CSG Forte

DEX QUICK REFERENCE GUIDE

Complete payments management

DEX REGISTRATION

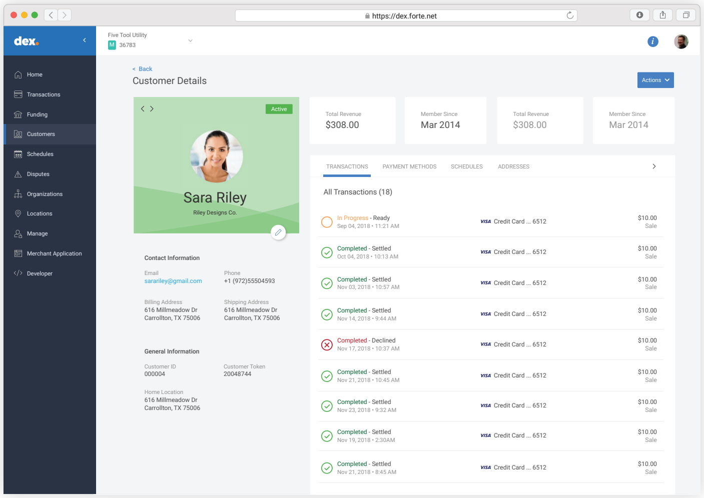
LET'S GET STARTED!

1. **Accept invitation** in the email invite (expires after 8 days)
2. **Complete registration**
   - Username is your email address
   - First and last name
   - Submit mobile phone number for SMS code verification
3. **Create password**
   - Minimum 8 characters, 1 numeric, 1 uppercase, 1 special character
4. Click the **I Agree to Terms and Conditions** check box and click **Register**
5. Click **Send for Dex** to send an SMS code verification to your phone
6. Enter six digit code on the Dex verification page and click **Verify**

Congratulations, you're now an official Dex user!

To login to Dex after completing registration, go to https://console.forte.net/login using your Chrome browser.

Enter the email address and password you registered with to log in.



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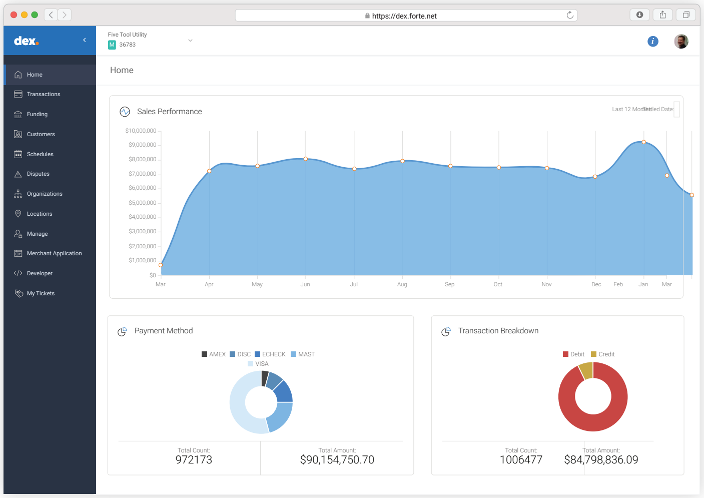
DASHBOARD



View our helpful graphs for a quick snapshot of your business that provides insight into:

Sales performance

Payment method

Settled transactions

Access the below icons in the top right corner of Dex from any module:

My Profile

Click the profile icon in the upper right corner to access your profile information, or to gain access to the sandbox environment.

Need more help?
Click here for a quick tutorial.

Info

Need more info? Click on this icon to review helpful information related to Dex including:

Getting Started Videos
Help Docs
Release Notes
Dev Docs

Notifications

Want to be notified when you receive new disputes in Dex? Navigate to the notification icon to subscribe to receive disputes notifications.

Need more help?
Click here for a quick tutorial.

OVERVIEW OF MODULES IN DEX PLATFORM

Transactions

Our transaction data grid provides detail on payment activity that has occurred within your organization. You can also make additional actions such as void or reverse a payment.

Customers

Oversee customer details by accessing the customer module, which allows you to add customer contact information, payment details, set up payment schedules, and much more.

Funding

Review your funding records and quickly identify all transactions associated to your funding which can be filtered using a date range based upon the funding effective date.

Manage

Manage your employee users who require access to Dex. You can invite your users and assign them roles and permissions according to your business needs.

Locations

Allows you to view details relevant to each location in your organization that you manage including:

- Business contact details
- Products and services
- Bank accounts
- Controller / owner Info

Developer

Your developers can manage API keys and Webhooks right in Dex, making it easy to manage one and two way data sharing with integrated applications.

Schedules

Do you need to set up recurring payment schedules for your customers? Use our schedules tool to enable schedules with flexible billing options.

Resources

Find more helpful resources on our support portal or by contacting our Support team via email or by phone at 866-290-5400 (Option 1).

Merchant FAQ

Disputes

Manage customer disputes using our dynamic disputes platform, which enables you to monitor chargeback statuses, upload documentation, and manage the full lifecycle of the disputes process in one convenient place.