



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.

Customer ID	Customer Name	Email	Phone	Card on File	eCheck on File	Status	Actions
10376	Betty Lou Anderson	keene.tomsyck@go-afs.com		Yes	Yes	Active	
58032	Betty Lou Anderson	blanderson@go-afs.com		Yes	No	Active	
57544	Bob A Smith	bob.a.smith@go-afs.com	(715) 423-7988	No	Yes	Active	
57546	Charles Thomas	cthomas@go-afs.com		Yes	No	Active	
29995	John Joe Johnson	jjjohnson@go-afs.com		Yes	Yes	Active	
4502	Shirley Ann Conifer	saconifer@go-afs.com		Yes	Yes	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
- 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 New Credit Card

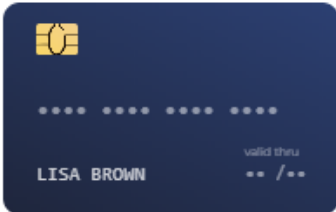
Card Information

First Name *

Middle Name

Last Name *

Set as Default



Billing Information

Country * Apt/Suite

Street Address *

City * State * Postal Code *

Shipping Information

Same As Billing?

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.

Add New ACH Account

ACH Info

NAME	0123
ADDRESS	
CITY STATE ZIP	0123456789
SWIFT	
NEW YORK	
ORDER OF	\$
BANK NAME	DOLLARS
ADDRESS	
CITY STATE ZIP	
IBAN	
001104567890 012345678901234 0123	
Routing Number	Account Number

Billing Information

Shipping Information

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.

The screenshot shows the 'Wallet' section of a user interface. It is divided into two main areas: 'Credit Cards' and 'ACH Accounts'.
Under 'Credit Cards', there is a table with columns: Card Number, Expiration, Cardholder Name, and Default. A single card is listed with a masked number ending in 2376, an expiration of 08/23, and the name 'ab'. A toggle switch is turned on, and a vertical ellipsis menu is visible. A tooltip menu is open over this menu, showing 'Edit' and 'Delete' options.
Under 'ACH Accounts', there is a table with columns: Account Holder Name, Account Type, Routing #, Account #, and Default. One account is listed for 'John Adams' with a 'Checking' account type, routing number 'XXXXX9593', and account number 'XXXXXXXXXXXX1234'. A toggle switch is turned off, and a vertical ellipsis menu is visible.
Below each table is a '+ Add New' button.

A confirmation dialog box is displayed. It features a large blue information icon at the top. The text reads: 'Are you sure you want to delete this payment method?' followed by 'Delete card **** * 2376?'. At the bottom, there are two buttons: 'CONFIRM' (in blue) and 'CANCEL' (in grey).

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

The screenshot displays the APEX system interface. On the left is a navigation sidebar with options like Dashboard, Invoices, Customers, and Reporting. The main content area shows a search bar with '54494' and an 'UPDATE GENERAL INFO' button. Below this is the 'Transaction History' section, which contains a table with the following data:

Transaction #	Date	Type	Amount	Result	Description	Error Message
37792760	02/05/2024 10:01:40 PM CST	Sale	\$18.38	Approved	Monthly Test	
40997875	01/05/2024 10:00:17 PM CST	Sale	\$18.38	Approved	Monthly Test	
40067079	12/05/2023 10:02:09 PM CST	Sale	\$18.38	Approved	Monthly Test	
39035751	11/05/2023 10:02:03 PM CST	Sale	\$18.38	Approved	Monthly Test	
38953321	11/02/2023 08:15:30 PM CST	Sale	\$12.93	Approved		
38065745	10/08/2023 10:02:10 PM CST	Sale	\$64.06	Declined	Install of \$64.06 for a Decline	processor_decline - General CardAuth Decline
37707733	10/02/2023 10:01:34 PM CST	Sale	\$64.06	Declined	Subscription using \$64.06 for a Decline	processor_decline - General CardAuth Decline
37707635	10/02/2023 10:00:16 PM CST	Sale	\$64.06	Declined	Install of \$64.06 for a Decline	processor_decline - General CardAuth Decline
37699825	10/02/2023 04:00:03 PM CST	Sale	\$64.06	Declined	one time test for a decline	processor_decline - General CardAuth Decline
36130651	09/05/2023 04:19:53 PM CST	Sale	\$99.75	Approved	test transaction	

Below the table is a 'Scheduled Payments' section with a 'Click to see more' link. The footer of the interface includes the APEX logo and the text 'Powered by Agile Financial Systems'.

Scheduled Payments

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

UPDATE GENERAL INFO

Transaction History [Click to see more](#)

Scheduled Payments

This section is only to view scheduled payments for your customer. To manage scheduled payments, please click Scheduled Payments on the left hand menu.

Description	Type	Status	Scheduled Date	Next Payment Date	Frequency	Total Amount	Payment Type	Last 4
Monthly Test	Subscription	Active	11/06/2023	03/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	04/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	05/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	06/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	07/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	08/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	09/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	10/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	11/06/2024	Monthly	\$18.38	Credit Card	8888
Monthly Test	Subscription	Active	11/06/2023	12/06/2024	Monthly	\$18.38	Credit Card	8888

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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.

Customers

REQUEST CUSTOMER INFO ADD A NEW CUSTOMER

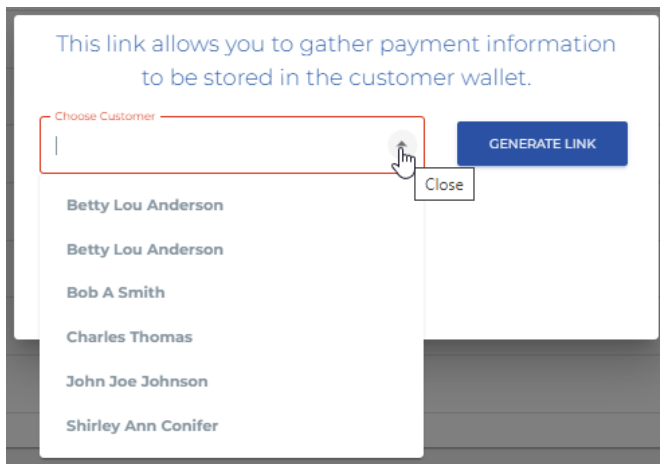
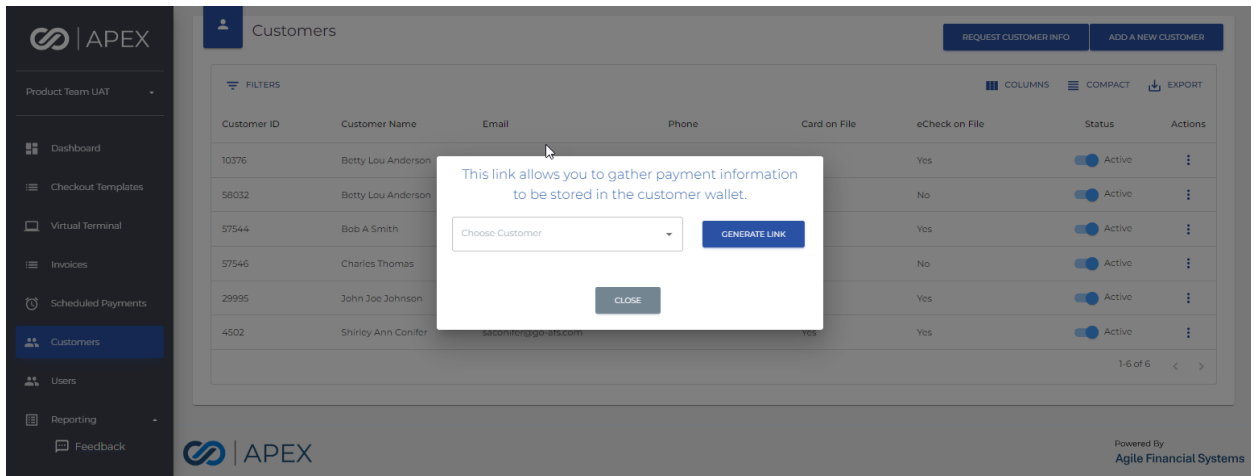
FILTERS COLUMNS COMPACT EXPORT

Customer ID	Customer Name	Email	Phone	Card on File	eCheck on File	Status	Actions
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57544	Bob A Smith	bob.a.smith@go-afs.com	(715) 423-7988	No	Yes	Active	
57546	Charles Thomas	cthomas@go-afs.com		Yes	No	Active	
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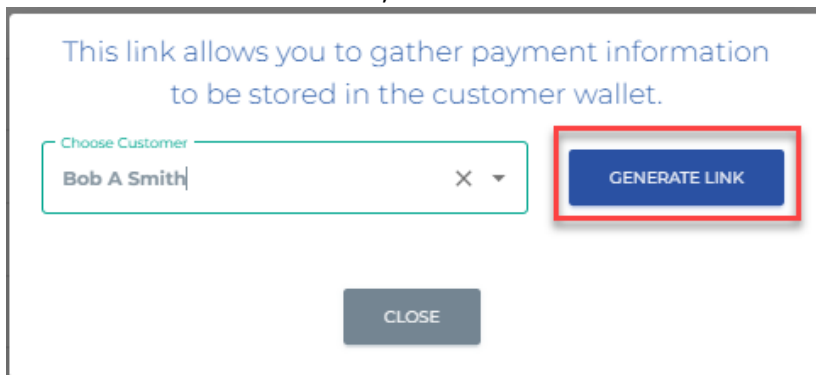
1-6 of 6 < >

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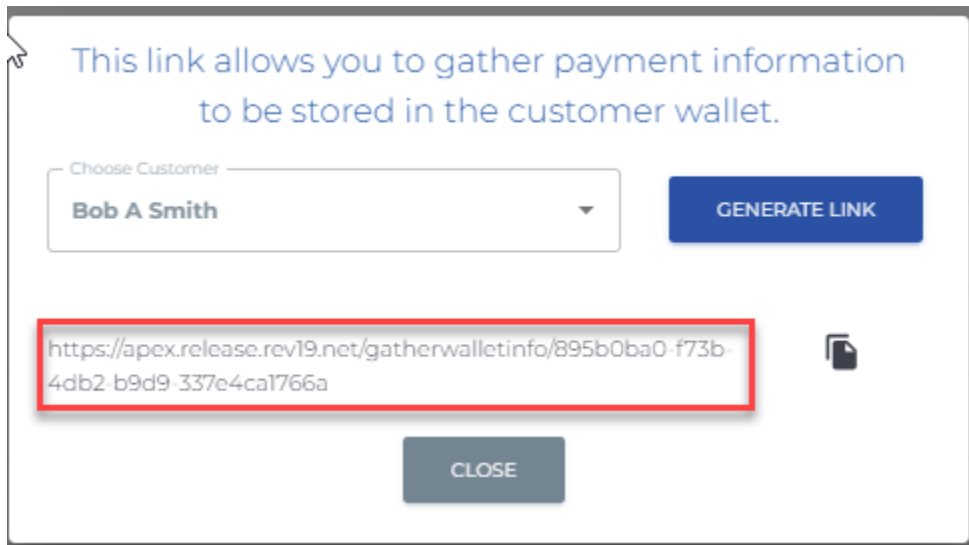
A dropdown list of existing customers will be displayed to allow you to select a customer. Note: The customer must already exist, but all that is required for a customer is first and last name and email address.



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:



ABC Widgets

Progress indicator: Payment Method (selected), Billing and Shipping, Review and Submit

Payment Method: Credit Card eCheck

First Name* Last Name*

Card Number*

MMYY* CVV*

[Next](#)

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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 similar to 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.