APEX Gateway

CUSTOMERS

Date: 02.21.2024

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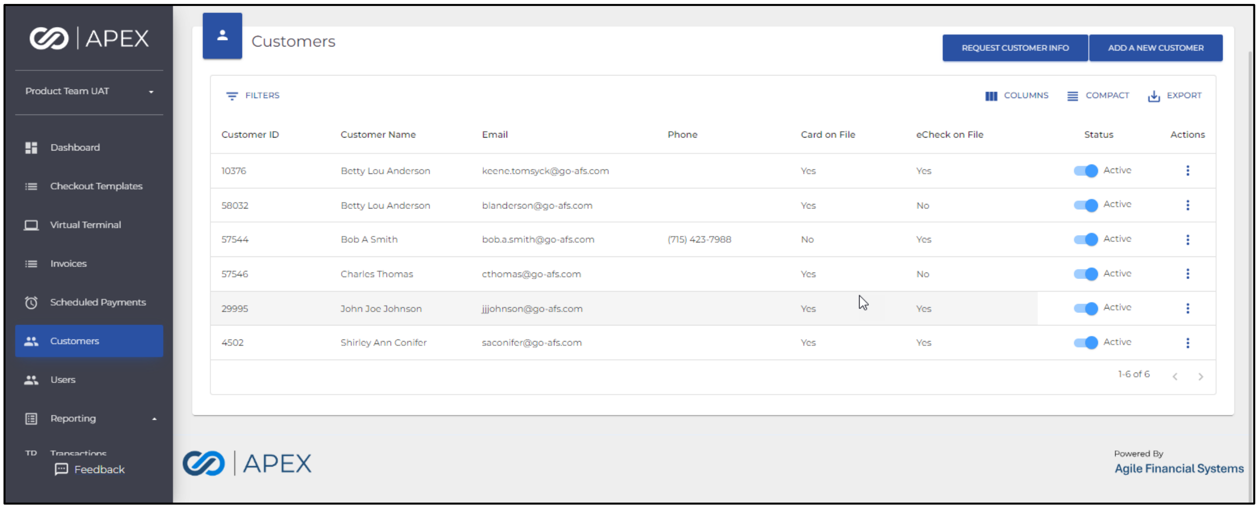
Customers

- 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.



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
- eCheck on File
  - Displays Yes/No depending on if the customer has a bank account 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
- Email
- Phone Number

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

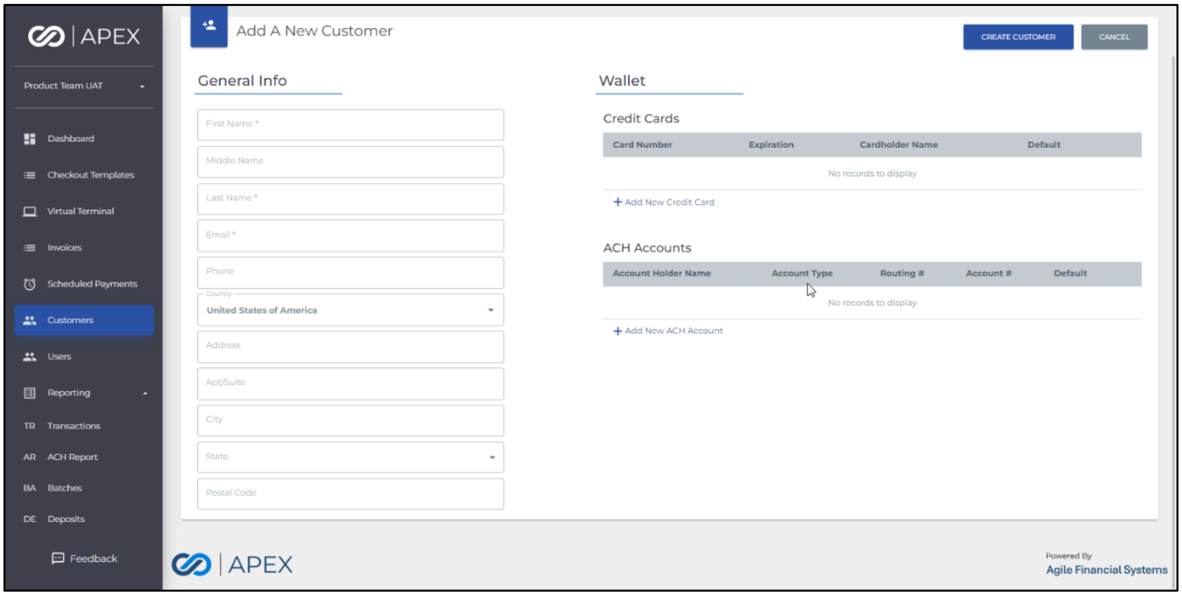
- By selecting Compact, the row height will minimize to display more rows.

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.



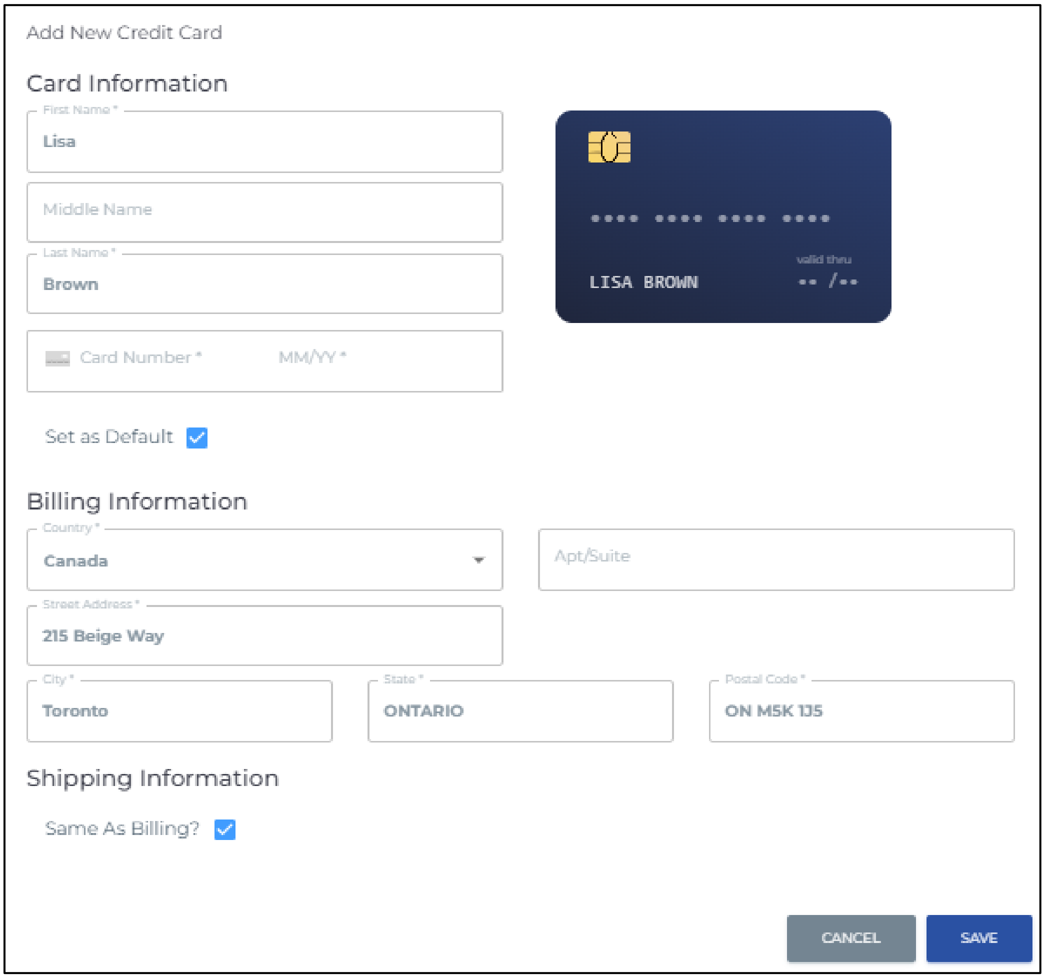
General Info

- Each Customer profile contains the following information:
- Customer First Name – Required
- Customer Middle Name – This field is optional
- Customer Last Name – Required
- Email - Required
- Phone – This field is optional
- Country – Required
- Address - Required
- Apt/Suite – This field is optional
- City - Required
- State - Required
- Postal 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 Billing Information will be pre-populated with the customer's address.
- You will need to enter:
  - Credit Card Number
  - Expiration Date

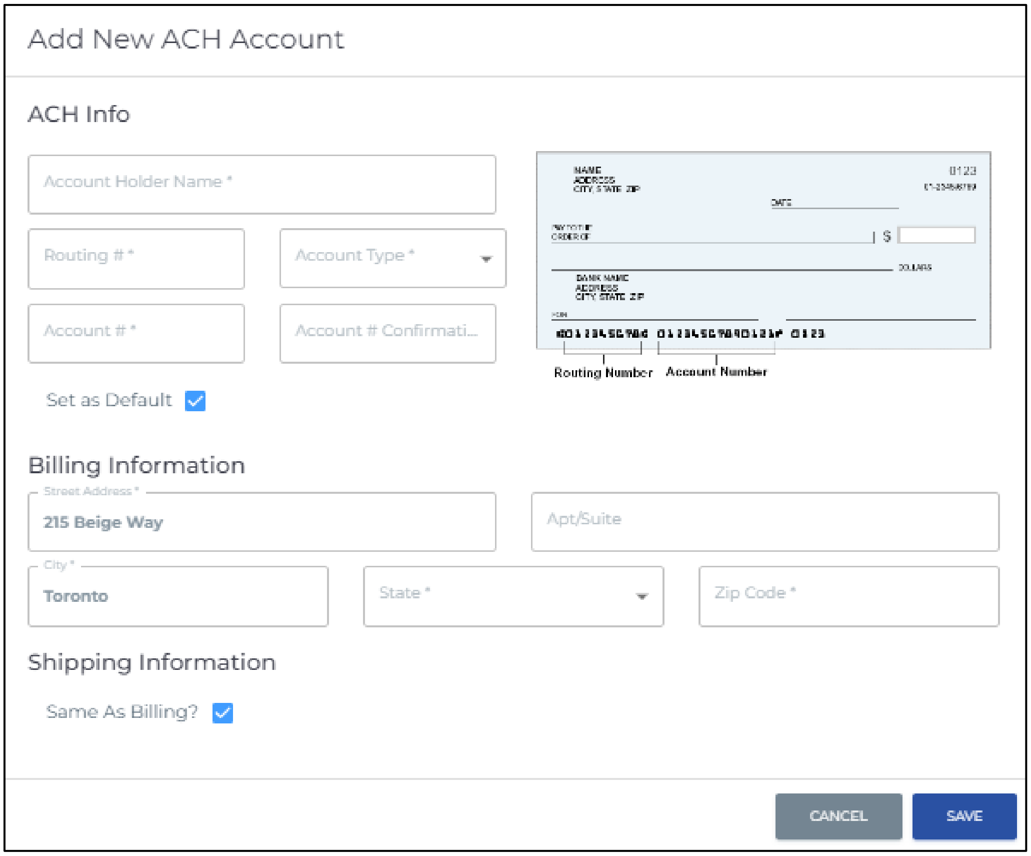
- The **Set as Default** checkbox will set the credit card as the default payment option for the customer.



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 Billing Information will be pre-populated with the customer's address
- You will need to enter:
  - Account Holder Name
  - 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.



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

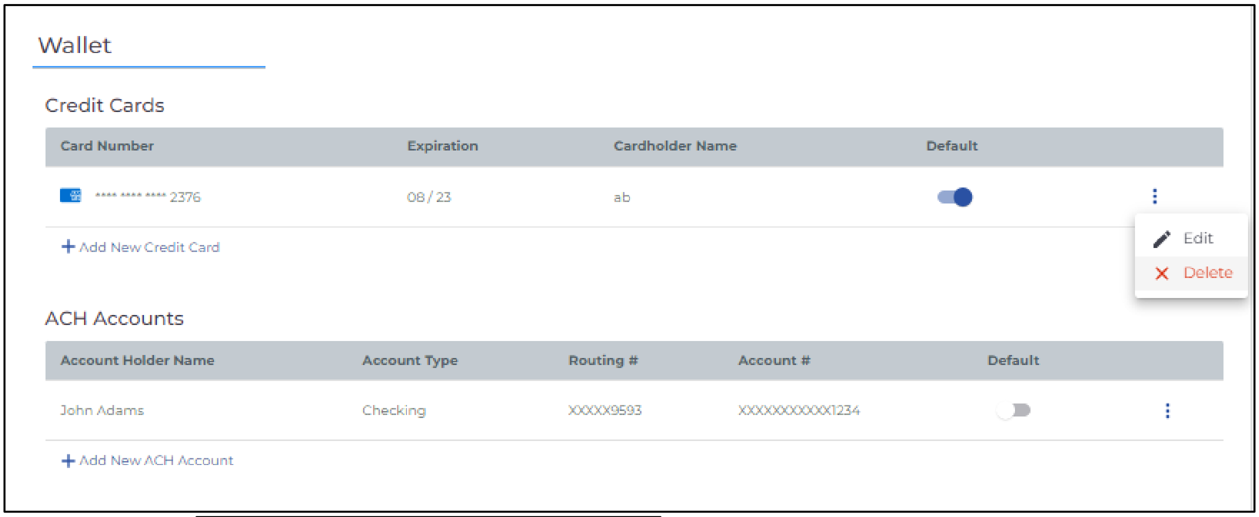
Update ACH Account

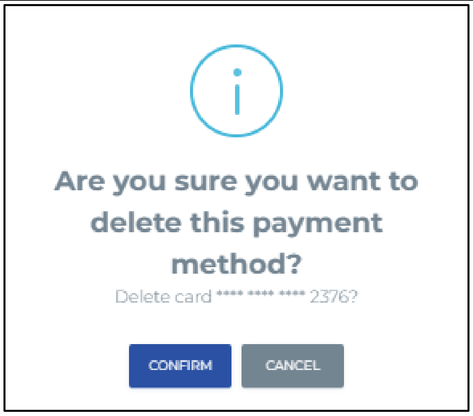
When editing an existing customer, you have the ability to update the following fields on existing ACH accounts:

- Billing Information
- Shipping Information

Delete Payment Type

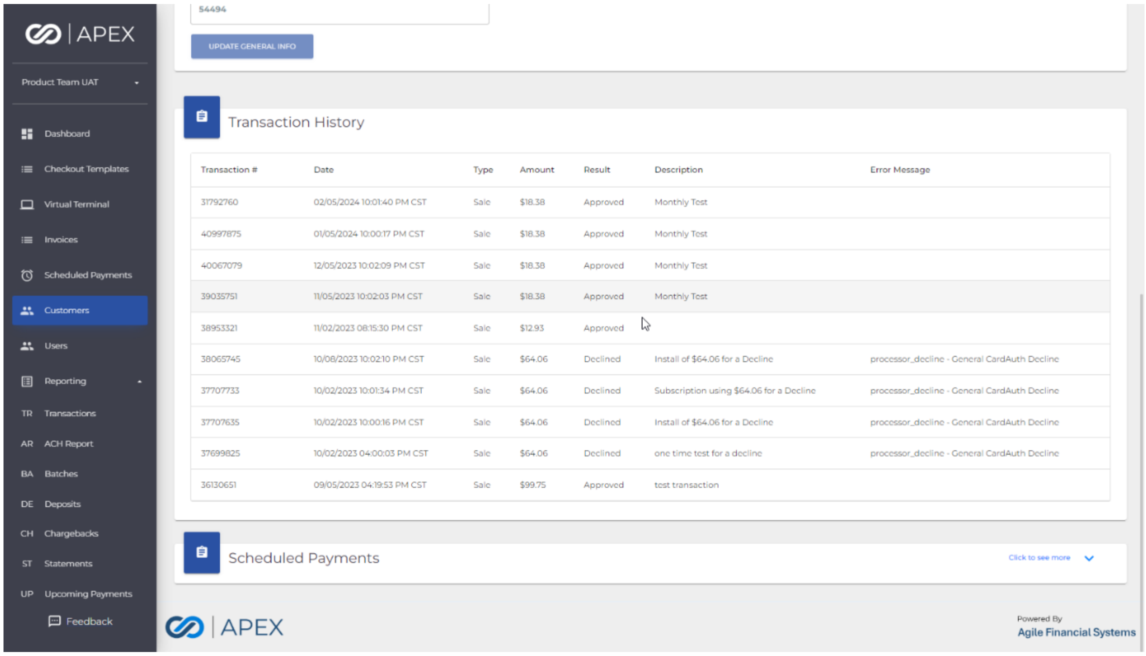
- You have the ability to delete a payment method by selecting the action button (vertical ellipsis) for the row containing the payment method you wish to delete and choose the Delete option.





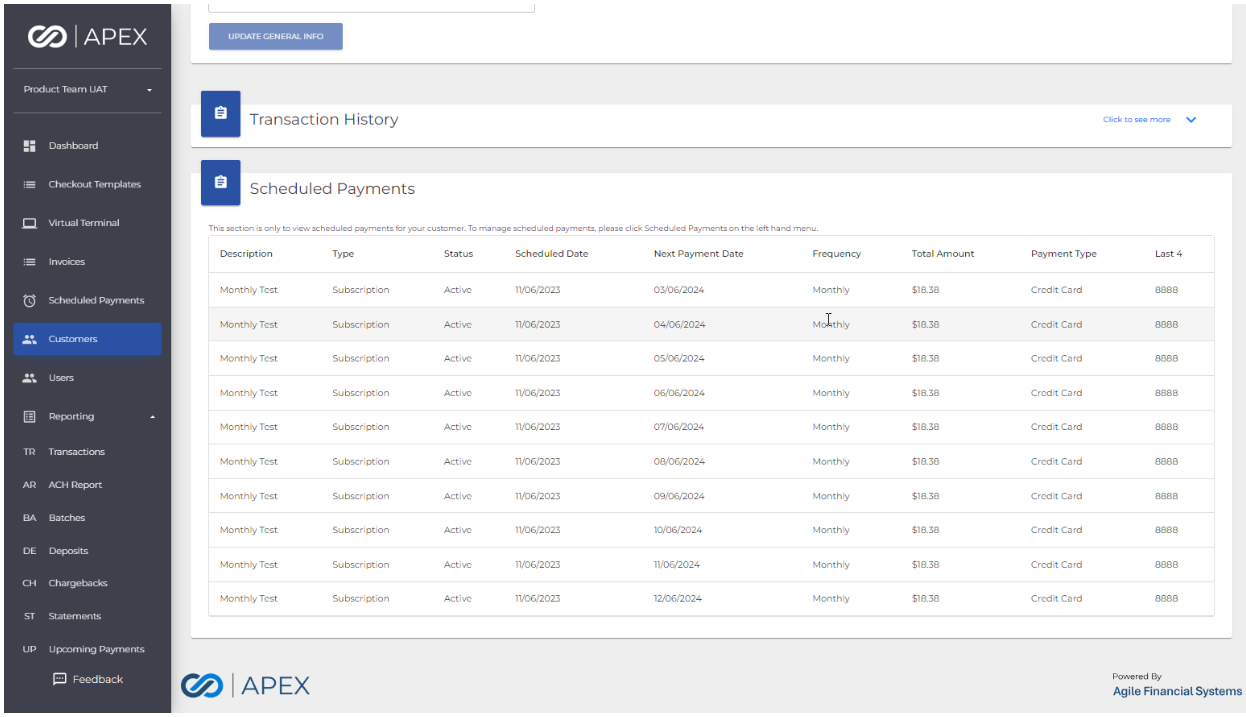
Transaction History

- View details on previous transactions that have been run for the selected customer.
- Transaction #
- Date
- Type
- Amount
- Result
- Description
- Error – populates with the error message received if the transaction failed



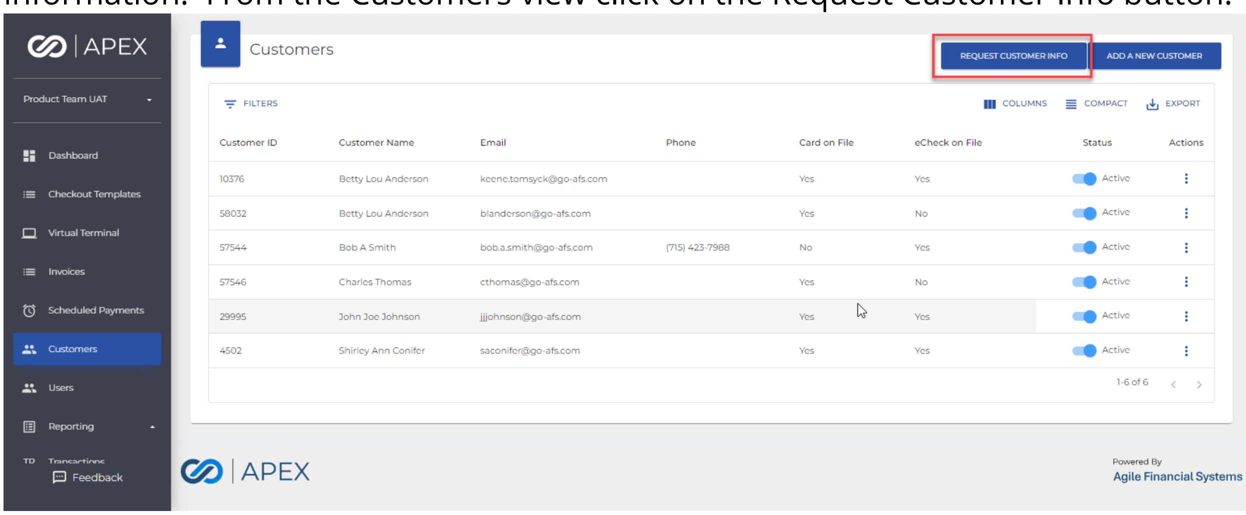
Scheduled Payments

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

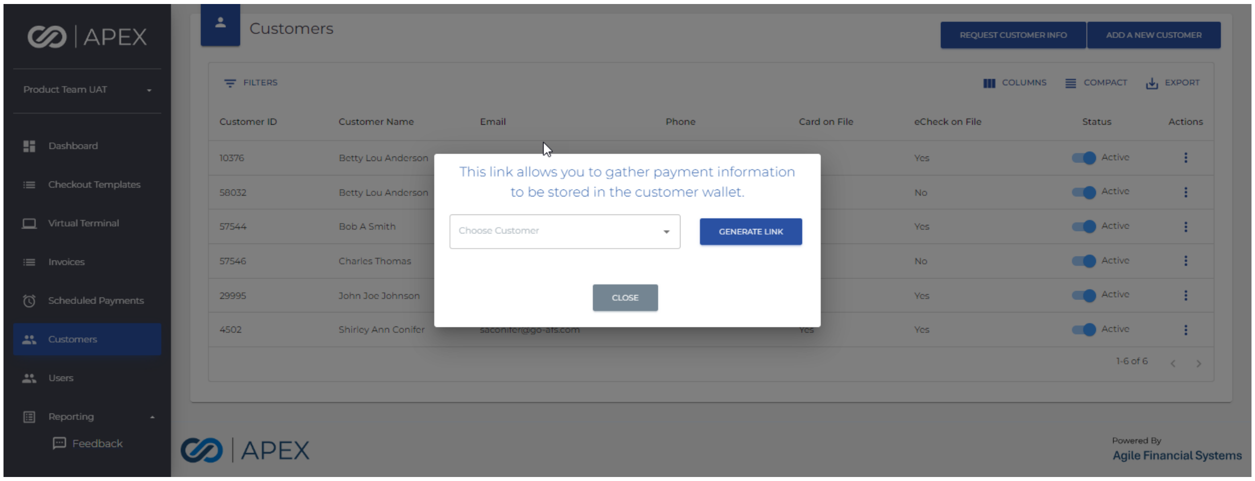


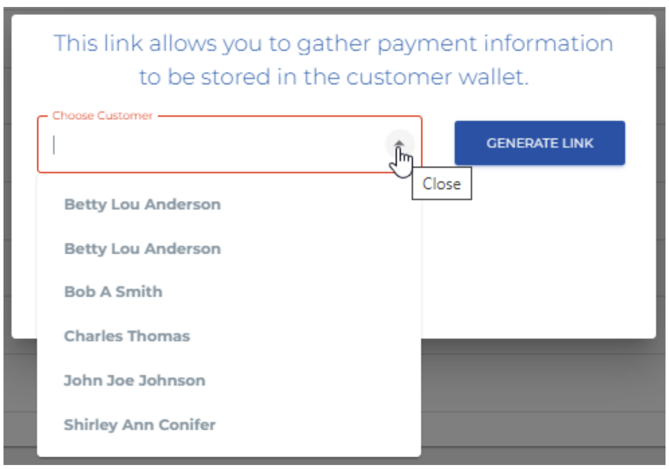
Checkout Request Customer Information

Merchants can create a customer-specific form that will gather customer information. From the Customers view click on the Request Customer Info button.

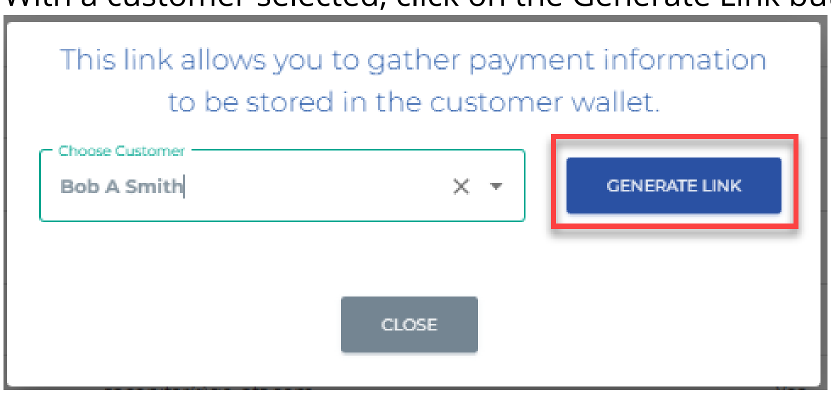


A dropdown list of existing customers will be displayed to allow you to select a customer. Note: The customer must already exist, but all that is required for a customer is first and last name and email address.



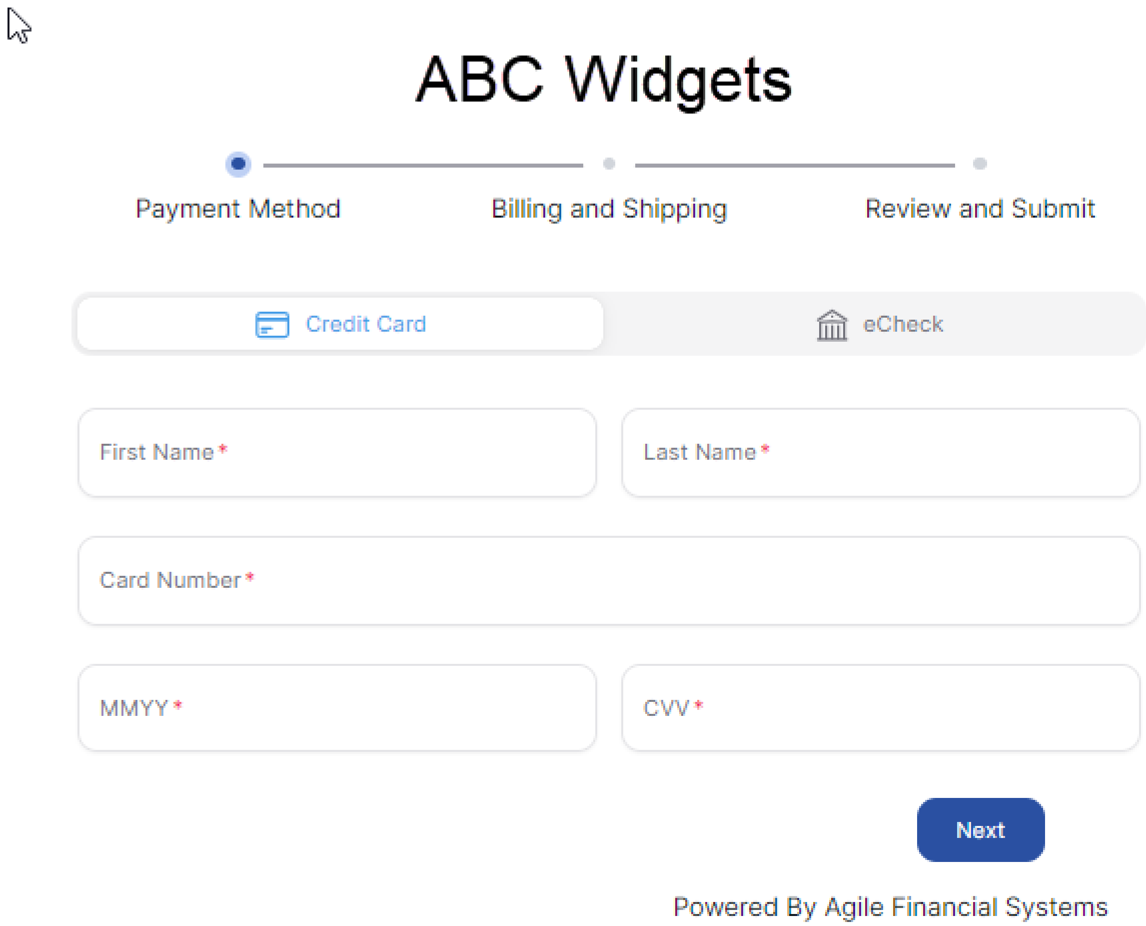


With a customer selected, click on the Generate Link button:



A unique link will be created and displayed. Note the icon to the right of the link. Click on the icon to copy the link.

You can now paste the unique link into the body of an email. Your customer can then access the page (hosted by AFS) to allow them to provide you, the merchant, additional customer information. Both wallet and billing and shipping info. Below is an example of what the customer would see. Your merchant name would appear at the top:



If you have a logo defined for the account, your merchant logo will appear at the top instead of the merchant name.

After the customer completes the form, the customer profile will be updated with the provided information.
Additionally, the customer will receive an email similarto the example below:

Hi *Customer* ,

The following payment method has been saved to your wallet: Card 8888

Thank you,

Powered By

Agile Financial Systems

Note: Please DO NOT reply. This email is coming from an unmonitored email account.