



APEX Gateway
CUSTOMERS

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Customers

In the APEX Gateway, you can create and manage customer records.

From the Customer list page, you can view information on all customers that have been created

Customer ID	Customer Name	Email	Phone	Card on File	eCheck on File	Customer Status	Actions
327	Chocolate Crumb Pie	estchocolatepie@gmail.com	+1 (555) 444-7777	No	No	<input checked="" type="checkbox"/> Active	⋮
328	Chocolate Crumb Pie	estchocolatepie@gmail.com	+1 (555) 444-7777	No	No	<input type="checkbox"/> Active	⋮
1428	Daniel Rojas Jr.	daniel.rojas@rev19.net		No	No	<input checked="" type="checkbox"/> Active	⋮
1430	Daniel Rojas Jr.	daniel.rojas@ggo-afs.com		No	No	<input checked="" type="checkbox"/> Active	⋮

Managing Customer List Page

Columns

- Customer ID
 - System assigned unique identifier
- Customer Name
- Email
- Phone
- Card on File
 - Displays Yes/No depending on if the customer has a credit card saved on their profile
- Customer Status
 - Active/Inactive toggle
- Actions
 - For Active customers, there is an Edit option

- For Inactive customers, there is a View option

Filter

By default, the Customer List will display all Customers.

Filtering the list can be done by selecting the **Filters** dropdown. Filter By options include:

- Customer ID
- Name

Sort By

By default, the Customer List is sorted by Customer name. The sorting can be changed by selecting the sorting icon on the column name (at the top of each column) for any of the columns.

Columns Management

By default, all available columns will display. By selecting **Columns**, you can remove any columns.

Row Spacing

By selecting **Compact**, the row height will minimize to display more rows.

Export

To better manage and manipulate customer information, exporting is available.

- CSV file: To export report to CSV, select the CSV icon button on the top right of the page.
- Excel file: To export report to Excel, select the Excel icon button on the top right of the page.

The file will immediately download to the computer. Simply open and manage/manipulate information.

Add New Customer

To create a new customer, you can select **Add a New Customer** from the Customer list page.

The screenshot shows the 'Add A New Customer' form in the APEX system. The form is divided into two main sections: 'General Info' and 'Wallet'. The 'General Info' section contains input fields for Customer Name, Email, Phone, Address, Apt/Suite, City, State, and Zip Code. The 'Wallet' section contains two tables: 'Credit Cards' and 'ACH Accounts'. Both tables are currently empty, showing 'No records to display'. There are buttons to '+ Add New Credit Card' and '+ Add New ACH Account'. The interface includes a sidebar with navigation options like Dashboard, Hosted Pay Forms, Virtual Terminal, Scheduled Payments, Customers, Users, and Reporting. The top right has 'CREATE CUSTOMER' and 'CANCEL' buttons. The footer shows 'Powered By AFS'.

General Info

Each Customer profile contains the following information:

- Customer Name - Required
- Email - Required
- Phone - This field is optional
- Address - Required
- Apt/Suite - This field is optional
- City - Required
- State - Required
- Zip Code - Required

Add a New Credit Card

To add a new credit card as payment type in the customer's wallet, select **Add New Credit Card** under the Wallet section.

In this pop-up, by Default the Card Holder Name will be pre-populated with the customer's name and the Billing Information will be pre-populated with the customer's address.

You will need to enter:

- Credit Card Number
- Expiration Date
- CVC

The **Set as Default** checkbox will set the credit card as the default payment option for the customer.

Add New Credit Card

Card Information

Name *
Acott Summers075

Card Number * MM/YY * CVC *

Set as Default

Billing Information

Street Address *
1 ljk

Apt/Suite

City *
lks

State *
Alabama

Zip *
12345

Shipping Information

Same As Billing?

CANCEL SAVE

Add a New ACH Account

To add a new ACH account as payment type in the customer's wallet, select **Add New ACH Account** under the Wallet section.

In this pop-up, by Default the Account Holder Name will be pre-populated with the customer's name and the Billing Information will be pre-populated with the customer's address

You will need to enter:

- Routing Number
- Account Type
 - Savings or Checking
- Account Number
 - Needs to be entered a second time for confirmation

The **Set as Default** checkbox will set the ACH account as the default payment option for the customer.

Add New ACH Account

ACH Info

Account Holder Name *

Routing # * Account Type *

Account # * Account # Confirmation *

Set as Default

Billing Information

Street Address * Apt/Suite

City * State * Zip *

Shipping Information

Same As Billing?

CANCEL SAVE

Check Preview:

NAME ADDRESS CITY, STATE ZIP 0123 0123456789
DATE \$
PAY TO THE ORDER OF \$
BANK NAME ADDRESS CITY, STATE ZIP
FOR
0123456789 01234567890123 0123
Routing Number Account Number

Customer Management

Update Credit Card

When editing an existing customer, you have the ability to update the following fields on existing credit cards:

- Expiration Date
- Billing Information
- Shipping Information

Update ACH Account

When editing an existing customer, you have the ability to update the following fields on existing ACH accounts:




- Billing Information
- Shipping Information

Delete Payment Type

You have the ability to delete a payment method by selecting the action button (vertical ellipsis) for the row containing the payment method you wish to delete and choose the Delete option.

Wallet

Credit Cards

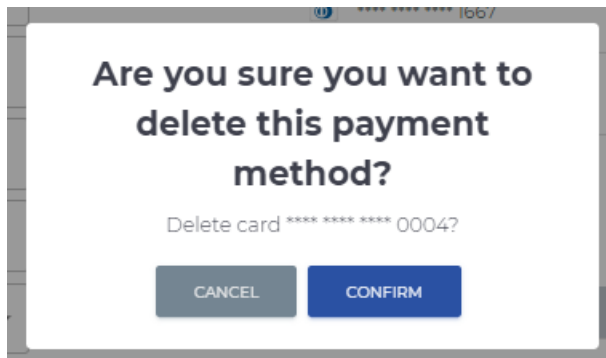
Card Number	Expiration	Cardholder Name	Default	
 **** * 0004	12 / 21	Ab Test121345	<input checked="" type="checkbox"/>	⋮
 **** * 1667	12 / 21	Ab Test121345	<input type="checkbox"/>	⋮
 **** * 1667	12 / 21	Ab Test121345	<input type="checkbox"/>	⋮

[+ Add New Credit Card](#)

ACH Accounts

Account Holder Name	Account Type	Routing #	Account #	Default	
Ab Test1213456	Savings	XXXXX6789	XX3456	<input type="checkbox"/>	⋮

[+ Add New ACH Account](#)



Transaction History

View details on previous transactions that have been run for the selected customer.

- Transaction #
- Date
- Type
- Amount
- Result
- Error – populates with the error message received if the transaction failed

Upcoming Payments

- View details on the next 10 payments for the selected customer.

HPF Gather Payment Information

Merchants can create Hosted Pay Forms that will gather customer payment information for the customer wallet