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APEX Gateway

# HOSTED PAY FORM

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## Different Types of Hosted Pay Forms

There are multiple types of hosted pay forms that you may want to use for different reasons. In this document you will find the different types, how each type can be used, and screenshots of what your customer will see on each page/tab.

*NOTE:* The LOGOs on the pages will be configured by you or your development team. The screenshots below are examples only.

### Donation Form

The donation form is used if you want to accept funds without giving a dollar amount. Within the URL that your developer builds there will be a section **&details=** with a value at the end of it. If there is no dollar amount following the = on the url, no dollar amount will be required.

If you set up the form as a donation, the customer view will look like:



Please check out our awesome payment form!

If you have any questions, please contact us at <https://www.contactus.com/help>.

A screenshot of a payment form interface. On the left, a vertical progress bar shows four steps: 1. Payment Info (active), 2. Billing Info, 3. Shipping Info, and 4. Payment Details. The 'Payment Info' section contains two input fields: 'Payment Amount' with a dollar sign icon and 'Invoice Number' with an information icon. A blue 'CONTINUE' button is positioned below the 'Payment Amount' field.

CANCEL

Thank you for your patronage!

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Note that there is no payment amount prepopulated, and the customer can enter in whatever value they want to donate.

## Full or Partial Payment

In the URL for full or partial payment, your developer will include a dollar amount in the details section. This will populate a total amount for the customer. (For more information refer to Managing Hosted Payment Form Document)

On the hosted pay form setup in the gateway, you will need to decide if you want to allow partial payment and full payment. If you would like to allow both, then the template configuration for “allow partial pay” must be set to active.

Template Name  
test 1 HPF

Upload a Logo

Redirect URL

Cancel URL

Header

Footer

**\$** Payment Information

Label for Amount Owed  
Total Amount

Allow Partial Pay

Add Custom Field

Email Merchant Receipt

Billing Information

Shipping Information

Card Information

For your customer, it will look like this:



Please follow the steps and provide the following information to complete your payment.

A screenshot of a payment form interface. At the top, it displays 'Total Amount: \$24.57'. Below this is a vertical progress indicator with four steps: '1 Payment Info', '2 Billing Info', '3 Shipping Info', and '4 Payment Details'. The '1 Payment Info' step is active and contains a text input field with a dollar sign icon and the label 'Payment Amount'. Below the input field is a blue 'CONTINUE' button. The other steps are inactive and shown in a lighter grey color.

CANCEL

Thank you for your patronage!

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Note that the total amount and the payment amount fields are visible. The payment amount field allows the customer to enter in any number less than the total amount owed as payment.

## Full Payment Only

If you want to allow the customer to pay only the full amount due, then you will need to set the dollar amount due in the URL Details section, and the option “allow partial pay” on the template configuration must be unchecked.

Note: When setting the payment amount, you must set/pass an amount  $\geq$  \$1.00 and  $\leq$  \$99,999.00

The screenshot displays the APEX configuration interface for a hosted pay form. On the left is a dark sidebar with the APEX logo and navigation menu items: Product Team UAT, Dashboard, Hosted Pay Forms (highlighted), Virtual Terminal, Scheduled Payments, Customers, Users, Reporting, and Feedback. The main area shows the configuration for a template named "test 1 HPF". It includes fields for "Redirect URL" and "Cancel URL", and text boxes for "Header" and "Footer". The "Payment Information" section is expanded, showing a "Label for Amount Owed" field with the value "Total Amount" and a checked "Allow Partial Pay" checkbox. Other options include "Add Custom Field" and "Email Merchant Receipt". Below are sections for "Billing Information", "Shipping Information", and "Card Information", each with a dropdown arrow.

Here you can see that the Total Amount Due is populated, and the payment info section only has an option for an invoice number. This is to show the customer that they can only pay the default shown above and are able move on to the billing/shipping/card info tabs.



Please follow the steps and provide the following information to complete your payment.

Total Amount: \$24.57

1 Billing Info

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

E-mail \_\_\_\_\_

Address 1 \_\_\_\_\_ Address 2 (optional) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

CONTINUE

2 Shipping Info

3 Payment Details

CANCEL

Thank you for your patronage!

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## Sending a Receipt Email to the Merchant

If you want to have an email receipt sent to the merchant for an approved transaction, check the Email Merchant Receipt box.

**APEX**

Product Team UAT

Dashboard

Hosted Pay Forms

Virtual Terminal

Scheduled Payments

Customers

Users

Reporting

Feedback

### Hosted Pay Form Configuration

Template Name: test 1 HPF

Upload a Logo

Redirect URL

Cancel URL: <https://go-afs.com/>

Header

Footer: Thank you for your patronage!

**\$ Payment Information**

Label for Amount Owed: Total Amount

Allow Partial Pay

Add Custom Field

**Email Merchant Receipt**

Billing Information

Shipping Information

Card Information

## Gather Customer Information

If you want to gather payment information from a customer – check the **Gather Payment Information for Customer Wallet** checkbox. This will create a Hosted Pay Form that will allow a customer to enter billing, shipping, and payment information but will not complete a payment transaction.



The payment information entered here will be added to the customer's wallet and can be used to create Scheduled Payments.

If the email entered does not match an existing customer – a new customer record will be created and the payment information will be added to the wallet.

**+** Create A New Hosted Pay Form Template

Product Team

- Dashboard
- Hosted Pay Forms**
- Virtual Terminal
- Scheduled Payments
- Customers
- Users
- Reporting

Template Name  
Gather Payment Info

Upload a Logo

Redirect URL Cancel URL

Header

Footer

\$ Payment Information

Gather Payment Information For Customer Wallet

*ⓘ* This option allows the form to collect payment information used to create a Recurring Payment. The form will not function as a standard hosted pay form with this option enabled.



Please follow the steps and provide the following information to complete your payment.

1 Billing Info

2 Shipping Info

3 **Payment Details**

Card Number  Enter with no spaces

Expiration  MMYY

VISA

CVC/CVV  XXX

I'm not a robot

reCAPTCHA

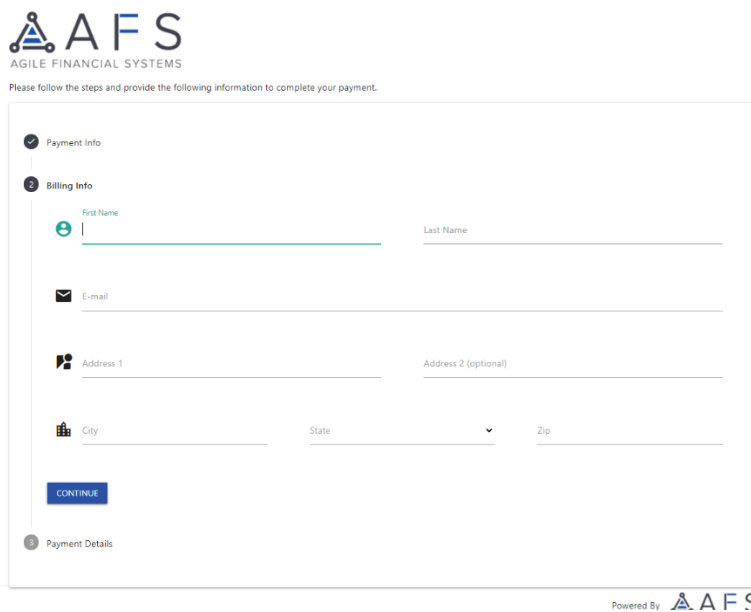
Privacy Terms

**SUBMIT**

\* The entered payment information will be stored in a wallet for use in future transactions.

## Billing Info Section

Once the customer has clicked **continue** from the main page, they will be prompted to enter their billing information. The screen they see will look like:



The screenshot shows the AFS (Agile Financial Systems) payment form. At the top, the AFS logo and the text "AGILE FINANCIAL SYSTEMS" are displayed. Below the logo, a message reads: "Please follow the steps and provide the following information to complete your payment." The form is divided into four steps: 1. Payment Info (checked), 2. Billing Info (active), 3. Address Info, and 4. Payment Details. The Billing Info section contains the following fields: First Name, Last Name, E-mail, Address 1, Address 2 (optional), City, State (dropdown), and Zip. A blue "CONTINUE" button is located below the fields. The form is powered by AFS, as indicated by the text "Powered By AFS" at the bottom right.

Here you can see that the total amount due is always visible so there are no questions on the dollar amount when going from one page to another. Your customer will then fill in this page with their own Billing Information. *NOTE:* The email address entered here is where the receipt for the transaction will be sent.

## Shipping Info Section

Under the shipping info your customer will be prompted to enter their shipping information and the page will look like:



Please follow the steps and provide the following information to complete your payment.

Total Amount: **\$24.57**

✓ Payment Info

✓ Billing Info

3 Shipping Info

Use the same as Billing Info

Address 1  Address 2 (optional)

City  State  Zip

**CONTINUE**

4 Payment Details

**CANCEL**

Thank you for your patronage!

Powered By

Here you can see that the total dollar amount due remains visible during the shipping tab process as well. At the top of the tab there is a checkbox asking if the shipping address is the same as billing. If this box is checked, then all billing address information will populate on the shipping tab and the customer can continue to card info tab.

## Payment Screen

The final page your customer will need to fill out payment information – in the form of a credit card or eCheck. The total amount due is always visible.

Note: The way the merchant is setup in the Merchant Utility Tool is based on what payment methods they can accept and that will determine what payment options



When Cash Discount is configured on, user will be displayed the 'Service Fee' amount in the Card Info section as well as the Cash Discount verbiage on the Hosted Pay Form.

**4 Payment Details**

Pay with eCheck

Paying: \$100.00  
Service Fee: \$3.85 \*  
**Total Amount: \$103.85**

Card Number  
Enter with no spaces

Expiration  
MMYY

CVV/CVV2  
XXX

I'm not a robot

RECAPTCHA  
Privacy - Terms

SUBMIT

\* **CUSTOMER PRICING NOTICE:** A service fee of **3.85%** is applied to all store sales. We provide a cash discount of **3.85%** to customers who pay with cash or check.

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

**AFS**  
AGILE FINANCIAL SYSTEMS

## Payment accepted.

Thank you for your payment!

Transaction ID: 9205853  
Amount: \$100.00  
Service Fee: \$3.85 \*  
Total Amount: \$103.85

\* **CUSTOMER PRICING NOTICE:** A service fee of **3.85%** is applied to all store sales. We provide a cash discount of **3.85%** to customers who pay with cash or check.

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AGILE FINANCIAL SYSTEMS

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

# Captcha

To complete the payment process, the customer will need to complete Captcha.

