1. Log in to your CSG Forte Dex platform.
2. On the left-hand side, Select **Transactions.**
3. Under the Details tab, adjust the time frame for the transactions you would like to search.
	1. i.e., 01/01/2023 ---> 06/06/2023



* 1. Click **Apply.**
1. At the top right-hand side of the screen, Select the Download button ().
2. A new display will populate with additional options to include in your transaction report before initiating the full download.



1. Click **Add a new column.**



1. Select **Attempt Number, Settlement Code Description, Settlement Date** and **Settlement Response Code.**



1. Move the four additional codes up the list using the 6 dots to the left of the description item to your preference for reconciling the data.



1. Here is an example of a adjustment of the description items to better reconcile the information.



1. Click **Download.**



1. A notification will present itself at the top right of the site indicating that your document is ready to be downloaded.
	1. The document will load at the bottom left of your screen in a csv. Excel document.
	2. You can also access the documents you have requested to download in the **Downloads** tab located by the **Details** tab.



1. Once the document has been opened in Excel, the best practice would be to highlight the description item fields that were added.



1. To view transactions that have funded on the second or third attempt:
	1. Select the triangle between Column A and Row 1. This will grey the entire spreadsheet, showing it has all been selected.
	2. At the top right of the toolbar, Select **Sort & Filter,** then **Filter.**
	3. You now can filter through each column depending on the information you would like to see.
	4. Column F contains the **Attempt Number,** this can be filtered to show the 2nd and 3rd attempts.



* 1. You now can filter by specific customer in column(s), **J, K** and **L** (Bill to First Name, Bill to Last Name, and Company Name).
	2. For this example, CSG Forte filtered by John Smith and cleared the Attempt Number Filter to include 1st attempts.
	3. Columns **F, G,** and **H,** indicate the attempt number, response code and response code description. Notice on the 3rd attempt, a response code of **S03** was received, indicating it was Successfully funded on the 3rd attempt.
	4. \*In the example above, the dates are arranged by oldest to newest and the Received Date and Settlement Date correlate to each other.\* (Subject to change)
	5. To confirm that these transactions relate to each other, in Column S, Authorization Info, the authorization numbers are the same.

