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APEX Gateway  
**VIRTUAL TERMINAL**

Date: 06/08/2022

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## Viewing Your Virtual Terminal in the Apex Portal

- To view your virtual terminal, select the **Virtual Terminal** menu option and select the **My Terminal** submenu.
- From the My Terminal page, you can process credit card and eCheck transactions for your customers.

**NOTE:** My Terminal is a standard terminal that currently does not allow for customization.

The screenshot shows the Apex Portal interface for processing a credit card transaction. The left sidebar contains navigation options: Wedding Client, Dashboard, REVPlay, Hosted Pay Forms, Virtual Terminal, My Terminal (selected), and Reporting. The main content area is titled "Transaction Details" and includes a form with the following sections:

- Transaction Details:** Amount \* (input field), Sales Tax (4.32 %), and Description (input field).
- Total \$0.00**
- Receipts:** Email Merchant Receipt  and Email Customer Receipt .
- Payment Information:** Credit Card  and eCheck . Includes Name \* (input field), Card Number \* (input field), and MM/YY \* CVC \* (input field). A virtual credit card image is displayed.
- Billing Information:** Email \* (input field), Phone (input field), Street Address \* (input field), Apt/Suite (input field), City \* (input field), State \* (dropdown menu), and Zip \* (input field).
- Shipping Information:** Same As Billing? .

At the bottom, there are two buttons: "PROCESS TRANSACTION" and "CANCEL".

The screenshot shows the Apex Portal interface for processing an eCheck transaction. The left sidebar is identical to the previous screenshot. The main content area is titled "Transaction Details" and includes a form with the following sections:

- Transaction Details:** Amount \* (input field), Sales Tax (4.32 %), and Description (input field).
- Total \$0.00**
- Receipts:** Email Merchant Receipt  and Email Customer Receipt .
- Payment Information:** Credit Card  and eCheck . Includes Account Holder Name \* (input field), Routing Number \* (input field), Account Type \* (dropdown menu), Account Number \* (input field), and Account Number Confirmation \* (input field). A virtual eCheck image is displayed.
- Billing Information:** Email \* (input field), Phone (input field), Street Address \* (input field), Apt/Suite (input field), City \* (input field), State \* (dropdown menu), and Zip \* (input field).
- Shipping Information:** Same As Billing? .

At the bottom, there are two buttons: "PROCESS TRANSACTION" and "CANCEL".

## Processing a Virtual Terminal Transaction

- Once on My Terminal, you can easily follow the steps/fields to complete a transaction.
  - Required fields are indicated with a '\*'.
  - When Sales Tax is entered, the Total will automatically be updated with the new 'Total'.
  - Sales Tax can be hardcoded at the Merchant level. Please submit a request to have the Sales Tax hardcoded.
  - Field validation rules are presented when a field is not properly completed.
  - Credit Card or eCheck – the applicable fields and the graphic will change based on your card number entry.
    - The credit card graphic will display name, card number, exp date, and CVC as they are entered.
  - To enter a separate Shipping Address, you should click on the 'Same as Billing?' checkbox. This will display the Shipping Address fields.
- Review all fields to ensure that all fields are accurate.
- Once all applicable fields are completed, select the **Process Transaction** button.

## Cash Discount

When Cash Discount is configured on, user will be displayed the 'Service Fee' amount in the Transaction Details section.

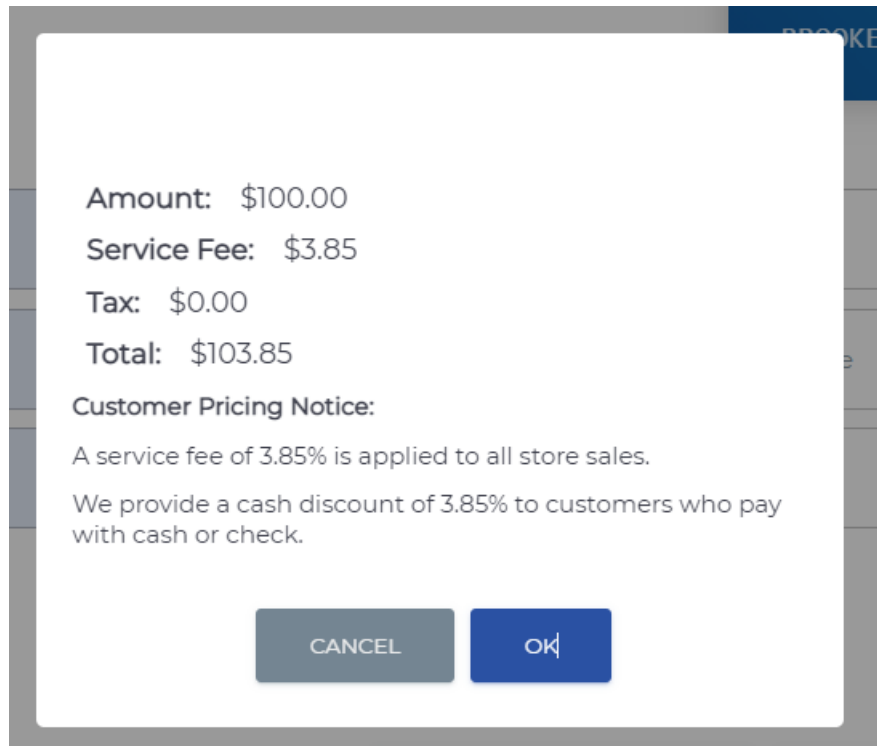
### Transaction Details

Amount *	100.00	\$	Sales Tax	8.25	%
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SERVICE FEE: \$3.85

Total \$112.42

User will be presented with the 'Service Fee' and Cash Discount verbiage on the confirmation modal prior to submitting the transaction. User will be presented with the 'Service Fee' on the payment confirmation page once the transaction is submitted.



Note: Cash Discount is configured by Support/Ops during onboarding, please see 'Merchant Utility Tool – Addition of Cash Discount' details.

## 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:

Thank you Brooke Davis, your payment has been received, see details below.

Payment Information:

Merchant Name: Product UAT Testing

Payment Date: Monday, 19 April 2021

Total Amount: \$103.85 USD

Payment Card Type: Visa \*\*\*\*\*8888

Transaction ID: 9293131



## Confirmation Page

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

If Cash Discount is applied, Service Fee will be a line item.

- Finish: To 'Finish' the transaction, select the Finish button.
- Print: To print your Payment Confirmation, select the Print button.

**Payment Accepted**

Thanks for your payment  
 Merchant Name: Product UAT Testing  
 Transaction ID: 9293131  
 Transaction Date: Monday, April 19, 2021

Amount:	\$100.00
Service Fee:	\$3.85
Subtotal:	\$103.85
Sales Tax:	\$0.00
<b>Total:</b>	<b>\$103.85</b>

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[FINISH](#) [PRINT](#)

## Voiding a Transaction

**Transaction 8998465**

[VOID](#) [PRINT RECEIPT](#) [BACK](#)

Sale  
**\$5,929.00**  
 Approved

**Transaction Information**

Merchant: Product UAT Testing  
 Transaction ID: 8998465  
 Status: Approved

Date: 04/05/2021 08:53:59 AM CST  
 Transaction Type: Sale  
 Settlement Status: Pending Settlement

**Credit Card Information**

CC Number: \*\*\*\* \* 8888  
 CC Type: Visa  
 Auth Code: TAS297  
 Currency: USD

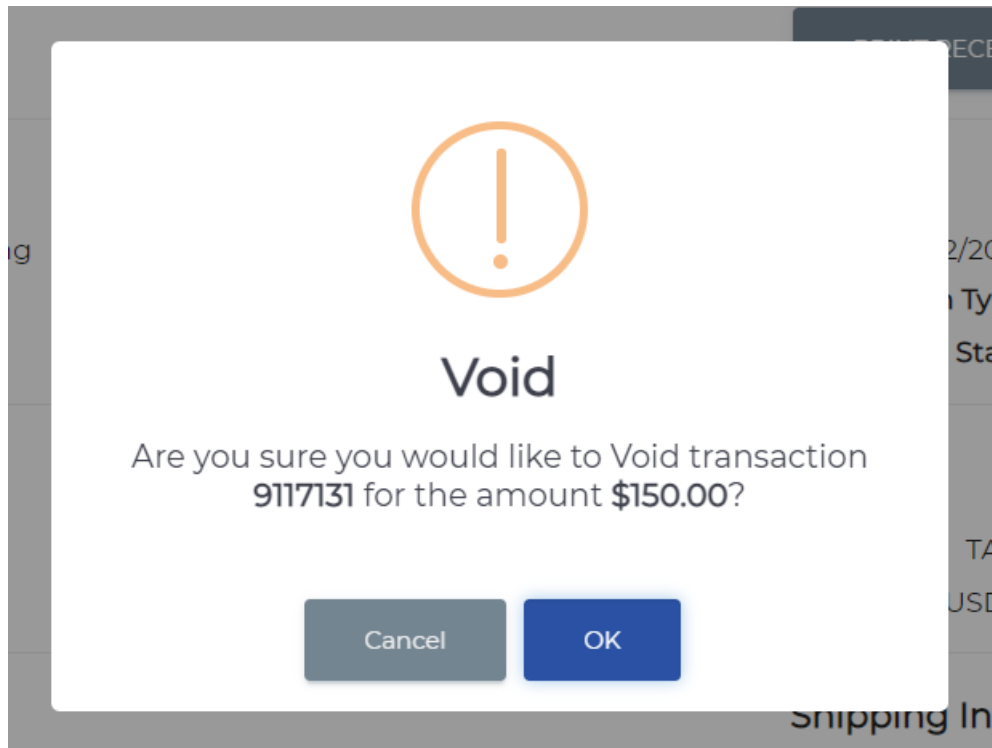
**Billing Information**      **Shipping Information**

Kimberly Gonzalez

**General Information**

Description:

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.