



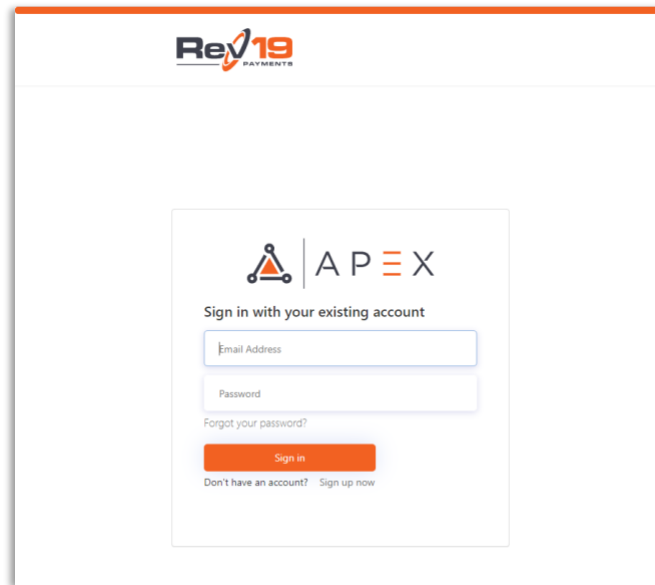
Managing Hosted Pay Forms

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Logging into the Apex Portal

1. Go to the Apex Portal site, using the url provided to you upon setup.

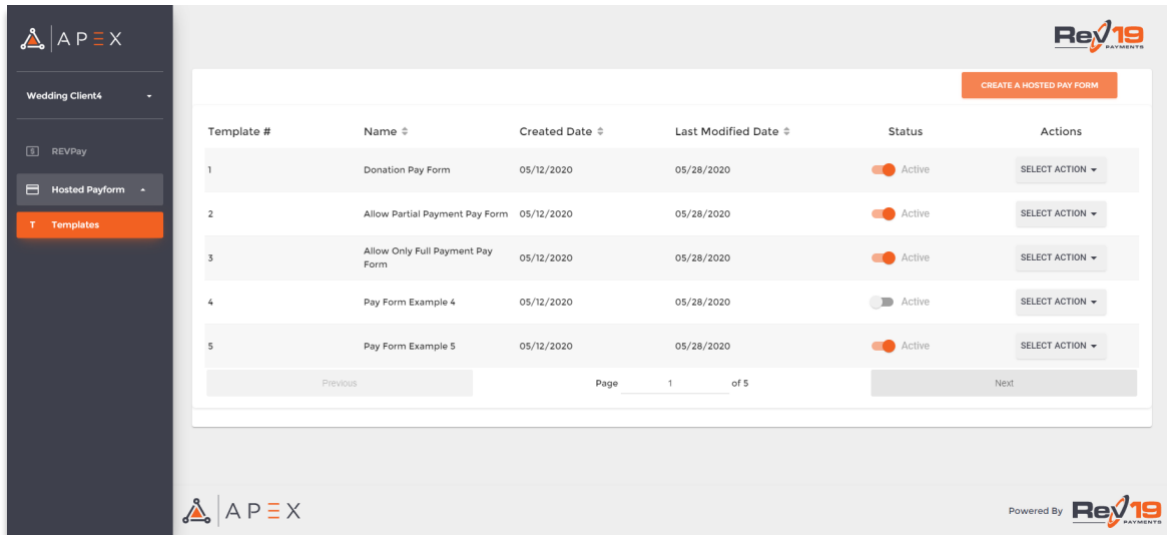


2. Enter in the credentials that were provided to you upon setup and click **Sign in**.
 - a. If the password needs to be reset, select the **Forgot your password?** link below the **Password** field. Follow the steps to reset your password. You will need to know and have access to the email address associated to your Apex Portal account.
3. Once logged in, refer to the follow sections to manage your Hosted Pay Forms.

Viewing Your Hosted Pay Forms in the Apex Portal

1. To view a list of all your hosted pay forms, select the **Hosted Pay Forms** menu option and select the **Templates** sub-menu.
2. 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 Portal to manage your Hosted Pay Forms, you may not have any Pay Forms created on your account at this time. If yes, 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	Donation Pay Form	05/12/2020	05/28/2020	<input checked="" type="checkbox"/> Active	SELECT ACTION
2	Allow Partial Payment Pay Form	05/12/2020	05/28/2020	<input checked="" type="checkbox"/> Active	SELECT ACTION
3	Allow Only Full Payment Pay Form	05/12/2020	05/28/2020	<input checked="" type="checkbox"/> Active	SELECT ACTION
4	Pay Form Example 4	05/12/2020	05/28/2020	<input type="checkbox"/> Active	SELECT ACTION
5	Pay Form Example 5	05/12/2020	05/28/2020	<input checked="" type="checkbox"/> Active	SELECT ACTION

3. From the list you can easily view the status of the Hosted Pay Form, Created Date, Modified Date, and Hosted Pay Form Template Name. By default, the templates are sorted by Created Date most recent first.
4. The sorting can be changed by selecting the sorting icon on the column name for the Name, Created Date, and Modified Date columns.
5. To manage your Hosted pay forms, refer to the following sections:
 - a. Creating a Hosted Pay Form
 - b. Editing a Hosted Pay Form
 - c. Grabbing the Hosted Pay Form Link
 - d. Deleting a Hosted Pay Form

Activating and Inactivating Hosted Pay Forms

1. To activate or inactivate a Hosted Pay Form, select the status toggle.
 - a. Orange colored toggle is active
 - b. Grey colored toggle is inactive
2. 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.
3. 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.

Creating a Hosted Pay Form

1. On the Hosted Pay Form Templates list page, select the **Create a Hosted Pay Form** button.
2. 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.

Hosted Pay Form Configuration

Template Name
<default>

Upload a Logo

Redirect URL Cancel URL

Header

Footer

Payment Information

Label for Amount Owed
Total Amount

Allow Partial Pay

Add Custom Field

Billing Information

Shipping Information

Card Information

3. Refer to the [Hosted Pay Form Configuration Options](#) section to configure the Hosted Pay Form as desired.
4. To save, select the **Save** button.
5. 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 Rev19 logo, to change the logo upload a logo that falls within the following guidelines.

- Image Dimensions: Height 95 pixels by Width 400 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, then the **Finish** button will not display. The customer must exit the page by closing their browser or browser tab.

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, the **Cancel** link will not be available for the customer. The customer must exit the page by closing their browser or browser tab.

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.”.

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.

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’.

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

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.

1. To enable Partial Payments, expand the Payment Information section if it is not already expanded.
2. Select the **Allow Partial Payments** checkbox.
 - a. If the checkbox is marked, it is enabled,
 - b. 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.

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.

1. To enable a Custom Field on the Hosted Pay Form, expand the Payment Information section if it is not already expanded.
2. Select the **Add Custom Field** checkbox to enable it.
 - a. If the checkbox is marked, it is enabled,
 - b. If the checkbox is unmarked, it is disabled.
3. Once enabled, there will be two configurations that will display.
 - a. **Custom Label** field: this allows you to configure the label for the custom field.
 - b. **Required** checkbox: this allows you to configure the custom field as required or optional. To make the custom field required, enable the **Required** option.

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.

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

Editing a Hosted Pay Form

1. On the Hosted Pay Form Templates list page, select the **Select Action** button and then the **Edit** option for the template to edit.
2. The Edit Hosted Pay Form page will display with the existing configurations.
3. Refer to the Hosted Pay Form Configuration Options section for configuration information.
4. To save, select the **Save** button.
5. 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.

1. On the Hosted Pay Form Templates page, select the **Select Action** button and then the **Copy Link** option for the desired template.
2. 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.

Sending Sub Token

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.

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: www.hostedpayformurl.com?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.

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

Example:

www.hostedpayformurl.com?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: *&customerreferenceid=[Customer Reference Id value]*

Examples:

www.hostedpayformurl.com?sub_token=838374738373&customerreferenceid=838388

www.hostedpayformurl.com?sub_token=838374738373&details=50.00&customerreferenceid=838388

www.hostedpayformurl.com?sub_token=838374738373&customerreferenceid=838388&details=50.00

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.

1. 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.
2. Follow through the delete confirmations to completely delete the Hosted Pay Form.

For questions or concerns, please contact Rev19 Support:

Email: support@rev19.net

Phone: 888-708-8019