



APEX Gateway

MANAGING HOSTED PAY FORMS

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Viewing Your Hosted Pay Forms in the Apex Gateway

To view a list of all your hosted pay forms, select the Hosted Pay Forms menu option. On the Hosted Pay Forms Templates page, there is a list of all the existing Hosted Pay Forms on your account.

NOTE: If this is your first time using our Apex Gateway to manage your Hosted Pay Forms, you may not have any Pay Forms created on your account at this time. If that is the case, refer to the Create Hosted Pay Forms section to create your first Hosted Pay Form.

Template #	Name	Created Date	Last Modified Date	Status	Actions
1	Agent Demo	10/06/2021		Active	
2	new template f	08/04/2021	08/05/2021	Active	
3	<default>	05/21/2021	06/30/2021	Active	
4	test 10	05/10/2021	08/04/2021	Active	
5	TEST	04/19/2021	05/10/2021	Active	
6	test 1 HPF	03/01/2021	03/04/2021	Active	

From the list you can easily view:

- The status of the Hosted Pay Form
- Created Date
- Modified Date
- Hosted Pay Form Template Name

By default, the templates are sorted by Created Date most recent first. The sorting can be changed by selecting the sorting icon on the column name for the Name, Created Date, and Modified Date columns.

To manage your Hosted Pay Forms, refer to the following sections:

- [Activating and Inactivating Hosted Pay Forms](#)
- [Creating a Hosted Pay Form](#)
- [Editing a Hosted Pay Form](#)
- [Grabbing the Hosted Pay Form Link](#)
- [Deleting a Hosted Pay Form](#)

Activating and Inactivating Hosted Pay Forms

To activate or inactivate a Hosted Pay Form, select the status toggle.

- Blue colored toggle is active
- Grey colored toggle is inactive

If a Hosted Pay Form has been deactivated, anyone who has the link to the Hosted Pay Form will be directed to a 404 Not Found page as the page no longer can be accessed.

If a Hosted Pay Form has been activated, anyone who has the link to the Hosted Pay Form will be able to access the Hosted Pay Form to pay.

Types of Hosted Pay Forms

There are three main types of hosted pay forms: Donation, Full or Partial Payment, and Full Payment Only. Below is info on each of the three main 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>.

1 Payment Info

\$ Payment Amount

i Invoice Number

CONTINUE

2 Billing Info

3 Shipping Info

4 Payment Details

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 Form

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 tx hf

Upload a Logo 

Redirect URL

https://apex.dev2.rev19.net Cancel URL

Header

Test header

Footer

Test footer

\$ Payment Information ^

Label for Amount Owed

150

Allow Partial Pay

Add Custom Field

📄 Billing Information v

🚚 Shipping Information v

📄 Card Information v

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'. A blue 'CONTINUE' button is positioned below the input field. At the bottom of the form, there is a blue 'CANCEL' button.

Thank you for your patronage!

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Note: 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 Form

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

AP EX

Product Team UAT

Dashboard

Hosted Pay Forms

Virtual Terminal

Scheduled Payments

Customers

Users

Reporting

Feedback

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 v

Shipping Information v

Card Information v

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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Creating a Hosted Pay Form

On the Hosted Pay Form Templates list page, select the Create a Hosted Pay Form button.

On the Create a Hosted Pay Form page, all fields are optional to fill in except for the Template Name. The Template Name must be filled in to create the Hosted Pay Form.

Note: It is not allowed to have the same Template Name for more than one Hosted Pay Form. You must use a unique Template Name for every Hosted Pay Form.

The screenshot shows a web-based configuration interface titled "Hosted Pay Form Configuration". At the top right, there are two buttons: "X: EXIT" and "SAVE". The main content area includes several input fields and sections:

- A "Template Name" input field with a red border and a red error message below it: "The name field is required."
- An "Upload a Logo" button with a small icon.
- Two input fields for "Redirect URL" and "Cancel URL".
- A "Header" input field.
- A "Footer" input field.
- A section titled "\$ Payment Information" with a dropdown arrow. It contains:
 - A "Label for Amount Owed" dropdown menu.
 - A "Total Amount" input field.
 - An "Allow Partial Pay" checkbox.
 - An "Add Custom Field" checkbox.
- Three expandable sections with dropdown arrows:
 - "Billing Information"
 - "Shipping Information"
 - "Card Information"

Refer to the [Hosted Pay Form Configuration Options](#) section to configure the Hosted Pay Form as desired.

To save, select the Save button.

To cancel, select the Exit button. This will not save any changes and return you to the Hosted Pay Form Templates listing page.

Hosted Pay Form Configuration Options

Upload a Logo

By default, the logo will be the AFS logo, to change the logo upload a logo that falls within the following guidelines.

- Image Dimensions: Height 150 pixels by Width 500 pixels.
- Image Size: 500 kb.
- Image File Types: *.jpeg, *.jpg, and *.png.

Redirect URL

This is for the Finish button on the payment confirmation page. When a customer selects the Finish button, the customer will be redirected the URL configured for Redirect URL.

If the Redirect URL is not configured (is null), the Finish button will not display. The customer must exit the page by closing their browser or browser tab.

Note: URL must start with: HTTP/HTTPS

Cancel URL

This is for the Cancel link on the Hosted Pay Form, to allow the customer to exit out of the pay form if they do not want to pay yet. When the customer selects the Cancel link, they will be redirected to the URL configured for Cancel URL.

If the Cancel URL is not configured (is null), the Cancel link will not be available for the customer. The customer must exit the page by closing their browser or browser tab.

Note: URL must start with: HTTP/HTTPS

Header Text

The Header text will display below the Logo and above the Hosted Pay Form.

You can enter any text you would like in the Header field to configure the text customers will see when viewing the Hosted Pay Form. This field allows for multi-line text. If there is no text set for the Header, the Header will display the default text, "Please follow the steps and provide the following information to complete your payment."

Note: The header text can contain up to 255 characters.

Footer Text

The Footer will display below the Hosted Pay Form.

You can enter any text you would like in the Footer field to configure the text customers will see when viewing the Hosted Pay Form. This field allows for multi-line text. If there is no text set for the Footer, the Footer will not display.

Note: The header text can contain up to 255 characters.

Label for Amount Owed

The label for the amount owed or the amount sent in the URL query parameter is customizable. By default, the label is 'Total Amount'.

- To change the Label for Amount Owed, expand the Payment Information section if it is not already expanded.
- Select into the Label for Amount Owed field and change the label to the desired label text.

Note: The text can contain up to 23 characters.

Allowing for any payment amount (Donation form)

To allow customers to make a donation of any amount, the finished url your developer includes on your web page or email should include an empty "details"

section with no dollar amount. An example is: **&details=** This is handled outside the APEX Gateway.

Allowing Partial Payments

By default, the Hosted Pay Form will force the customer to pay the full amount owed unless the Hosted Pay Form is a donation page. To allow customers to make partial payments, the Allow Partial Payments options must be enabled.

- To enable Partial Payments, expand the Payment Information section if it is not already expanded.
- Select the Allow Partial Payments checkbox.
 - If the checkbox is marked, it is enabled.
 - If the checkbox is unmarked, it is disabled.

Adding a Custom Field

If you need a field on the Hosted Pay Form to allow customers to fill in when making payments, you can enable a custom field to display on the Hosted Pay Form. This could be used to capture perhaps a patient name or invoice or statement number.

There is an option to set the Custom Field to be required or optional. If the Custom Field is set as required, the customer will be forced to fill in the field when making a payment. The Custom Field value the user enters is displayed on the Transaction Details view under General Information with the label "Description":

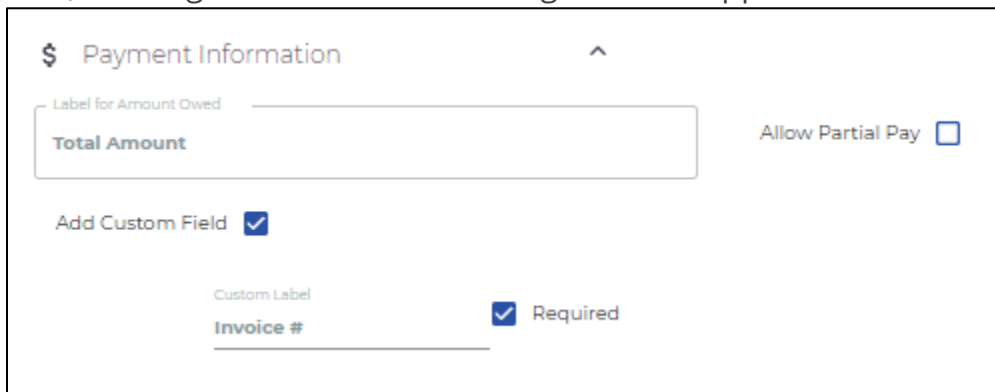


The screenshot shows a transaction details view with two sections. The top section is titled "General Information" and contains a "Description" field with the value "123456A". The bottom section is titled "Transaction History" and is currently empty.

- To enable a Custom Field on the Hosted Pay Form, expand the Payment Information section if it is not already expanded.
- Select the Add Custom Field checkbox to enable it.
 - If the checkbox is marked, it is enabled,
 - If the checkbox is unmarked, it is disabled.

- Once enabled, there will be two configurations that will display.
 - Custom Label field: this allows you to configure the label for the custom field.
 - Required checkbox: this allows you to configure the custom field as required or optional. To make the custom field required, enable the Required option.

Example: If “Invoice #” is the desired label value and the field is to be a required field, that segment of the form dialogue would appear as follows:

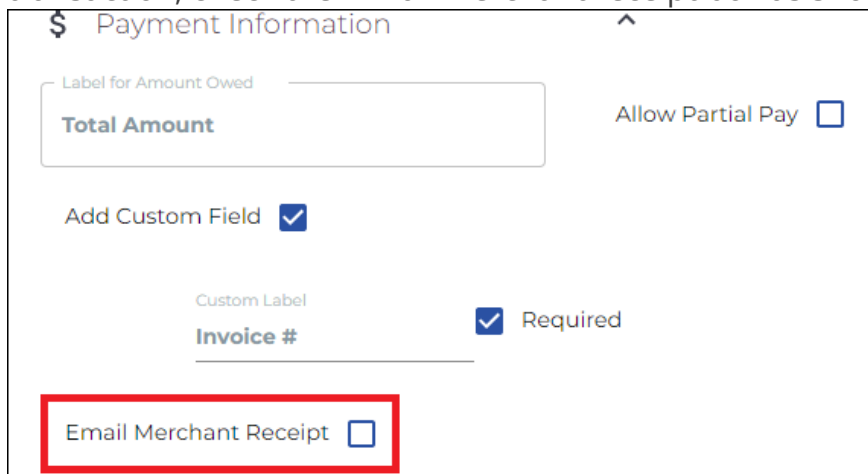


The screenshot shows a form titled "\$ Payment Information" with an expand/collapse arrow. It contains a text input field for "Label for Amount Owed" with the value "Total Amount" and an "Allow Partial Pay" checkbox. Below this is an "Add Custom Field" checkbox which is checked. Underneath, there is a "Custom Label" field with the value "Invoice #" and a "Required" checkbox which is also checked.

Note: The maximum custom field value allows is 70 characters.

Emailing the Merchant a Receipt

If you want an email receipt to be sent to the merchant upon a successful transaction, check the “Email Merchant receipt box as shown.



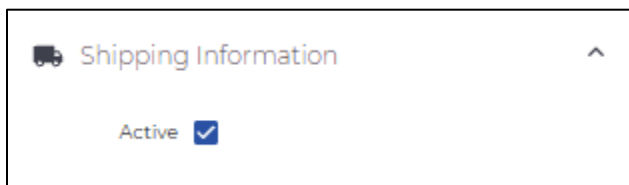
This screenshot is identical to the previous one, but with a red rectangular box highlighting the "Email Merchant Receipt" checkbox at the bottom of the form, which is currently unchecked.

Adding a Shipping Section

By default, the Hosted Pay Form does not have the Shipping section available. If Shipping section is enabled, the shipping fields will be required to be filled in when making a payment.

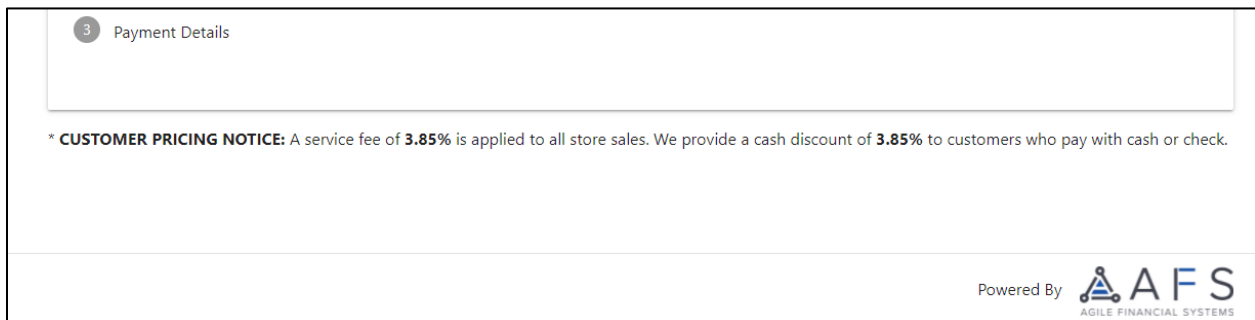
- To enable the Shipping section on the Hosted Pay Form, expand the Shipping Information section if it is not already expanded.
- Select the Active checkbox to enable the Shipping section.
 - If the checkbox is marked, it is enabled.
 - If the checkbox is unmarked, it is disabled.

Below is how the Shipping Information section appears if expanded and defined as Active/enabled:



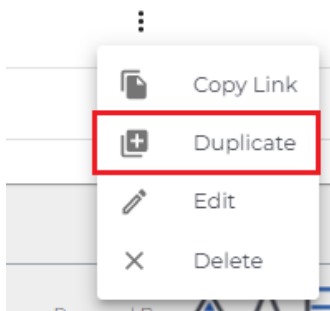
Note on Cash Discount

If Cash Discount is enabled for the merchant, all Hosted Pay Forms will contain the line of text at the bottom of the form, displaying the percentage value defined for the merchant:



Duplicating a Hosted Pay Form

On the Hosted Pay Form Templates list page, select the Select Action button and then the Duplicate option for the template to be duplicated/copied.



The Create A New Hosted Pay Form Template page will display with the existing configurations. The template name will be the same name as the template copied, with “COPY” appended to the name.

Editing a Hosted Pay Form

On the Hosted Pay Form Templates list page, select the Select Action button and then the Edit option for the template to edit. The Edit Hosted Pay Form page will display with the existing configurations.

Refer to the [Hosted Pay Form Configuration Options](#) section for configuration information.

To save, select the Save button.

To cancel, select the Exit button. This will not save any changes and return you to the Hosted Pay Form Templates listing page.

Grabbing the Hosted Pay Form Link

The link for the Hosted Pay Form will allow you to view, make test payments, and use the link for integration with your website. It is required to append the sub_token URL query parameter to the URL, refer to the Sending Sub Token section.

On the Hosted Pay Form Templates page, select the Select Action button and then the Copy Link option for the desired template. This will automatically copy the link for the Hosted Pay Form template, and you can paste the link however you desire. This link will direct anyone to the Hosted Pay Form to begin making payments. By

default, if you do not include any URL query parameters, the Hosted Pay Form will be a donation page allowing the user to pay any amount they desire.

Advanced Options

Sending Sub Token

Sub tokens are used when there is a merchant/sub-merchant relationship. Single, standalone merchants do not make use of sub tokens. If managing a sub-merchant, to ensure that the payments made on the Hosted Pay Form are directed to the correct account on the payment processor, we have a sub token that is assigned to every account.

If a sub-merchant, this sub token(s) is provided to you upon setup.

To send the sub token on the Hosted Pay Form, append the following right after the template name in the URL.

Sub token URL query parameter: `?sub_token=[Sub Token Value]`

Example:

https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?sub_token=838374738373

Sending Amount Owed

Send the Amount Owed on the Hosted Pay Form to allow your customers to see how much they owe. Append the following anywhere in the URL after the sub_token query parameter (if the sub token is in use).

Amount Owed URL query parameter: `&details=[amount owed]`

Examples: <https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?details=50.00>
- if details is the only query string parameter it is preceded by a '?'

https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?sub_token=838374738373&details=50.00

Sending Customer Reference Id

Send the Customer Reference Id on the Hosted Pay Form to allow you to send a reference Id that will be returned to you on the webhook upon a successful transaction. This will allow you to track the transaction along with the provided reference Id. Append the following anywhere in the URL after the sub_token query parameter.

Customer Reference Id URL query parameter: &customerreferenceld=[Customer Reference Id value]

Examples:

<https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?customerreferenceld=838388>

- if customerreferenceld is the only query string parameter it is preceded by a '?'

<https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?details=50.00&customerreferenceld=838388>

https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?sub_token=838374738373&customerreferenceld=838388

https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?sub_token=838374738373&details=50.00&customerreferenceld=838388

https://apex.rev19.net/hpf/TestMerchant/HPFQuarterly?sub_token=838374738373&customerreferenceld=838388&details=50.00

Optional response POST string

The hosted pay form can be configured to do a simple blind POST with the transaction results once the transaction is complete. Your developer can choose to make use of this info. This option can be configured by AFS, and is on the merchant level, not on the form level. The following is returned:

Parameter	Description
-----------	-------------

Amount	Amount of the Transaction
Date	Date of transaction
AccountHoldername	CardHolder Name
CustomerReferenceID	Customer Reference Id passed as query string in HPF to identify customer – not stored as part of transaction, but returned in POST response
CustomField	Value entered by the customer in HPF custom field e.g. Invoice Number, Patient Name, etc.
rspCode	Flag indicating partial payment or not. "01" for partial payment "00" for full payment
TranNr	Transaction Id for successful payments (null if transaction declined)
AvsVerificationCode	Address Verification codes
CvvVerificationCode	CVV Verification codes

An example of a response string for a successful transaction would be:

Amount=10.00&Date=01%2F31%2F2022&AccountHoldername=testFirst
testLast&CustomerReferenceID=&CustomField=1234-
2&rspCode=00&TranNr=14055159&AvsVerificationCode=A&CvvVerificationCode=M

For testing, ngrok or possibly other utilities can be utilized. AFS would have to configure/enable a Test url for the merchant to support this testing effort.

The Production url would also need to be defined by the merchant and provided to AFS so the account can be updated with this value.

CVV Verification Codes:

Code	Response Description
M	CVV2 verification successful
P	CVV2 verification not performed
U	CVV2 verification not available
N	CVV2 verification fail/mismatch
S	CVV2 code not present on card

Address Verification Codes:

Code	Authorization Response Message	Response Definition
0	Approved	Address verification was not requested.
A	Address Match	The street address submitted matches what is on file.

B	Address Match	The street address submitted matches what is on file. The ZIP code does not match what was on file.
C	Service Unavailable	This service is not supported.
D	Exact Match	The street address submitted matches what is on file.
F	Exact Match	The street address and ZIP code submitted match what is on file. This applies to UK transactions.
G	Version Unavailable	The issuer does not participate in this service. This applies to non-US issuers.
I	Version Unavailable	The AVS information was not verified.
M	Exact Match	The street address submitted matches what is on file.
N	No Match	Neither the street address or ZIP code match what is on file.
P	Zip Match	The ZIP code submitted matches what is on file. The street address does not match what is on file.
R	Retry	The issuer system is currently unavailable.
S	Serv Unavailable	This service is not supported.
U	Ver Unavailable	AVS is unavailable.
W	Zip Match	The nine character ZIP code submitted matches what is on file.
X	Exact Match	The nine character ZIP code submitted matches what is on file.
Y	Exact Match	The street address and five character ZIP code submitted matches what is on file.
Z	Zip Match	The nine character ZIP code submitted matches what is on file.

Deleting a Hosted Pay Form

Deleting a Hosted Pay Form will remove the Hosted Pay Form from the Hosted Pay Form Templates listing. If a Hosted Pay Form was accidentally deleted, please contact support to recover the Hosted Pay Form. Otherwise, you can still create a new Hosted Pay Form with the same configurations.

If the link for the Hosted Pay Form has been sent prior to deleting, the user will be directed to a 404 Not Found page.

To delete a Hosted Pay Form, on the Hosted Pay Form Template list page, select the Select Action button and then select the Delete option for the template to be removed. Follow through the delete confirmations to completely delete the Hosted Pay Form.

Testing Info

Card PANs and CVV for success

The following table describes the PANs and CVVs to use for each card brand. Any future expiration date can (and should) be used. Expiration date values prior to today's date do NOT result in declined transactions. Any amount can be used for a successful transaction EXCEPT 6406 and 6405 cents.

Tran Amount	Card Brand	PAN	CVV	Payment Status
<100	Any	Any valid	Any valid	Not Processed
100	American Express	3714 4963 5392 376	9997	Approved
100	Discover	6011 0009 9302 6909	996	Approved
100	Diners Club	3055 1555 1516 0018	996	Approved
100	JCB	3530 1420 1994 5859	996	Approved
100	MasterCard	5146 3126 2000 0045	998	Approved
100	Visa	4012 8818 8881 8888	999	Approved
6405	Visa	4012 8818 8881 8888	999	Error
6406	Visa	4012 8818 8881 8888	999	Declined
>999999999900	Any	Any valid	Any valid	Not Processed

If an error is detected, the form will return this popup. In a test environment, an amount value of \$64.05 will trigger this behavior:

