APEX | APEX

APEX Gateway
DASHBOARD
Date: 02/06/2024

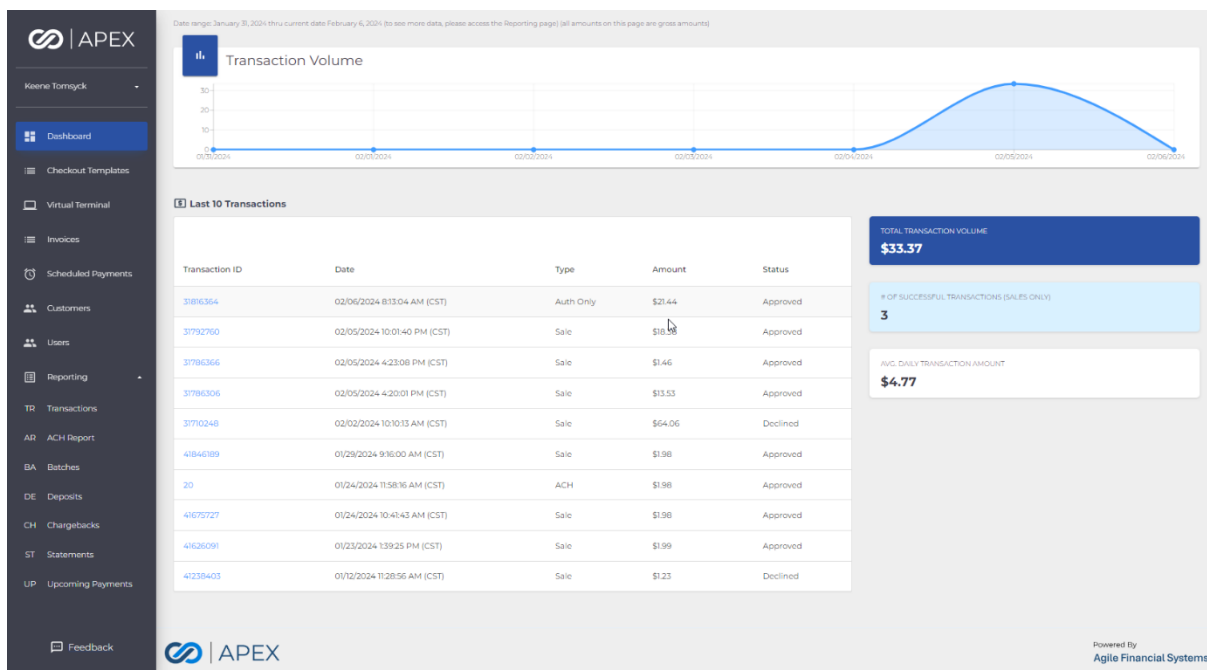# Table of Contents

Dashboard

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.

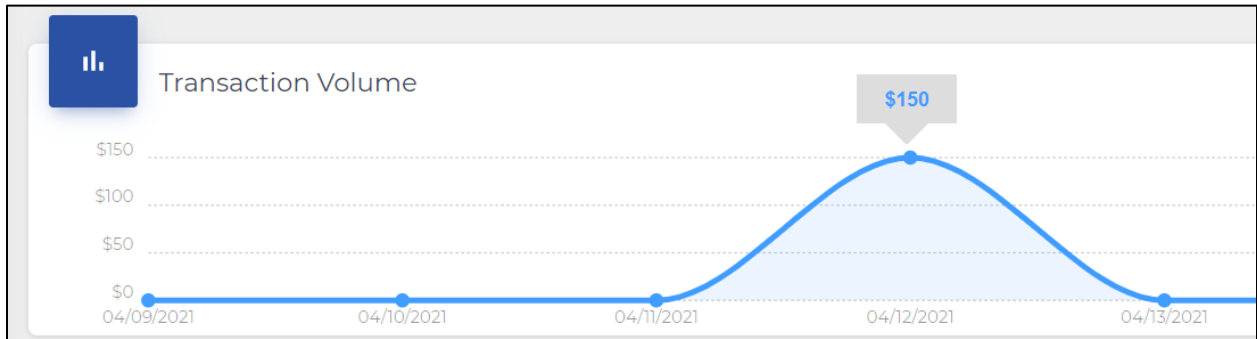This page is broken into multiple sections that each provide specific transactional information.

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.

Date range: April 8, 2021 thru current date April 14, 2021 (to see more data, please access the Reporting page) (all amounts on this page are gross amounts)

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 the most recent transactions completed are displayed. The transactions are sorted by the most recent on top.

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 Transaction Details, Void or Refund Transaction, or Capture/Void a pre-authorized sale**

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
- ACH

Transaction Amount

The **amount** of the processed transaction.

Status

The status of the transaction will display **Approved**, if processed, or **Declined**.

View Transaction Details

Void or Refund Transaction

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 and Email Receipt.**
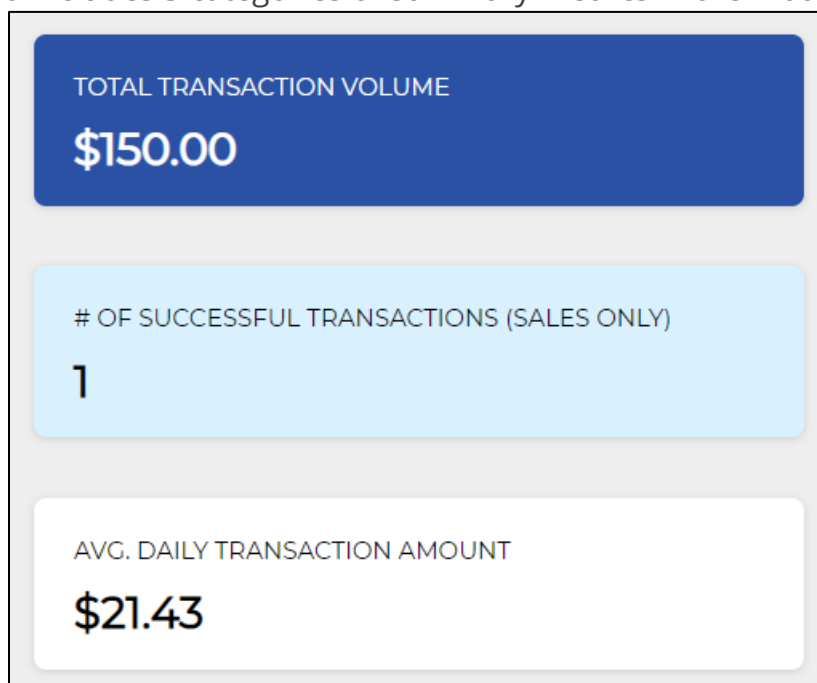
Capture/Void a pre-authorized sale

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.

Dashboard Summary

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

TOTAL TRANSACTION VOLUME
$150.00

OF SUCCESSFUL TRANSACTIONS (SALES ONLY)
1

AVG. DAILY TRANSACTION AMOUNT
$21.43

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.