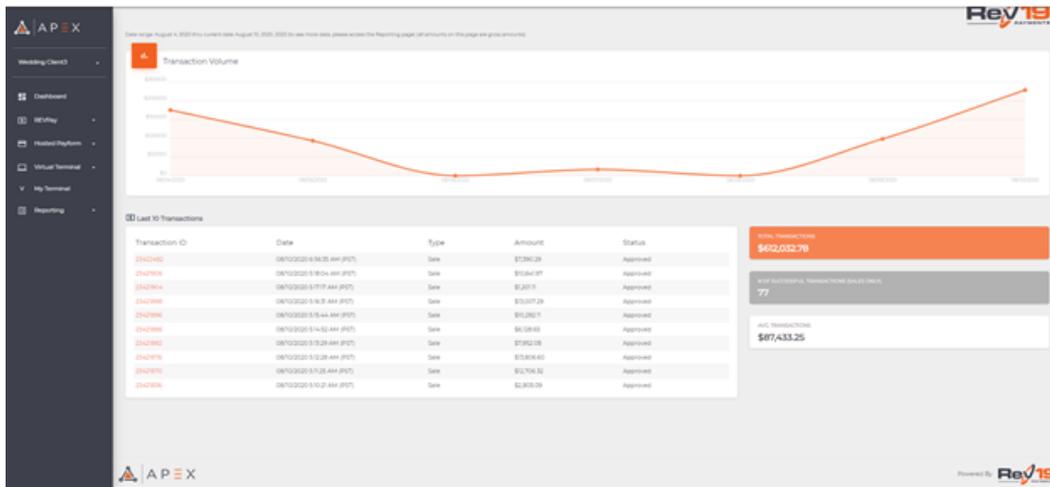
2. Enter in the credentials that were provided to you upon setup and click **Sign in**.
  - a. If the password needs to be reset, select the **Forgot your password?** link below the **Password** field. Follow the steps to reset your password. You will need to know and have access to the email address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

## Viewing Your Dashboard in the Apex Portal

Your Dashboard is the introduction page when you sign into the Apex Portal.

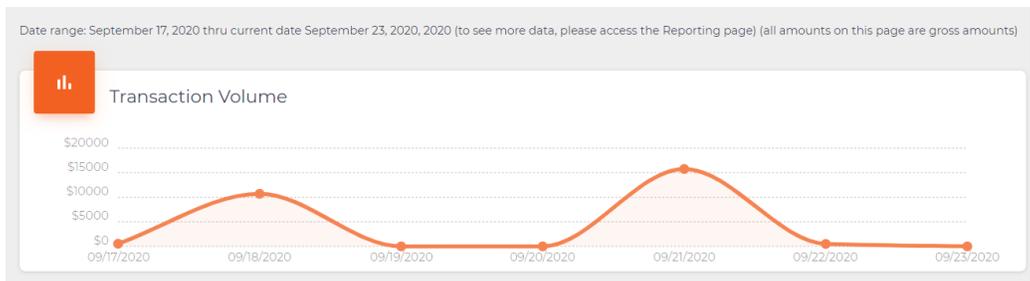
**NOTE:** If this is your first time using our Apex Portal to manage your Transactional Data, you may not have any information on your dashboard yet.

This page is broken into multiple sections that each provide specific transactional information.



## Date Range

Informational message that displays the beginning date and ending date of a 7-day range which is used to generate and display the merchant's transactional data in the graph below. This is prepopulated based on the actual date viewed and cannot be modified.



## Transaction Volume

A graphical representation of each daily transaction amount for the last 7 days, inclusive of the current date. The actual daily amount displays when hovering over the graph point for each day.



## List of Last 10 Transactions

The ten most recent transactions, on the current date, are displayed in the Transaction List. If ten transactions have not been processed on the Merchant Account, then all of the most recent transactions completed are displayed. The transactions are sorted by the most recent on top.

Transaction ID	Date	Type	Amount	Status
23950910	09/22/2020 10:42:30 AM (CST)	Sale	\$500.00	Approved
23941328	09/21/2020 2:00:11 PM (CST)	Sale	\$10.83	Approved
23937610	09/21/2020 11:25:55 AM (CST)	Sale	\$10.83	Approved

## Transaction ID

The transaction number assigned to the transaction by the processor. If the transaction is a purchase, authorization, or capture, the transaction ID is the primary transaction ID. If the transaction is a refund or void, the transaction ID is the secondary transaction ID of a previous primary transaction ID. You can click on the transaction ID to **view data from the original sale, run a void, or capture/cancel a preauthorization.**

Transaction 23950910

Void

Transaction Information

Merchant: Wedding Client 4  
Transaction ID: 23950910  
Status: Approved

Credit Card Information

CC Number: \*\*\*\*\*8888  
CC Type: Visa

Sale  
\$500.00  
Approved

Print Receipt

Date: 09/22/2020 10:42:30 AM CST  
Transaction Type: Sale  
Settlement Status: Pending Settlement

Auth Code: TAS708  
Currency: USD

Back

## Void or Refund from Transaction ID screen

If a batch is still open, you can **void** the transaction right from this tab. If the batch is settled then the void button will show as **refund**. This is also where to find the button for **Print Receipt**.

## Transaction 23936384

Auth Only  
\$150.00  
✔ Approved

Back

Capture

Void

Print Receipt

### Transaction Information

Merchant: Pies We Love  
Transaction ID: 23936384  
Status: Approved

Date: 09/21/2020 09:38:06 AM CST  
Transaction Type: Auth Only  
Settlement Status: Pending Capture

## Capture/void a pre-authorized sale

To **capture a pre-authorized sale**, or **release the funds in a void**, you would just choose the coinciding option from the **Transaction ID** screen.

**NOTE:** These steps are only for the last 10 transactions. If you are looking to refund, void, or capture an auth on a transaction older than the past 10, please refer to the **Reporting** training document.

Transaction ID	Date	Type	Amount	Status
23950910	09/22/2020 10:42:30 AM (CST)	Sale	\$500.00	Approved
23941328	09/21/2020 2:00:11 PM (CST)	Sale	\$10.83	Approved

## Date

The **date, time, and time zone** of the processed transaction.

## Type

The processed **transaction type**, which include

- Authorization
- Sale – Purchase and Capture
- Void
- Refund

## Transaction Amount

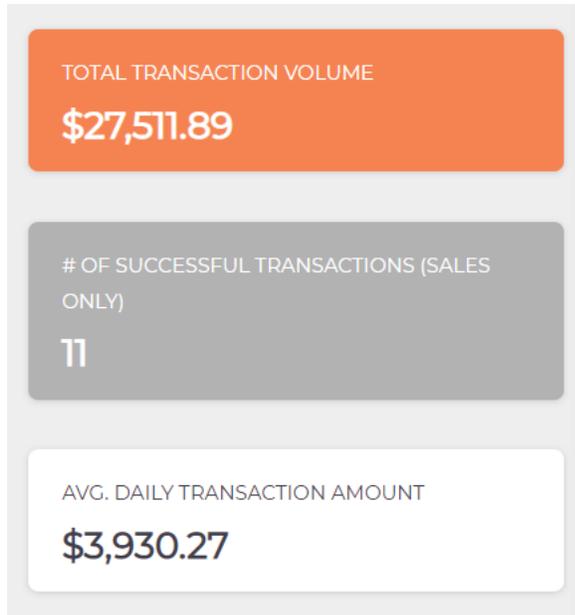
The **amount** of the processed transaction.

## Status

The status of the transaction will display **approved, if processed, or declined**.

## Dashboard Summary

The Dashboard includes 3 categories of summary metrics in the 7-day date range.



### Total Transaction Volume

The sum of Sale and Capture transaction amounts for the last seven days, inclusive of current date.

### # of Successful Transactions (Sales Only)

The count of successful/approved Sale and Capture transactions that were processing in the past 7 days, inclusive of current date.

### Avg. Daily Transaction Amount

The sum of Sale and Capture transaction amounts for the last 7 days, inclusive of current date, divided by 7 days

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

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