APEX

APEX Gateway
CHECKOUT
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Checkout List Page

When accessing the Gateway – the Checkout Templates menu item will direct you to the Checkout List Page. Here you can see a list of existing checkout templates – both active and inactive. You can view, edit, copy, and delete existing templates as well as create new templates.

Columns
- Name
- Created Date
- Last Modified Date
- Status – Toggle switch (Active / Inactive)
- Actions

Actions
- Copy Link
- Duplicate
- Edit
- Delete

Create Checkout Template
Text

Template Name
This is how the template is identified on the list page, it does not display to the customer
- Required
  - Min 1 / Max 75
  - Special characters allowed _-

- No duplicates – each template must have a unique name
- By default, the Template Name will be Default

Checkout Details

This section affects the landing page a customer sees when accessing the Checkout form.

- Checkout Title
  - Optional
    - Max 75
    - Special characters allowed !@#$%^&*()_+-={}|[]\:";',./<>?~`
- Description
  - Optional
    - Max 255
    - Special characters allowed !@#$%^&*()_+-={}|[]\:";',./<>?~`
- Upload an Image
  - Optional
    - Max file size: 500 KB
    - Max dimensions: 150px by 500px
- Add Custom Field
  - Optional
  - Can add up to 2 custom fields
  - When a custom field is added, two new fields will display
    - Custom Label
      - Required
        - Min 1 / Max 23
        - Special characters allowed !@#$%^&*()_+-={}|[]\:";',./<>?~`
    - Required checkbox
      - This will determine if the custom field is required by the customer when they access the Checkout form

Pricing Options

This section affects the Amount field on the Checkout form.

- Label for Amount Owed
  - Optional
    - Max 23
    - Special characters allowed !@#$%^&*()_+-={}|[]\:";',./<>?~`
  - If not populated, the default label will be Amount

- Amount
  - Optional
    - Min $1.00 / Max $999,999.00
- Allow Changes to Amount checkbox
  - If selected, customer will be able to make changes to the amount on the Checkout form
  - If not selected, the form will have a fixed value that cannot be changed on the Checkout form
- Minimum Amount
  - Optional
    - Min $1.00 / Max $999,999.00
    - Cannot be greater than the amount and/or the maximum
- Maximum Amount
  - Optional
    - Min $1.00 / Max $999,999.00
    - Cannot be less than the amount and/or the minimum
- Allow URL amount override checkbox
  - If selected, any amount added to the URL parameters will override the amount entered on the Checkout template

** Note: If both **Allow Changes to Amount** and **Allow URL amount override** are unchecked, then **Amount** will be required **

Pricing Scenarios

A checkout template can be created to accommodate multiple pricing needs. Here are some examples of what can be done.

- No set amount
  - Leaving the Amount field blank and checking the Allow Changes to Amount checkbox without a Minimum or Max will create a checkout form that can have any value and will allow a customer to choose what to pay
- Fixed amount
  - Setting the Amount field and leaving the Allow Changes to Amount checkbox unchecked will create a checkout form with a fixed value that the customer cannot change
- Default amount

- Setting the Amount field and checking the Allow Changes to Amount checkbox but not setting a Minimum or Maximum will create a checkout form with a default value but allow the customer to change the value to anything they choose
  - Default amount with a set minimum and maximum value
    - Setting the Amount field and checking the Allow Changes to Amount checkbox and setting a Minimum and Maximum value will create a checkout form with a default value but allow the customer to change the value to something within the amount range set
  - Set amount in URL parameters
    - By checking the Allow URL amount override checkbox, you can pass through the amount for the checkout form in the URL details parameter

Billing and Shipping

This section affects the Billing and Shipping page on Checkout

- Collect Shipping Information
  - If selected, fields to collect shipping information will display and be required for the customer on the checkout form

Review and Pay Options

This section affects the Review page on Checkout

- Call to Action button
  - This will determine what the button to submit a transaction says in the checkout form
  - Options:
    - Pay (default)
    - Book
    - Donate
- Redirect URL
  - Optional
    - Max 250
  - After a customer completes a transaction, the Exit button on the final confirmation page will redirect to the URL entered here. If no URL is entered here, no Exit button will display and the user will need to close the tab to exit the checkout form
- Email Merchant Receipt checkbox

- o If checked, a copy of the transaction receipt will be sent to the email address on the merchant record every time a transaction is completed using the template
- Email Customer Receipt checkbox
  - o If checked, the Email field under Billing and Shipping on the checkout form will be required for the customer and a receipt will be sent to the email address provided once the transaction is complete

Additional Options
- Logo
  - o The logo will display on the checkout form and the emailed checkout receipts
  - o By default, the logo on the merchant record will display here – if the merchant record does not have a logo, then the merchant name will be used on the checkout form unless a logo is added here
  - o Optional
    - Max file size: 500 KB
    - Max dimensions: 150px by 500px
- Header
  - o Optional
    - Max 255
    - Special characters allowed !@#$%^&*()_+-={}|[]\:";',./<>?~`

- Footer
  - o Optional
    - Max 255
    - Special characters allowed !@#$%^&*()_+-={}|[]\:";',./<>?~`

Getting Link to Checkout

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

URL Override

Subtoken

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 Checkout 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 Checkout Form, append the following right after the template name in the URL.

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

CustomerReferenceID

Customer Reference ID URL query parameter: &customerreferenceId=[Customer Reference Id value]
- if customerreferenceId is the only query string parameter it is preceded by a '?'

Amount Owed

When utilizing the **Allow URL amount override** setting, send the Amount Owed on the Checkout 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]
- if details is the only query string parameter it is preceded by a '?'

Accessing Checkout

Landing Page

The following information from the Checkout Template will display on the Landing page when a customer accesses the checkout form
- Checkout Title
- Description

- Image
- Amount
- Custom Fields
    - If these are marked as required on the Checkout Template, the user must populate this fields before moving forward with the checkout

If the Checkout Template is set up with a fixed amount, the amount field will not be an editable field
For the desktop view, the landing page will always be visible on the left-hand side of the screen as the user moves through the checkout form

For the mobile view, the landing page will be the first page of the checkout form

Payment Method Page
If the merchant has Apple Pay enabled and the checkout form is accessed on a supported device, the customer will have the option to pay using Apple Pay. This will open the Apple Pay view and the customer will complete their transaction there.

If the merchant has ACH enabled, the option to pay with eCheck will display

If the merchant has Dual Pricing, text showing how much will be saved by paying with eCheck will display. When CC is selected as the payment method, text saying "Save X by paying with eCheck" will display. When eCheck is selected as the payment method, text saying "Saving X by paying with eCheck" will display.

The option to pay with Credit Card will always be available

- Credit Card
    - First Name
    - Last Name
    - Card Number
    - MMYY
    - CVV
- eCheck - If enabled for merchant
    - First Name

- o Last Name
- o Routing Number
- o Checking / Savings radio button
  - ▪ Checking selected by default
- o Account Number
- o Confirm Account Number
  - ▪ Must match Account Number

Billing and Shipping Page

Billing fields will always display, shipping fields will only display if **Collect Shipping Information** is selected on the Checkout Template

- Billing
  - o Email
    - ▪ Required if Email Customer Receipt checkbox is selected on Checkout Template
  - o Phone Number
    - ▪ Optional
  - o Country dropdown
    - ▪ Only displays for Credit Card
    - ▪ Default to United States of America
  - o Address 1
  - o Address 2
  - o City
  - o State dropdown
  - o Postal Code
- Shipping
  - o Same as Billing checkbox
    - ▪ If selected, Shipping address will be set to same as billing, shipping fields will not display
  - o First Name
  - o Last Name
  - o Email
    - ▪ Optional
  - o Phone Number
    - ▪ Optional

- o Country dropdown
  - ▪ Only displays for Credit Card
  - ▪ Default to United States of America
- o Address 1
- o Address 2
- o City
- o State dropdown
- o Postal Code

Review and Pay Page

This page will give the user an opportunity to review the information entered before submitting the transaction. If the **Call to Action** button is set as Pay, this will be the Review and Pay page. If it is set to Book, this will be the Review and Book page. If it is set to Donate, this will be the Review and Donate page.

- Summary
  - o Total (Same as Amount from Landing Page)
  - o Discount
    - ▪ Only displays for Dual Pricing eCheck transactions
  - o Taxes
  - o Paying
    - ▪ Final total (Amount – Discount + Taxes)
- Details (Only displays if Custom Fields have been added to Checkout Template)
  - o Edit icon
    - ▪ Only displays in mobile view
    - ▪ Directs user back to Landing page
  - o Custom field 1
  - o Custom field 2
- Payment
  - o Edit icon
    - ▪ Directs user back to Payment Method page
  - o For CC
    - ▪ Last 4 of CC number
    - ▪ Name
    - ▪ Expiration date
  - o For eCheck
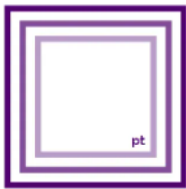
- - - Acct Number
      - Account Type
      - Name
  - Billing
    - Edit icon
      - Directs user back to Billing and Shipping page
    - Name
    - Address
    - Email
    - Phone Number
  - Shipping (Only displays if Collect Shipping Information is checked on Checkout Template)
    - Edit icon
      - Directs user back to Billing and Shipping page
    - Name
    - Address
    - Email
    - Phone Number
  - Pay / Book / Donate button
    - The text for this button is determined by the **Call to Action** setting on the Checkout Template
    - This will submit the transaction

Confirmation Page

Once the payment has been submitted and the transaction successfully processed, the user will see the Payment Accepted screen

- Payment Details
  - Total
  - Discount (only displays for eCheck transactions for Dual Pricing merchants)
  - Taxes
  - Paid
    - Final total (Amount – Discount + Taxes)
- Merchant Name
- Transaction Date / Time
- Transaction ID
- For CC

- o Card Number
- o Card Type
- o Name
- For eCheck
  - o Account Number
  - o Account Type
  - o Name

Payment Accepted
Thank you for your payment!

Payment Details

Total:	$100.00
Taxes:	$0.00
Paid:	**$100.00**

Merchant Name: PT Solutions
Transaction Date: 01/30/2024 10:23 AM (CST)
Transaction ID: 41882007

Card Number: x2376
Card Type: American Express
Name: Aaron Brand

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Failed Transaction

If there is an issue processing the transaction, the user will receive a popup informing them that the transaction has failed. They will be sent back to the Payment Method page to make changes and try again. The user will have 3 attempts before the transaction is considered failed and the entire form will need to be restarted.

Gather Wallet Information

Once a customer has been created, you can send them a link to add payment methods to their wallet

Go to the Customers menu item and select the **Gather Wallet Information** button. This will open a popup where you can select the customer and generate a link. This link will be specific to the customer selected and can be used to add a payment method to their wallet.