paymentshub

Your guide to your business command center.

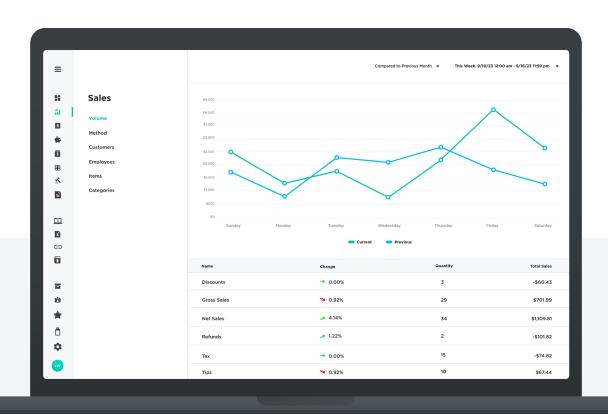
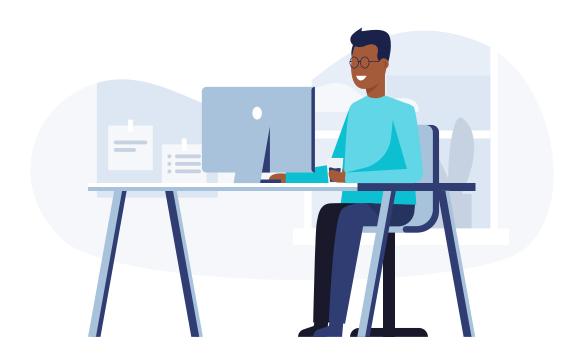


Table of contents

About Payments Hub	3
What is it?	4
Plans & pricing	5
Getting started	
Menu	6
Historic hardware mode	7
Basic page structure	8
User Settings	9
Activity	
Dashboard	10
Sales	11
Transactions	12
Deposits	13
Batches	14
Reports	15
Disputes	16
Statements	17
Payments	
Virtual Terminal	18
Invoices	19
Payment Links	20
Customers	21
Customers - Loyalty Program	22

Business Management	
Inventory	23
Employees	24
Employees Roles	25
Reputation	26
Hardware & Supplies	27
Business Settings	28
Using Payments Hub	29
Log in	
Logging in	30
Adding MIDs to an account	31
Viewing processing activity	
Transactions	32
Deposits	33
Batches	34
Payments Hub app	35
Accepting a payment	
Virtual Terminal	36
Invoices	37
Updating information	
Updating user settings	38
Updating business settings	39
Help	40

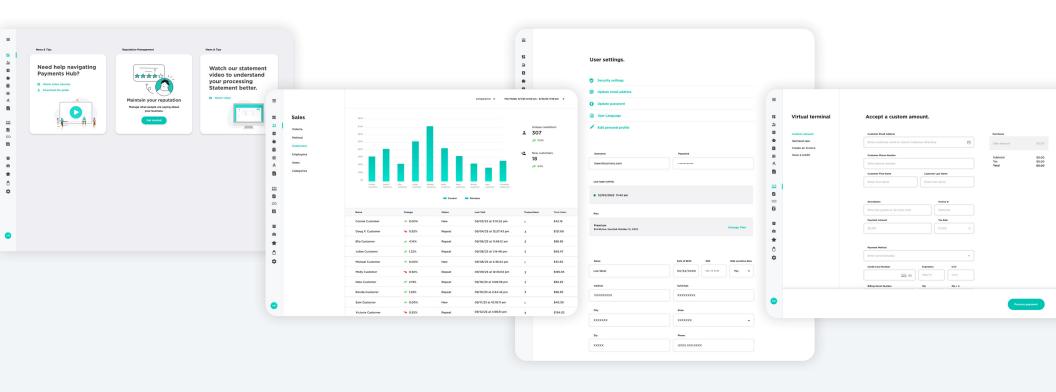
About Payments Hub.



What is it?

Payments Hub is the command center for your business needs. Accept online payments, pull reporting and statements, edit your account information, and more.

Depending on your account type and Payments Hub plan, some features and functionality displayed in this guide may not be applicable to you.



Plans & Pricing.

Payments Hub offers Free, Premium, and Premium Plus plans.

 Premium Plus with Loyalty is only available to merchants with Payanywhere equipment processing on EPX.

New merchants are automatically enrolled in a 60-day free trial of the Premium Plus plan. After the trial, you will be charged \$29.95/mo, unless you choose to downgrade to the Premium or Free plan.

You can view and manage your plan under User Settings.

Some features are only available to merchants with certain equipment and processors. Contact your sales rep or call **877.464.4218** to see which features you are eligible for or to update your account/equipment.

	Free \$0.00/mo	Premium \$14.95/mo	Premium Plus \$29.95/mo	Premium Plus with Payanywhere Loyalty \$29.95 + \$15.00/mo
Dashboard	•	•	•	•
Sales	•	•	•	•
Transactions	•	•	•	•
Deposits	•	•	•	•
Batches	•	•	•	•
Reports	•	•	•	•
Disputes	•	•	•	•
Statements	•	•	•	•
Virtual Terminal	•	•	•	•
Invoices (includes card on file and recurring payments)			•	•
Payment Links (Payanywhere only)			•	•
Customers (Payanywhere only)	•	Ø	•	Ø
Loyalty (Payanywhere only)				Ø
Inventory (Payanywhere only)	•	•	•	•
Employees	•	Ø	•	Ø
Reputation Management		Ø	•	Ø
Hardware & Supplies	•	Ø	Ø	•
Free Paper		Ø	•	Ø
Free Shipping		Ø	•	•
Terminal Warranty		•	•	•
Business Settings	•	•	•	•
Factor4 Gift Cards		•	•	•

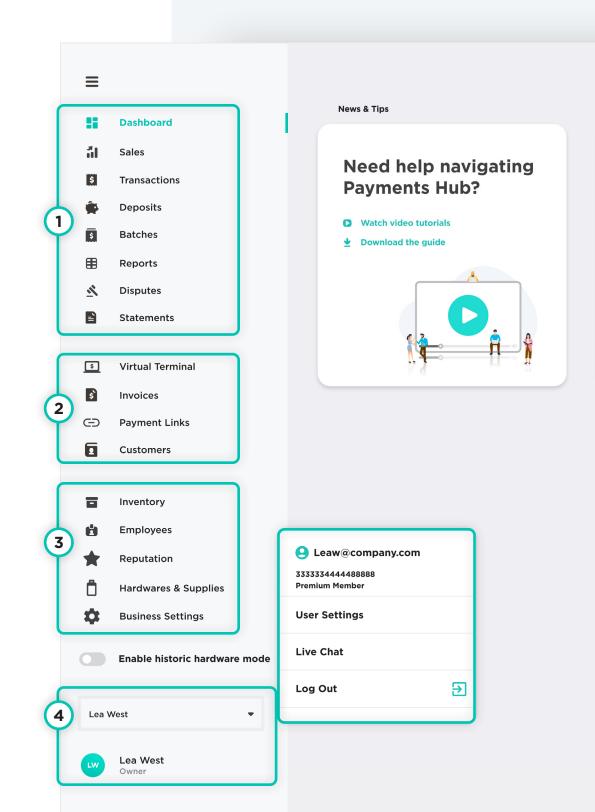
Duamairum Dire

Menu.

The navigation menu contains icons that link you to each individual page within Payments Hub. These icons are split into four main sections:

- 1 Activity Dashboard, Sales, Transactions, Deposits, Batches, Reports, Disputes, and Statements.
- 2 Payments Virtual Terminal, Invoices, Payment Links, and Customers.
- 3 Business Management Inventory, Employees, Reputation, Hardware & Supplies, and Business Settings.
- 4 User Settings Located at the bottom of the menu. This includes your username, MID, User Settings (Personal Info), Switch Accounts, Related MIDs, and Log Out.

You can hover over an icon to see its name, or click the menu icon (≡) at the top for an expanded menu with the icon names.



Statem

Augu

EPX

July 2

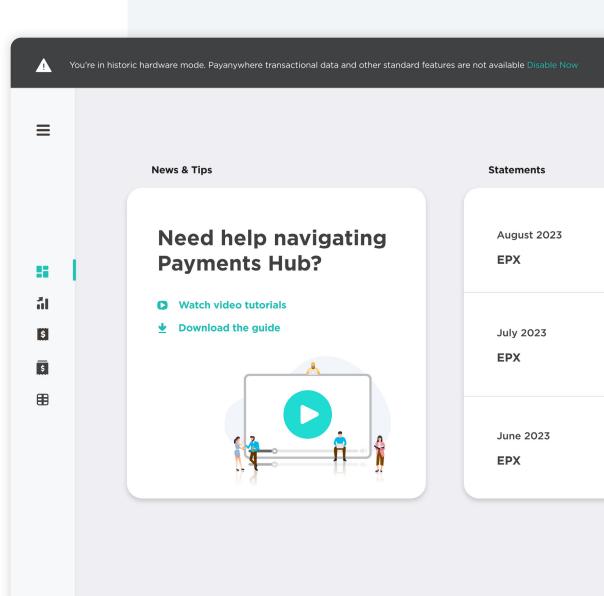
EPX

EPX

Historic hardware mode.

This setting is only visible for merchants who use both Payanywhere equipment and traditional terminal equipment. (Ex. Payanywhere Smart Terminal and Ingenico iCT 220.)

- By default, you will see your Payanywhere data when you log in to Payments Hub.
- To view the data for your traditional terminal(s), enable historic hardware mode.
- When historic hardware mode is enabled, you will only see Sales, Transactions, Batches, and Reports as available features.

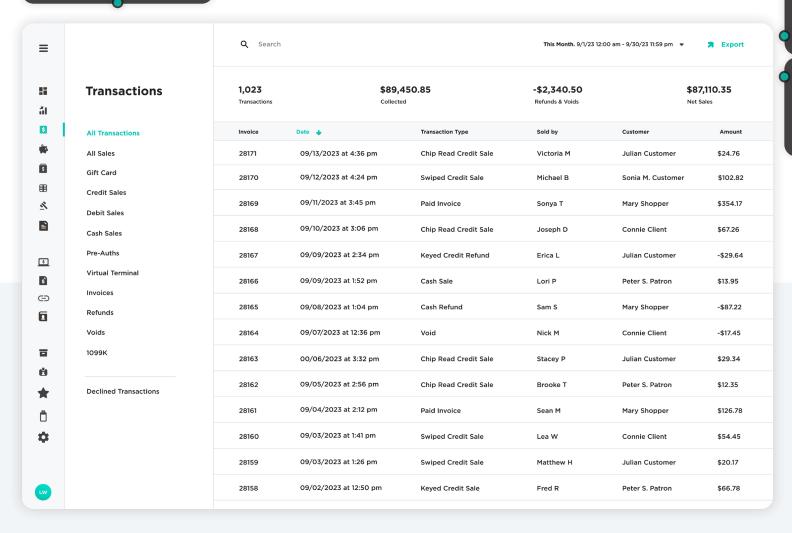


historic hardware mode

Basic page structure.

Each page shares a visual hierarchy that puts the focus on your data.

Left panel - Use the panel to quickly filter data.



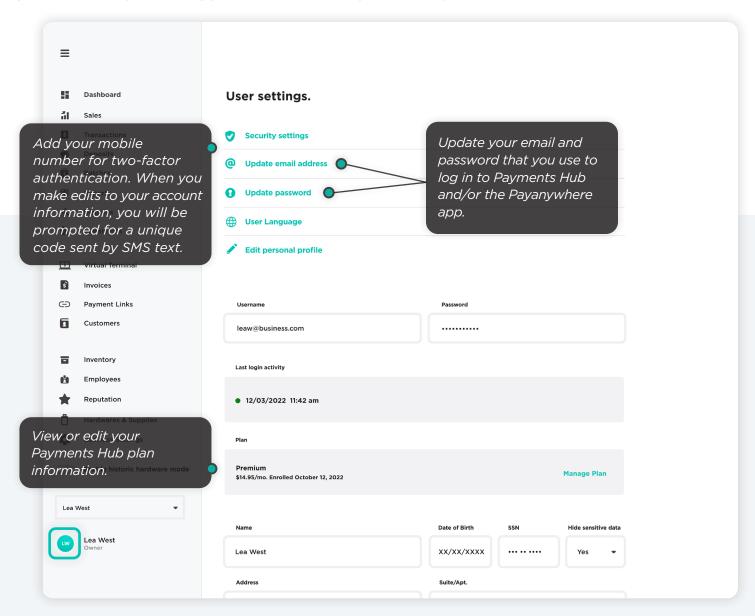
Toolbar - Search and filter your data.

Use the date dropdown to select from preset date and time ranges, or create a custom range.

Available actions will be on the far right of the toolbar.

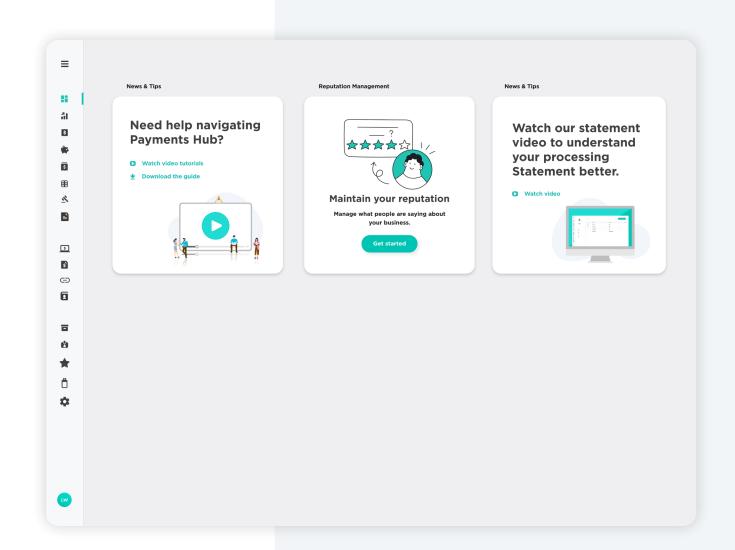
Sorting bar - Tap a column header to sort data in ascending or descending order.

View and edit your User Settings, including your username and Payments Hub plan.



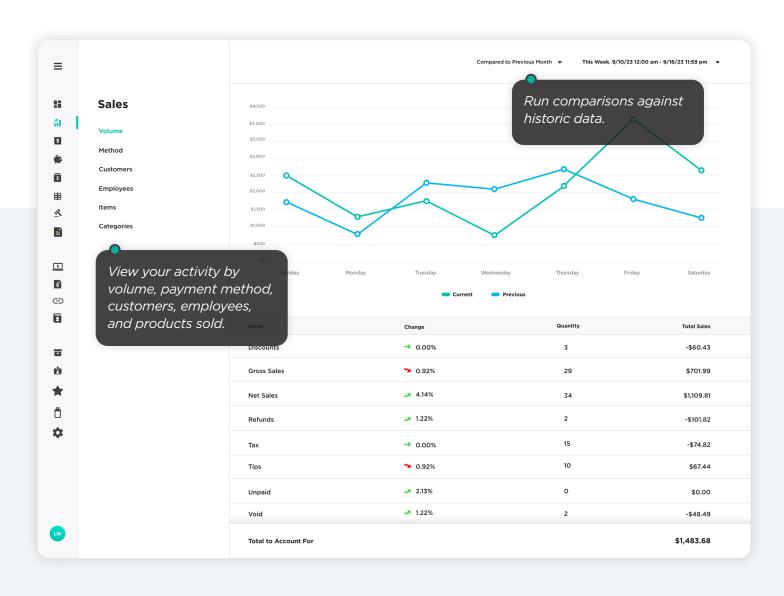
Dashboard.

This is the default home screen when you log in. Here you'll see shortcut widgets to your statements and other helpful information.



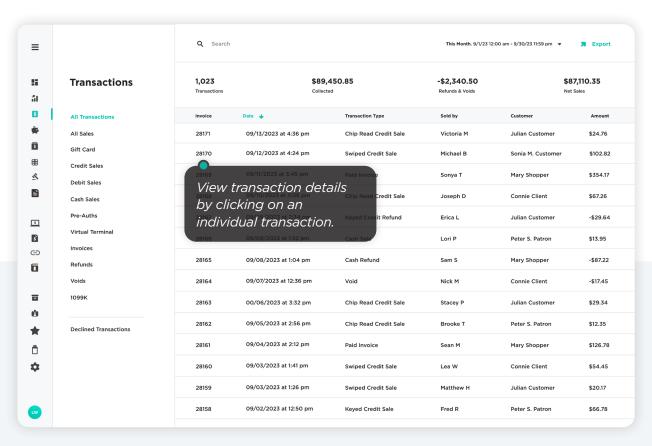
Sales. il

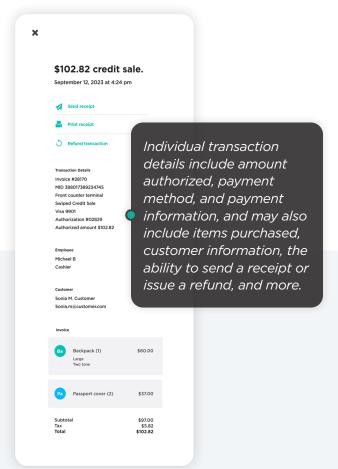
See a breakdown of your sales activity with the help of charts and graphs.



Transactions. §

The Transactions page shows a collection of all your sales, refunds, voids, invoice payments, and more.





Where are today's transactions? Transactions will display after you have batched.

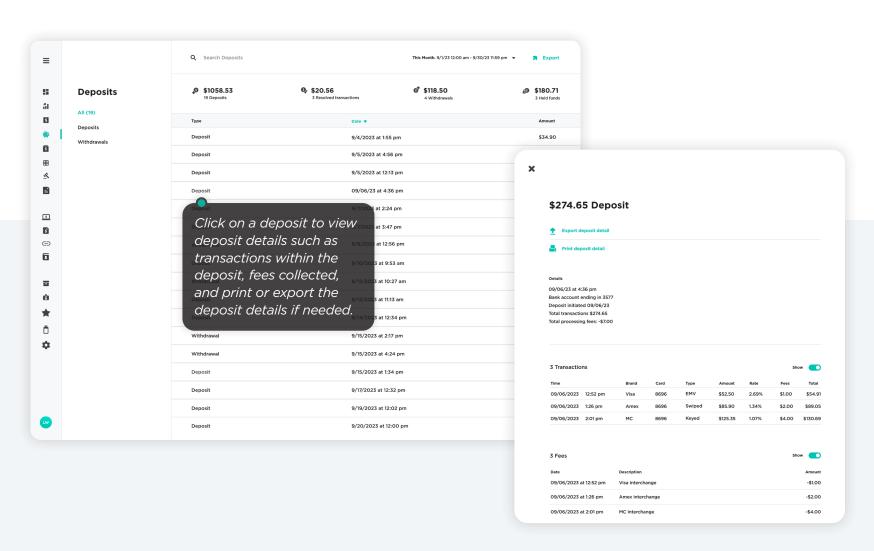
Open Batch is a list of live credit card authorizations that have not yet settled and does not include refunds, cash, and Virtual Terminal transactions.

Open Transactions — Payanywhere only: Manual Close merchants can view and close their open transactions. If applicable, merchants using tip adjust may also add and save tips to their open transactions.

Depending on your account type and pricing, you may see different levels of detail in your transactions.

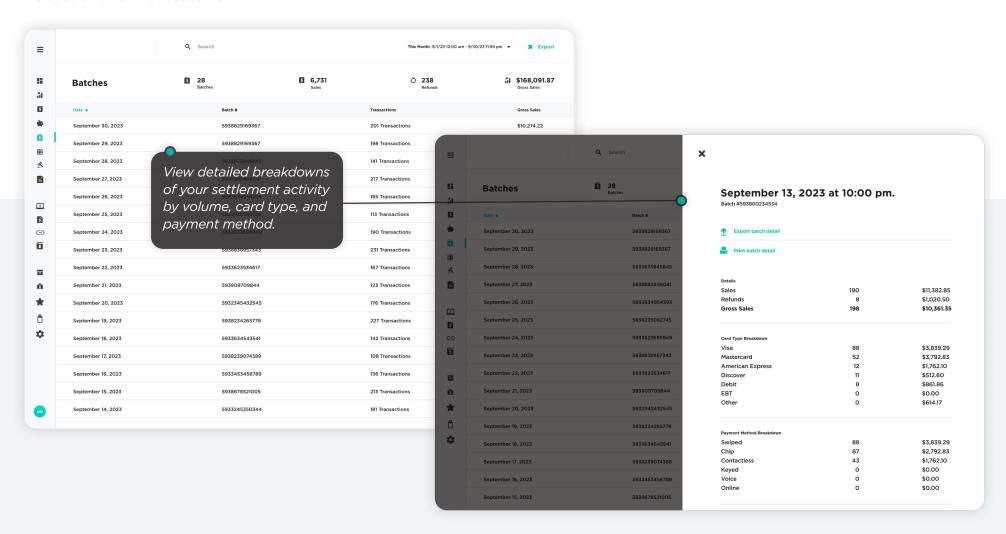
Deposits.

View a list of incoming and outgoing activity from your bank account based on transactions and settlements.



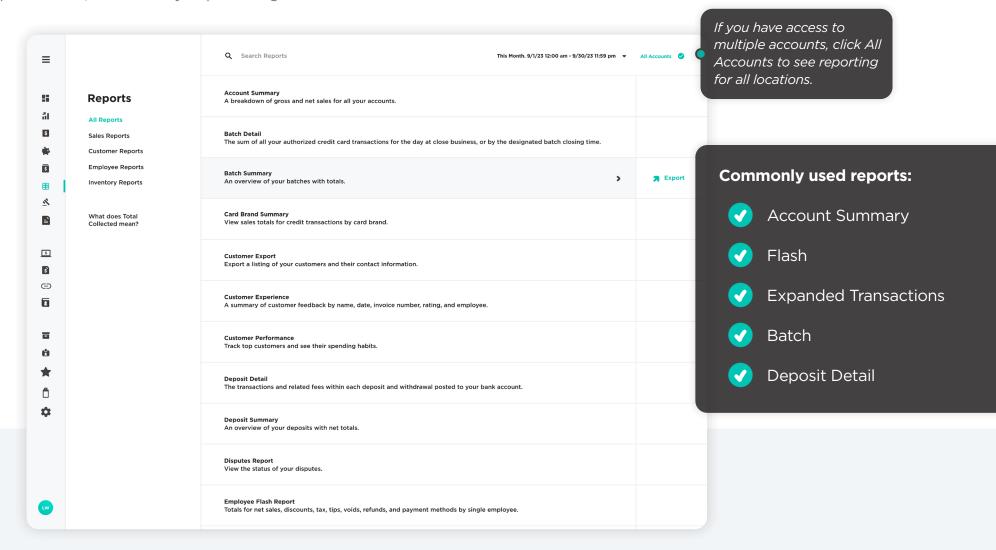
Batches. 5

Batches are a record of the transactions you've closed and sent for settlement.



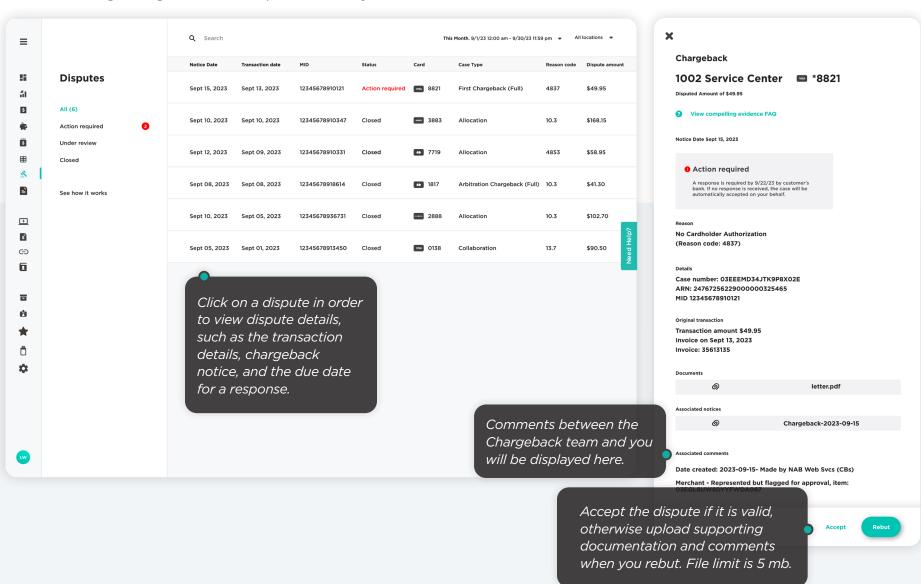
Reports.

View and export reporting data based on sales, customer activity, employee performance, and inventory. Reports are generated in .csv format.



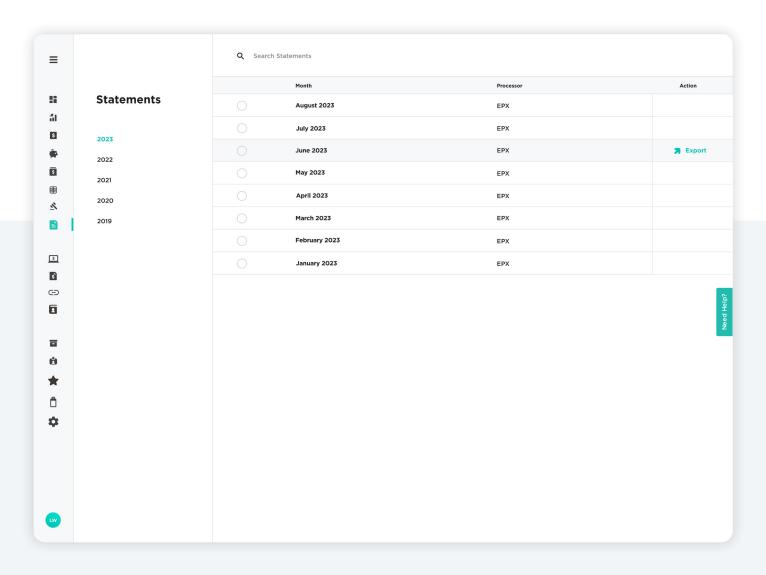
Disputes. 🖄

View and manage chargebacks, and dispute the ones you believe are not valid.



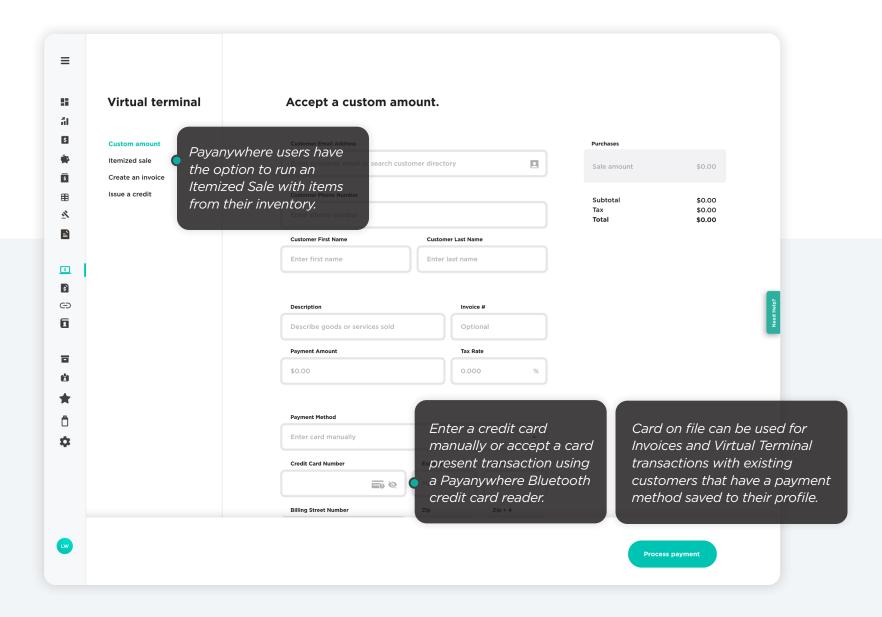
Statements.

Download a PDF copy of your monthly processing statements. They are sorted by year and you can use the search bar to find a specific statement.



Virtual Terminal.

Accept payments and send invoices using the Virtual Terminal. Standard processing rates apply.



Invoices. §

Manage and monitor your one-time and recurring invoices here. Set up your invoices, customer payment portal, and invoice activity alerts under Business Settings.



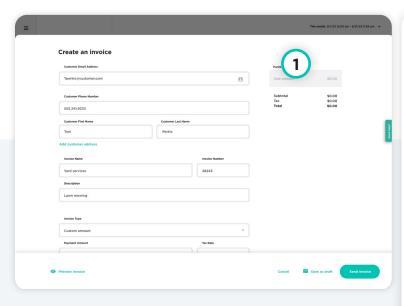
Create invoice.

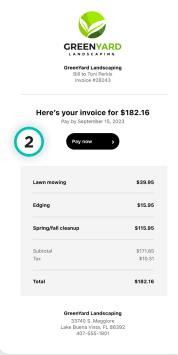


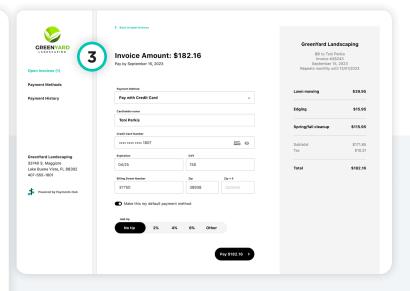
Your customer receives the invoice via email or SMS text with a link to their secure payment portal.



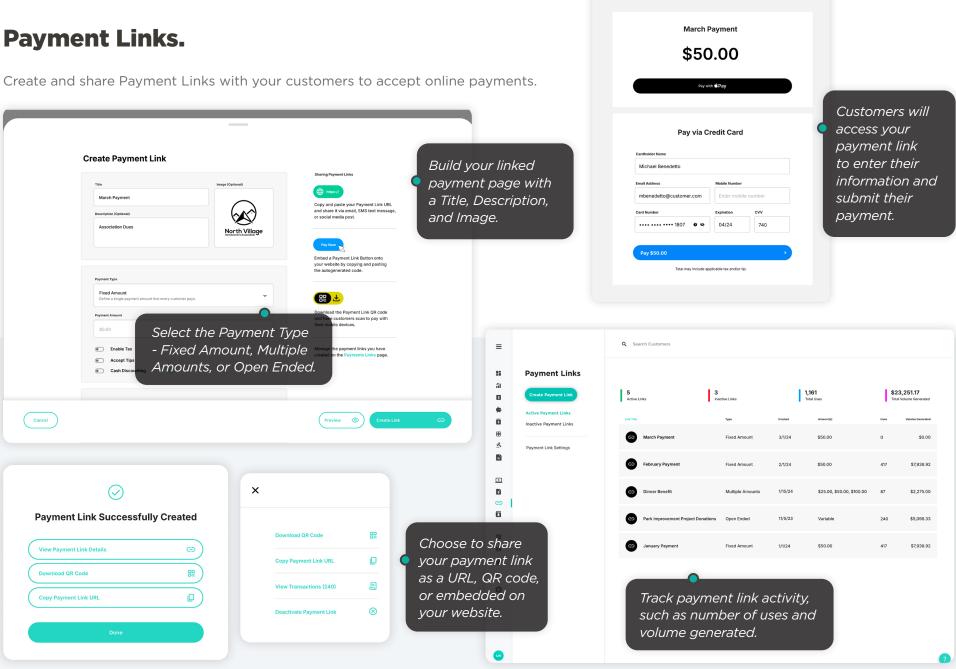
Your customer pays their invoice by entering their credit card information in the payment portal.







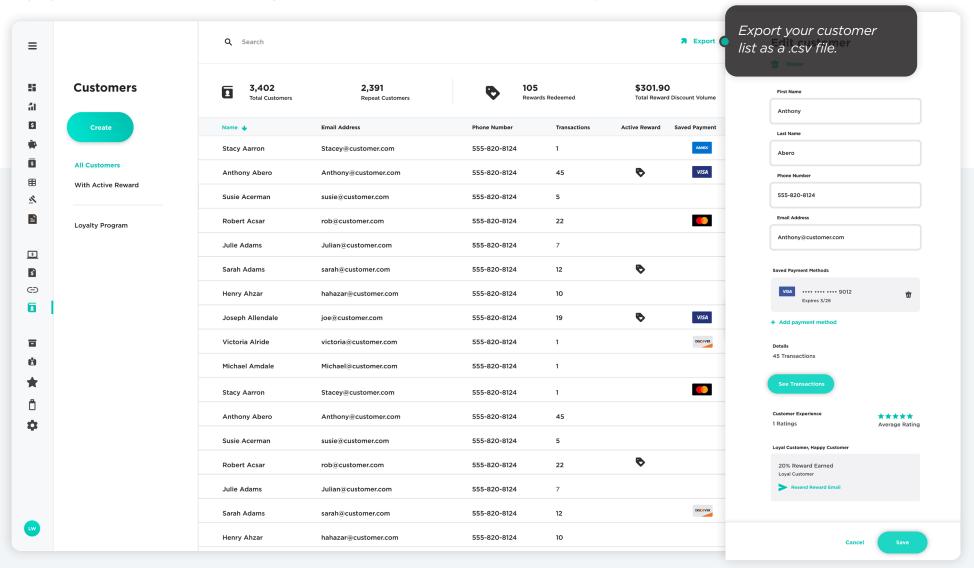
The payment portal also allows your customer to add saved payment methods, edit or delete an existing payment method, enable autopay for recurring invoices, and view their payment history.



North Village

Customers.

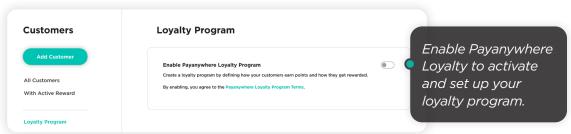
View and edit your customer directory with contact information, saved payment methods, and associated transactions. Payanywhere users with customer ratings enabled can see how customers rated their experience.

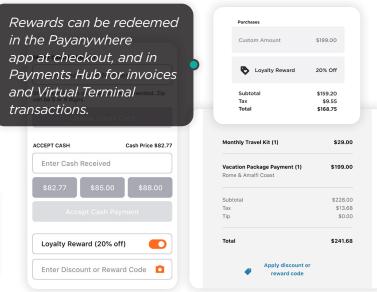


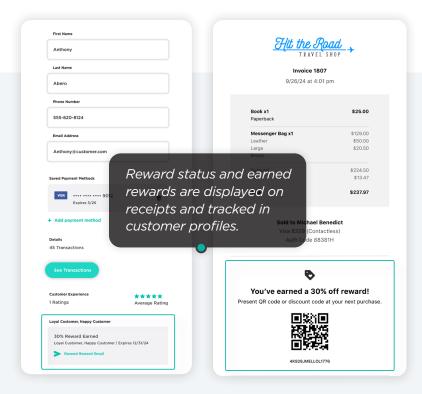
Customers — Loyalty Program. 💟

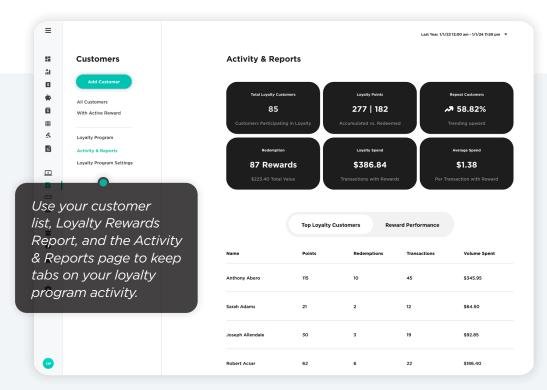


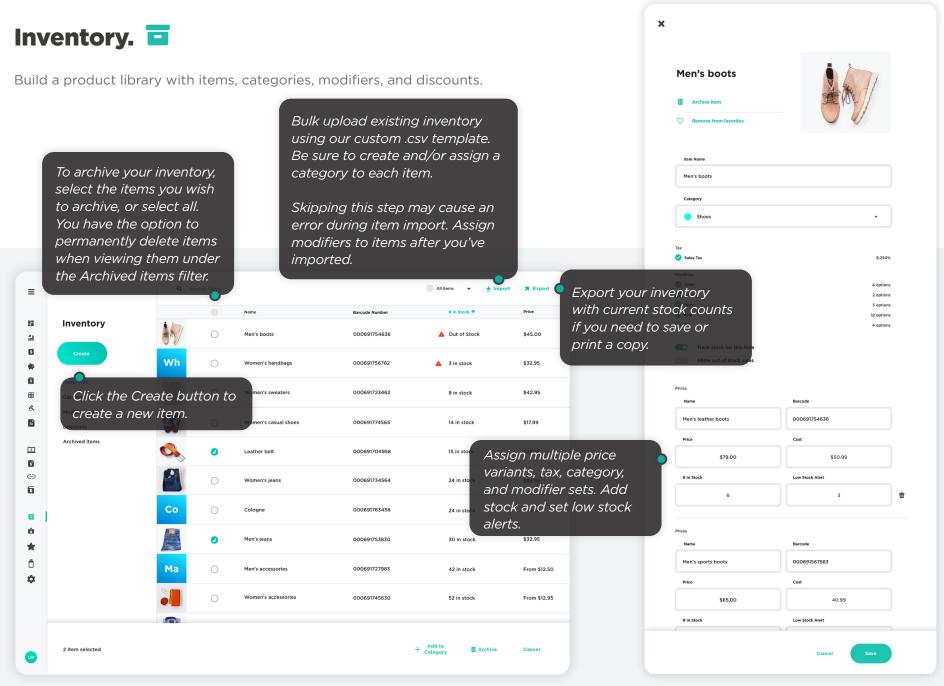
Build and manage your customer loyalty program with Payanywhere Loyalty. View the Payanywhere Loyalty Guide for more information.





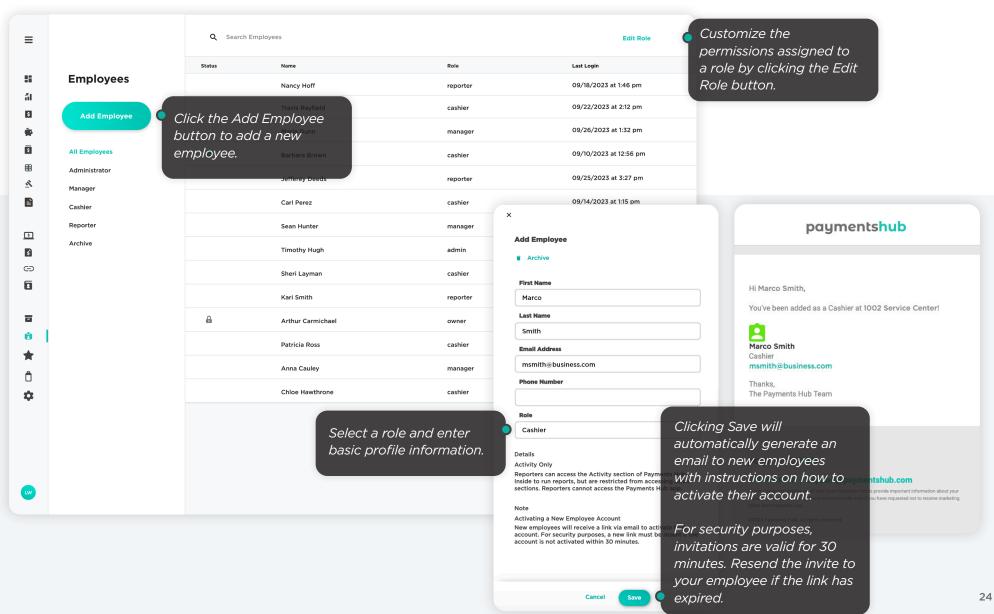






Employees.

Create and track employees and assign roles based on permission level.

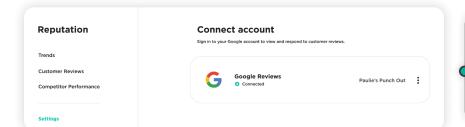


Employees Roles.

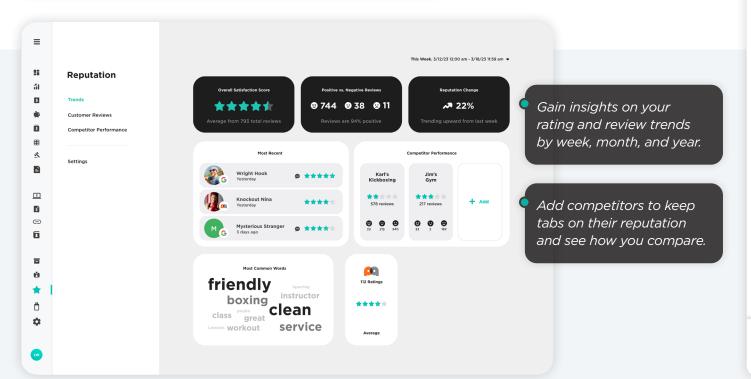
		Access Reporting	Payments	Manage Inventory
Ė	Owner Full access to the Payanywhere app and Payments Hub.	•	•	•
Ė	Administrator Full access to the Payanywhere app and Payments Hub. Cannot access Owner information.	•	•	•
Ė	Manager Full access to the Payanywhere app. Limited access to Payments Hub based on permission settings.			
Ė	Cashier Access to the Payanywhere app with limited permissions to accept payments. Cannot access Payments Hub.		Only on the Payanywhere app.	
	Reporter View and pull reports from Payments Hub. No access to the Payanywhere app.			

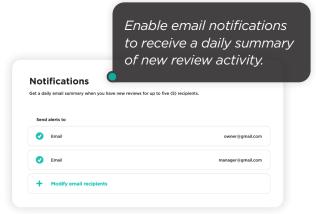
Reputation Management.

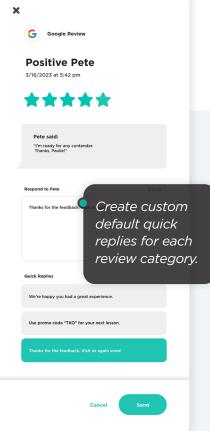
Manage customer satisfaction, monitor the competition, and build a stronger online reputation. View the **Reputation Management Guide** for more information.



Connect your Google
Business Profile to view
and reply to customer
reviews directly from
Payments Hub.

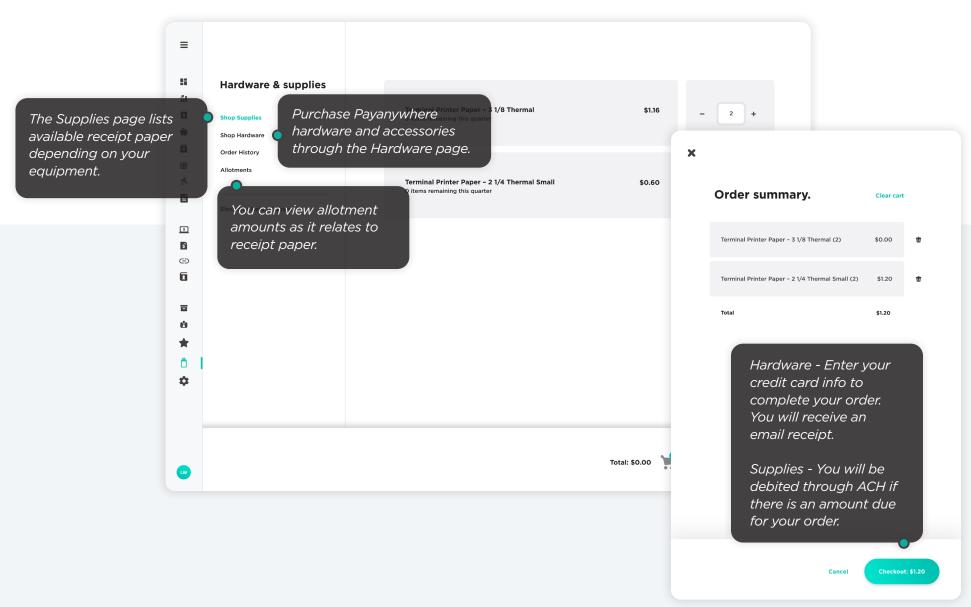






Hardware & Supplies. 📋

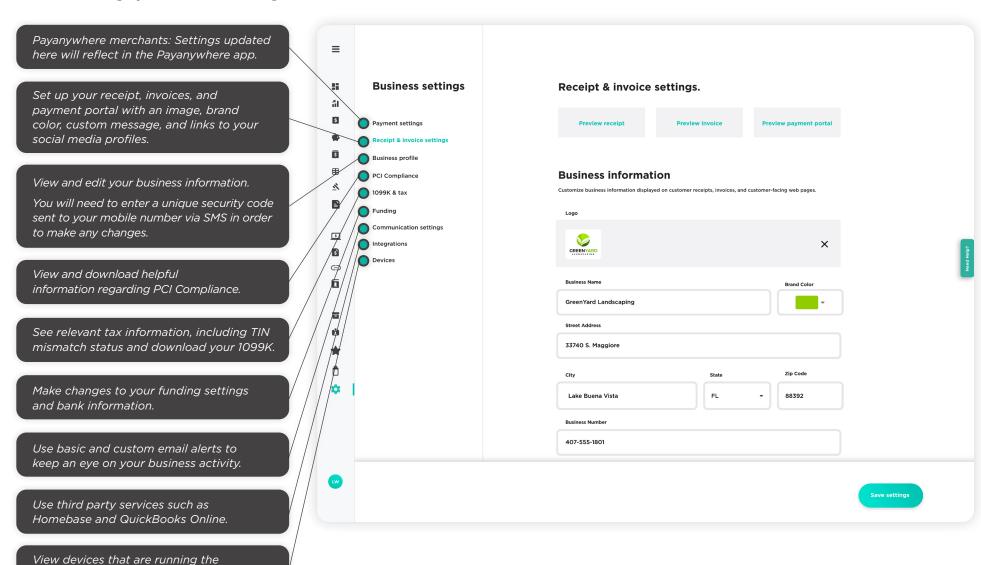
Order additional hardware, accessories, and supplies.



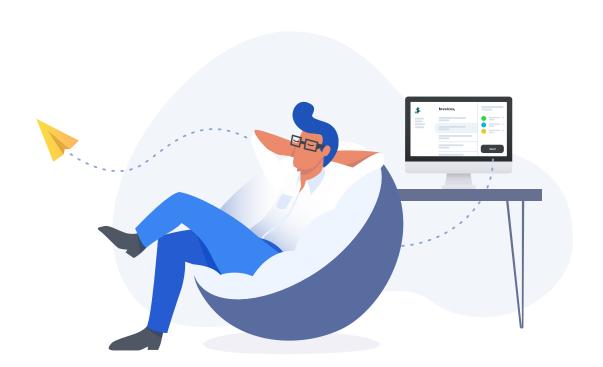
Business Settings.

Payanywhere app.

View and manage your Business Settings.



Using Payments Hub.



Log in.

Logging in.

You will use the email address and password you created at the time of enrollment to log in to Payments Hub. Registration is not required.



Merchants who are enrolled via Simplified Enrollment already have credentials and will use those to log in to the portal. Registration is not required.

Tip: Your username is your email address you used when enrolling. If you do not remember your password, reset your password here:

https://www.paymentshub.com/forgot-password



To reset a password: https://paymentshub.com/forgot-password

- Enter your email.
- You will receive an email with the subject line: "Reset your password."
- Click on the link within the email. This link expires 30 min from the time email was sent.
- Enter your MID, last 4 of SSN, and set a new password.
- For other employee roles, user only needs to enter the MID and set a new password.

Logging in for the first time.



When you log in to Payments Hub, you are prompted to accept the terms and conditions in order to continue. You will receive an email confirming your acceptance.

Log in.

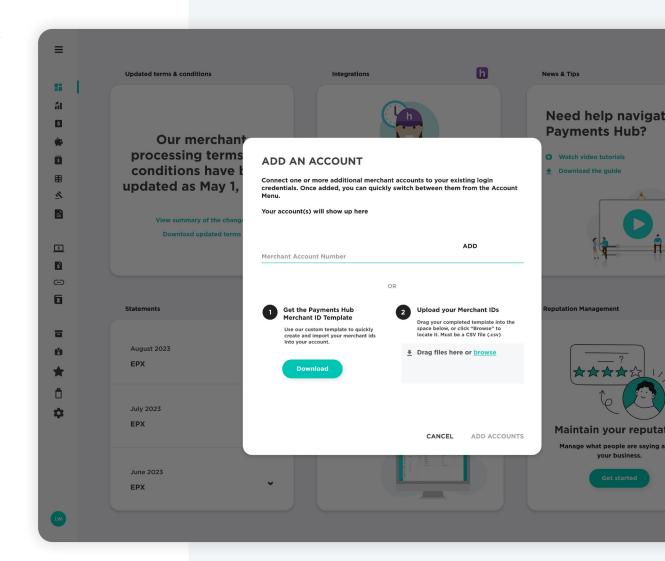
Adding MIDs to an account.

Using your existing credentials, you can link multiple accounts (MIDs), so you can log in to Payments Hub once and toggle between MIDs to view information across accounts.

To link an account:

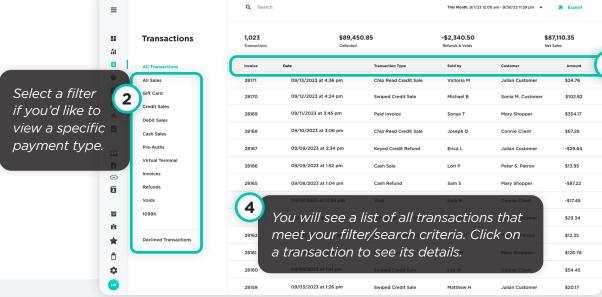
- **1.** At least one data element must match in order for the account to be added:
 - a) Owner Name & SSN
 - b) EIN
 - c) DBA
- 2. Owner or Admin will click Add an Account.
- 3. Enter in the MID and click Add.
- **4.** Or, if you have a large amount of MIDs, download and fill out the template. Drag the completed template back into the dialog.
- 5. Click Add Accounts.

Note: This functionality is currently not available to Payanywhere merchants.



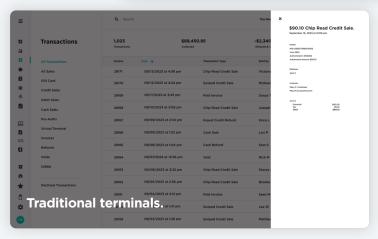
Transactions.

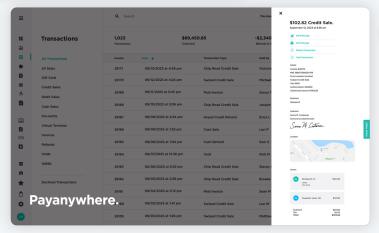
For traditional merchants, transactions display after you have batched. If you do not see any transactions on this page, click Open Batch to view a list of live credit card authorizations that have not yet settled. These transactions are pre-settlement and do not include refunds and cash transactions.



Payanywhere transactions sync in real time and will display any transactions that have been processed.

Open Transactions — Payanywhere only: Manual Close merchants can view and close their open transactions. If applicable, merchants using tip adjust may also add and save tips to their open transactions.



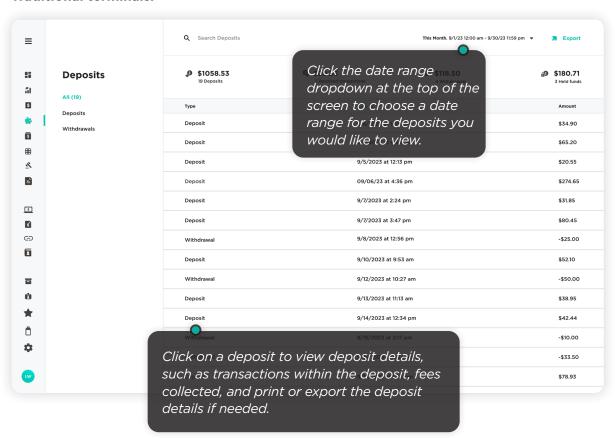


Depending on your account type and pricing, you may see different levels of detail in their transactions.

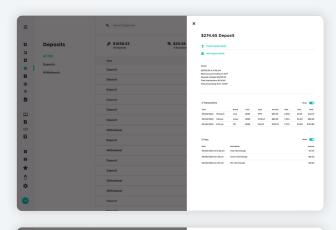
Deposits.

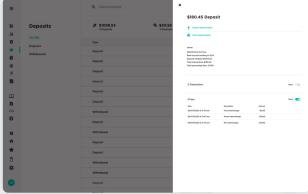
Deposits display after your transactions have settled. There may be a delay in viewing deposits if you have open batches or transactions under review.

Traditional terminals.



Payanywhere.

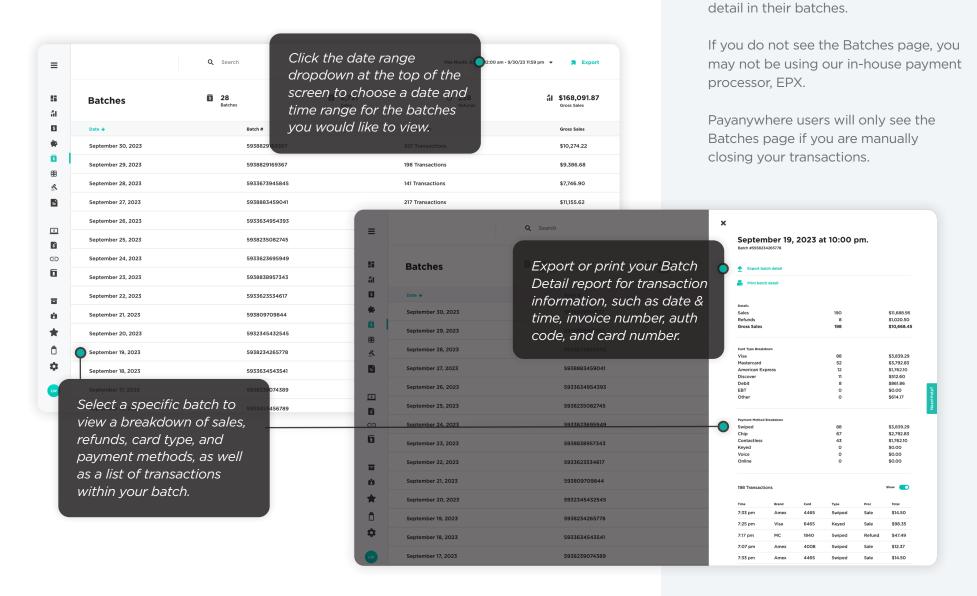




Depending on your account type and pricing, you may see different levels of detail in their transactions.

Batches.

A batch is the sum of all the authorized credit card transactions for the day at the close of business, or by the designated batch closing time.



Depending on your account type and

pricing, you may see different levels of

Payments Hub app.

Payments Hub: Business Manager is a mobile app available on iOS and Android devices.

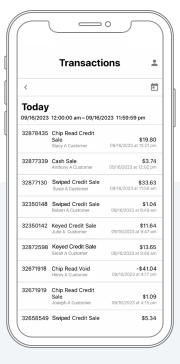


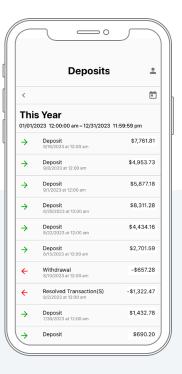


You can log in to the Payments Hub app with your Payanywhere credentials to view your Transactions, Deposits, and Batches (if applicable) right from your phone or tablet.











Accepting a payment.

Virtual Terminal.

Virtual Terminal transactions are considered keyed transactions, unless you're using a Payanywhere Bluetooth Credit Card Reader for in-person payments.

Owners and Admins have access to accepting Virtual Terminal transactions. An Owner or Admin must enable the Manager role to accept Virtual Terminal transactions through Employees \rightarrow Manager \rightarrow Edit Role.

You can also create and send invoices directly from the Virtual Terminal.

To accept a payment using the Virtual Terminal:

- **1.** Enter in your customer's information, including an email and/or mobile number if they would like to receive a receipt.
- 2. Enter in the transaction information.
 - Payanywhere users have the option to run an Itemized Sale with items from their inventory.
- 3. Enter in your customer's payment information.
 - a) By default, the credit card number will be masked. Click the "eye" icon in order to see the numbers.
 - b) We recommend entering in the billing street number and zip code to help protect you with potential disputes.
 - c) For existing customers with a card on file, you will have the option to select their Saved Payment Method to complete the transaction.
- 4. Click Process Payment.

Note: Payanywhere merchants with Cash Discounting enabled can choose to add the Cash Discounting amount to their Virtual Terminal transaction. This will charge the customer the Credit price as opposed to the Cash price entered.

To accept a payment using the Virtual Terminal and a Payanywhere Bluetooth Credit Card Reader:

- 1. Click Virtual Terminal.
- **2.** Enter your customer's information and transaction information.
- **3.** Select Use a Card Reader under Payment Method.
 - a) Make sure the Payanywhere app driver has been downloaded previously.



- **4.** Click Start Reader and wait for reader to initiate.
- **5.** Insert or swipe the card.







What you'll need.

- Payanywhere 2-in-1 or 3-in-1 Bluetooth Credit Card Reader.
- Download the Payanywhere app driver to your computer.
- A USB cord if you're connecting via USB. Mac users can connect via Bluetooth if needed.
- We recommend using Chrome.

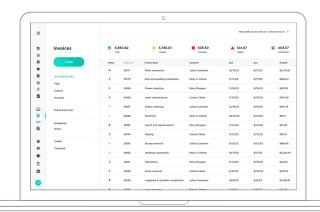


Accepting a payment.

Invoices.

Invoices is a feature available only to those on the Premium plan. Invoice payments are considered keyed payments.

Owners and Admins have access to creating and sending Invoices. An Owner or Admin must enable the Manager role to access Invoices through Employees \rightarrow Manager \rightarrow Edit Role.





To send an invoice:

- 1. Create an invoice from the Virtual Terminal or Invoices page.
- 2. Fill in the customer's information. Be sure to include their email address or phone number as this is how the invoice will be sent.
- 3. Enter in purchase details, such as amount, description, and whether the purchase is taxable or not.
 - Payanywhere users have the option to create an itemized invoice with items from their inventory. You can also enter a card manually or use a card on file as the payment method.
- 4. Select the Send and Due Date.
 - · For recurring invoices, select Recurring under Frequency, then choose how often it repeats and optional Last Send Date.
- 5. Click Send Invoice.
 - a) Save the invoice as a draft if you are not ready to send yet.



Your customer will receive the invoice via email or SMS text.

- 1. Your customer will click the link provided to submit a payment.
 - a) The link takes the customer to a secure payment portal where they can enter their card information.
 - b) Customers can add their card as a Saved Payment Method for future invoices, as well as enroll in autopay if they are receiving recurring invoices.
 - c) Payanywhere users with tips enabled can choose to allow customers to add a tip to their invoice payment.
- 2. After a customer submits their payment, they will receive a receipt.



To resend an overdue invoice:

- 1. Select the invoice.
- 2. Click Resend. Your customer will receive the invoice via email.



To update the payment amount on an invoice:

- 1. Select the invoice.
- 2. Click Edit payment amount. Your Customer will receive a notice that their invoice amount has changed.
 - For recurring invoices, you can choose to update the payment for the next invoice or all future invoices in the series.



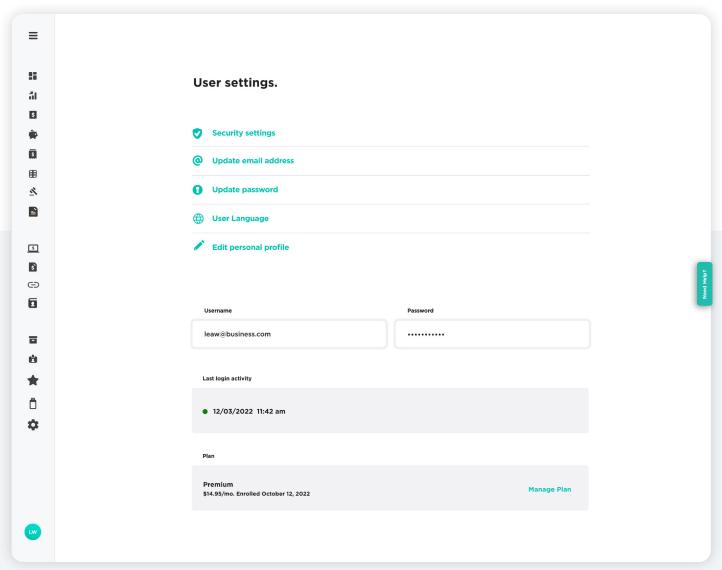
To cancel an invoice:

- 1. Select the invoice you would like to cancel.
- 2. Click cancel.

Updating information.

Updating User Settings.

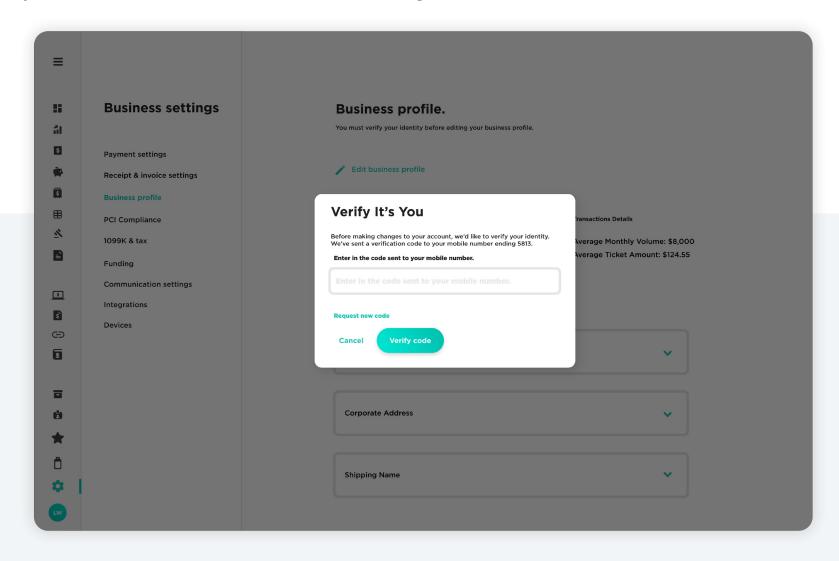
You can update your login information and downgrade/upgrade your Payments Hub plan on this page.



Updating information.

Updating Business Settings.

In order to update business information, such as banking information, the Owner will be required to complete the two factor authentication process by entering the code sent to their mobile number. Note: You will need to contact your Sales Partner or Customer Service in order to make changes to owner information.

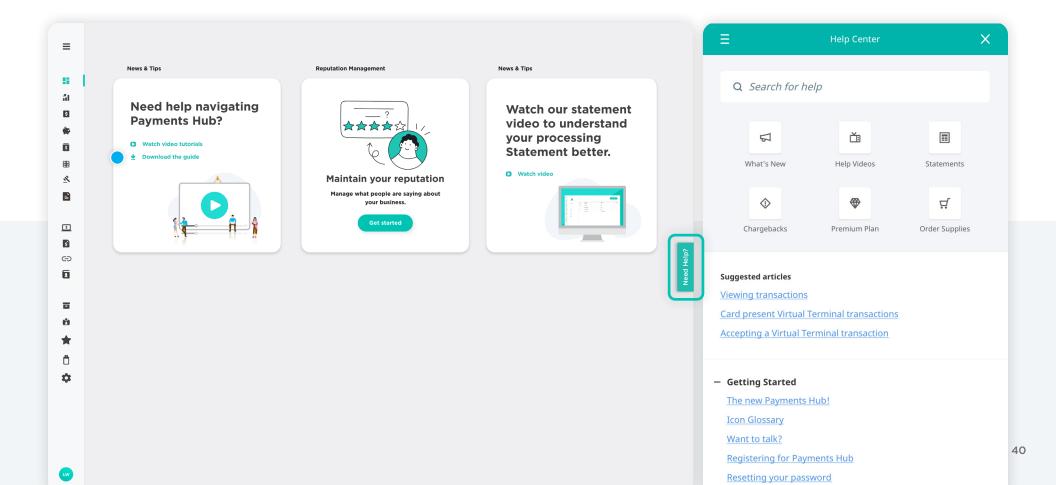


Help.

Included in the portal is an integrated help resource that provides step-by-step instructions, assisting you with all of the functionality available to you. You can view this information by clicking on the blue hot spots sprinkled throughout the portal, or by accessing the "Need Help?" tab stationed at the right side of the screen.

Check out our Vimeo channel for useful tutorial videos.

https://vimeo.com/user47072975



paymentshub