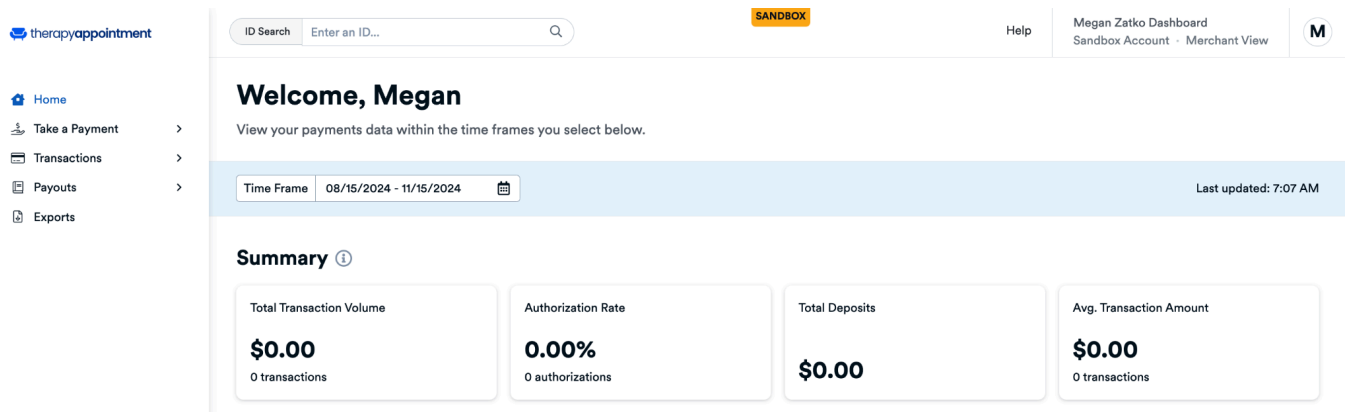# therapyappointment

Navigating Your Finix Dashboard:
The Basics

From your dashboard, you can:

✔ View activity, individual transactions, and other payment data

✔ Track settlements and deposits to your account

✔ Track disputes and refunds

✔ Manage practice members and permissions (*group practice feature*)

✔ Create and view authorizations

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| ID Search | Enter an ID... 🔍 | SANDBOX | Help | Megan Zatko Dashboard Sandbox Account · Merchant View | M |

🏠 Home
⚖ Take a Payment ›
▭ Transactions ›
▭ Payouts ›
▭ Exports

Welcome, Megan

View your payments data within the time frames you select below.

| Time Frame | 08/15/2024 - 11/15/2024 📅 | Last updated: 7:07 AM |

Summary ⓘ

Total Transaction Volume	Authorization Rate	Total Deposits	Avg. Transaction Amount
$0.00	**0.00%**	**$0.00**	**$0.00**
0 transactions	0 authorizations		0 transactions

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Your Dashboard

Your dashboard is organized into four sections - Take a Payment, Transactions, Payouts, and Exports.

Transaction Insights	Payments
● View all of your transactions, including payments, refunds, and authorizations	● View details for each payment your practice has processed in chronological order ● View successful and unsuccessful payments
Authorizations ● View pending, past, and canceled authorizations ● View failed authorizations and why ● Create an authorization	Refunds ● View all refunds ● Monitor pending refunds
Disputes ● Get an at-a-glance view of your disputes and their status ● Manage individuals disputes	

Payouts

Settlements	Deposits
● View all of your processed transactions together in one place ● For each settlement, view payout profile, an overview of how the settlement is broken down, and the associated funding transfer	● View past and pending deposits ● Click into individual deposits to see details and the associated settlement ● Compare what's been settled vs. what's been deposited

Exports

Here you can Download CSV files that you've created.

Managing Your Account

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Business Info ● View your practice information	**Files** ● Complete and upload important files, such as PCI compliance documents
Team ● Add, edit, or remove practice members and manage account permissions	**Compliance** ● View when compliance docs are due and attest your PCI compliance with pre-populated forms
Payment Instruments ● View bank account information for your payouts	**Resources** ● Download useful resource files

Here you can manage your Profile, Permissions, and Passwords.
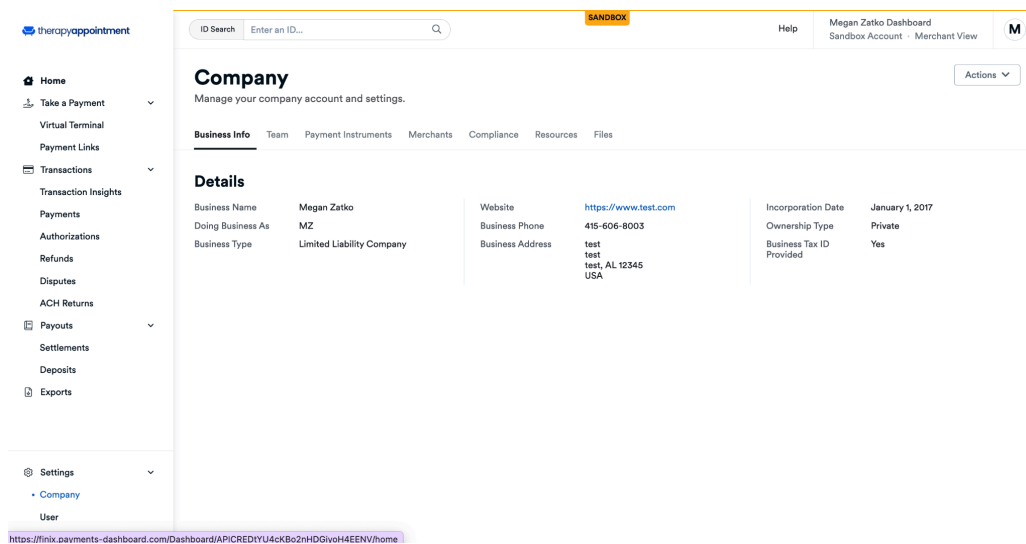
Performing Common Dashboard Actions

You can use your dashboard to perform various actions across your payment workflows, including:

Searching for individual entries

Need to refer back to a specific transaction, payout, or exception? Use the ID Search bar at the top of every page and enter the ID associated with that entry. Or go to Transactions in your left menu and select Payments to locate the exact item you're looking for.

Sorting and filtering your data

Your dashboard includes filters and controls to help you sort and organize your practice's data, including compiling payment data by date, status, and properties.

Generating custom CSV exports

You can filter and export payment data into downloadable CSV reports:

- Use filters to compile the exact data you want to export
- Click the Export All button at the top right
- Confirm which fields you want to export for each data set and click the Initiate Export button
- In the Exports section (in the left menu of your dashboard) track the progress of each report and download

Attesting PCI Compliance

1. In your dashboard, click Settings at the bottom left

2. Next, go to *Company > Compliance*

3. Select on the due compliance form

4. Click Unsigned PDF to review the form

5. After you've reviewed the form for accuracy, click the Attest Compliance Form button

6. Enter your name and title to sign and submit

7. After submitting the form, a signed PDF link will appear

Managing practice members and role

Administrator accounts for your practice's dashboard can manage role-based permissions.

> **Adding a practice member**

1. Click Settings at the bottom left of your dashboard

2. Next, go to *Company > Team*

3. Click the Add New Team Member button

4. Enter a name and email for the new team member you're adding

5. Select their role and click Add Team Member

6. Your new practice member will receive an email to access their account

> **Removing a practice member**

1. Click Settings at the bottom left of your dashboard

2. Next, go to *Company > Team*

3. Click on the team member that you want to deactivate

4. On the page for that team member, click the Actions button at the top right

5. Click Deactivate Team Member and confirm to complete

Changing a member's role

1. Click Settings at the bottom left of your dashboard

2. Go to *Company > Team and* select the team member's role you want to edit

3. On that team member's page, click the Actions button in the top right corner

4. Click Edit Team Member Role

5. Select or customize the role you want to assign to their account

6. Click the Edit Team Member Role button to update their account's role

Creating a custom role

1. Click Settings at the bottom left of your dashboard

2. Next, go to *Company > Team* and click Create Custom Role

3. Enter the name and description for the custom role

4. Enter a name and description for the role that you are creating

5. Configure your desired permissions for the new account role

6. Click the Add Team Member button to complete

Editing existing roles

1. Click Settings at the bottom left of your dashboard

2. Next, go to *Company > Team*

3. Click the Actions button at the top right

4. Click Edit Team Member Role and select a team member

5. Edit their role

6. Click the Edit Team Member Role button to complete

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