# Customer Statements Getting Started Guide Rev 1.5

# Glossary

## CX-API-Key

The value we use to authenticate your requests. A CX-API-Key is linked to a Service Location.

## Service Location

A Service Location contains data that describes the business entity.

## Customer

This is the person or entity that you'll create, and subsequently, initiate Statement balance updates.

## Statement

A Statement lets the Customer know how much they owe, and gives them an opportunity to easily pay that balance.

## Payment

A Credit Card charge performed against the outstanding balance of a Statement.

## primaryPhone

This primary phone number for a customer should be a number capable of receiving SMS Text messages (mobile or cell phone number)..

## Autocomplete

Allows a web browser or service to automatically populate credit card fields with card info (card number, expiry date, etc…).

# Customer Statements Getting Started Guide

Link to postman: https://documenter.getpostman.com/view/10238133/SzmY7gGr

## How to Create a Statement for a Customer to Make Payments

## Step 1: Create / Update a Service Location

Once you have your credentials, you'll need to create a Service Location.

To create a Service Location, send a POST request to the setServiceLocation endpoint. If everything is good, we'll return a successful response with the info for your Service Location. Otherwise, we'll return an error letting you know what went wrong.

You can use the Postman example below to test this out.

| |
|---|
| Postman Example:<br>https://documenter.getpostman.com/view/10238133/SzmY7gGr?version=latest#e2434238-2eda-4701-aaad-c9ed56234fb5 |

## Step 2: Create / Update a Customer

Now it's time to add a Customer to your Service Location.

To create a Customer, send a POST request to the setCustomer endpoint. If all is well, you'll receive a response that includes an ID for the Customer you just created.

To update an existing Customer, include the Customer ID in your request payload.

**Important Note:** If no ID is passed in the request, we create a new Customer record.

Keep in mind, we use the 'primaryPhone' and 'primaryEmail' attributes to determine where to send Statement Notifications (Phone is preferred, but we'll use email if no Phone is provided).

Use the Postman request below to try it out

| |
|---|
| Postman Example:<br>https://documenter.getpostman.com/view/10238133/SzmY7gGr?version=latest#6cb04920-2c41-4247-9f77-62ca1a4aa6a |

# Step 3. Create / Update a Statement

Now that you have a Customer, it's time to create a Statement for them.

To create a Statement, send a POST request to the setStatement endpoint. If successful, you'll receive a response that includes an ID for that particular statement. We'll automatically notify your Customer that they have a statement available.

Every Customer can have only 1 statement at a time, so their statement link will always show the newest info.

An attachment can be added to the statement in PDF format as a raw Base64 encoded string (See the Postman example showing 'Statement with Attachment')

**Tip:** If you'd like to have the same link the Customer gets, include the 'Location-As-Navigable-Url: true' header in your Statement request. We'll return the statement link as part of the response header, which includes a normal link and a tinylink.

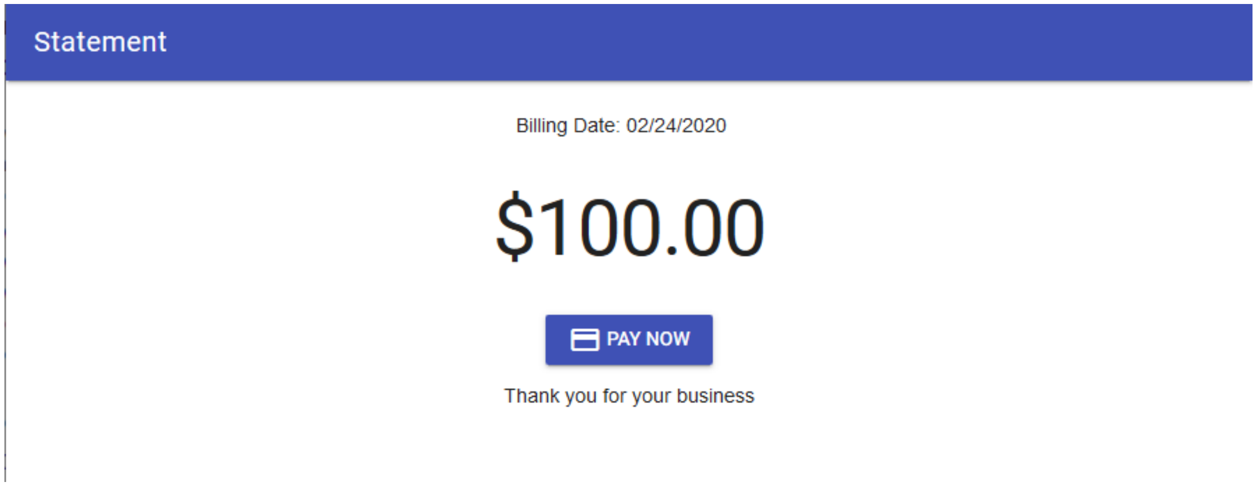
**Important Note:** The statement link is only for the Customer. A merchant user should never use that link! Autocomplete is enabled, and a merchant user's browser may autofill incorrect card details.

Use the Postman request below to simulate creating a statement.

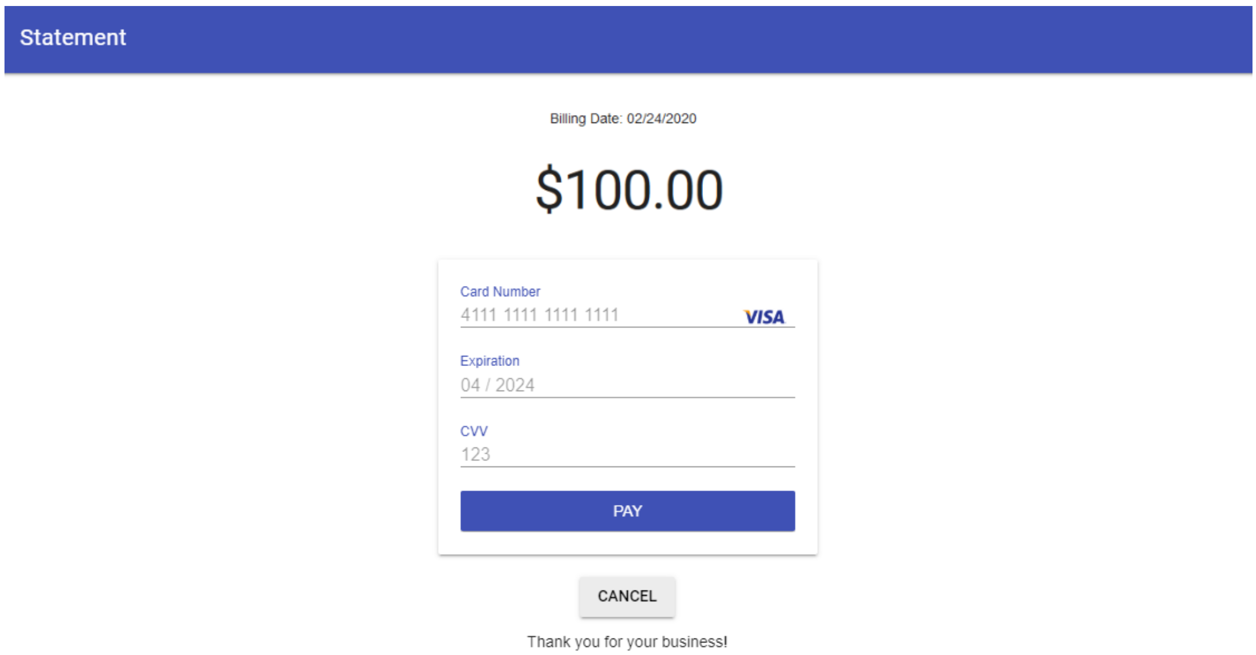
| |
|---|
| Postman Example:<br>https://documenter.getpostman.com/view/10238133/SzmY7gGr?version=latest#3dbc5db5-f8d2-4dfe-ab6f-5a32ef5233c |

# Step 4: Make a Payment Toward a Statement

You can view the statement using the link in your Customer's notification, or the link we return in the Statement request (see Step 3 for 'Location-As-Navigable-Url')




Click the ‘Pay Now’ button to make a Credit Card payment for that statement.




Fill out the Credit Card fields and click ‘Send’ to apply the payment.

# Step 5: Receive a Completed Payment

You can easily find out when a Payment is posted using the PUSH option below.

1. **PUSH**
   a. Setup a Webhook that can receive PUSH notifications
   b. Send the URL to your Integration Specialist, and we'll configure our system to PUSH to that Webhook
   c. When a payment is completed, we will PUSH a notification to your webhook. That notification has all the info you need to update your records.
   d. You'll send a Statement request with the updated Balance Due.

**Example:**

1. Customer John pays his entire statement balance ( $49.95 )
2. We PUSH that notification to your management system
3. You update your records (John's now owes $0.00)
4. You send a Statement request with that updated Balance. (John's new statement balance is $0.00)

**Important Notes:**

- You should send an updated Statement request whenever the Balance Due changes. This ensures your Customer's Statement is always up to date.

See the Postman request below for an example of the Payment webhook the Management System would implement.

| |
|---|
| Postman Example:<br>https://documenter.getpostman.com/view/10238133/SzmY7gGr?version=latest#9beb2711-062d-4c4d-ba9f-adafa47688a9 |