

paymentshub

Your guide to your business command center.

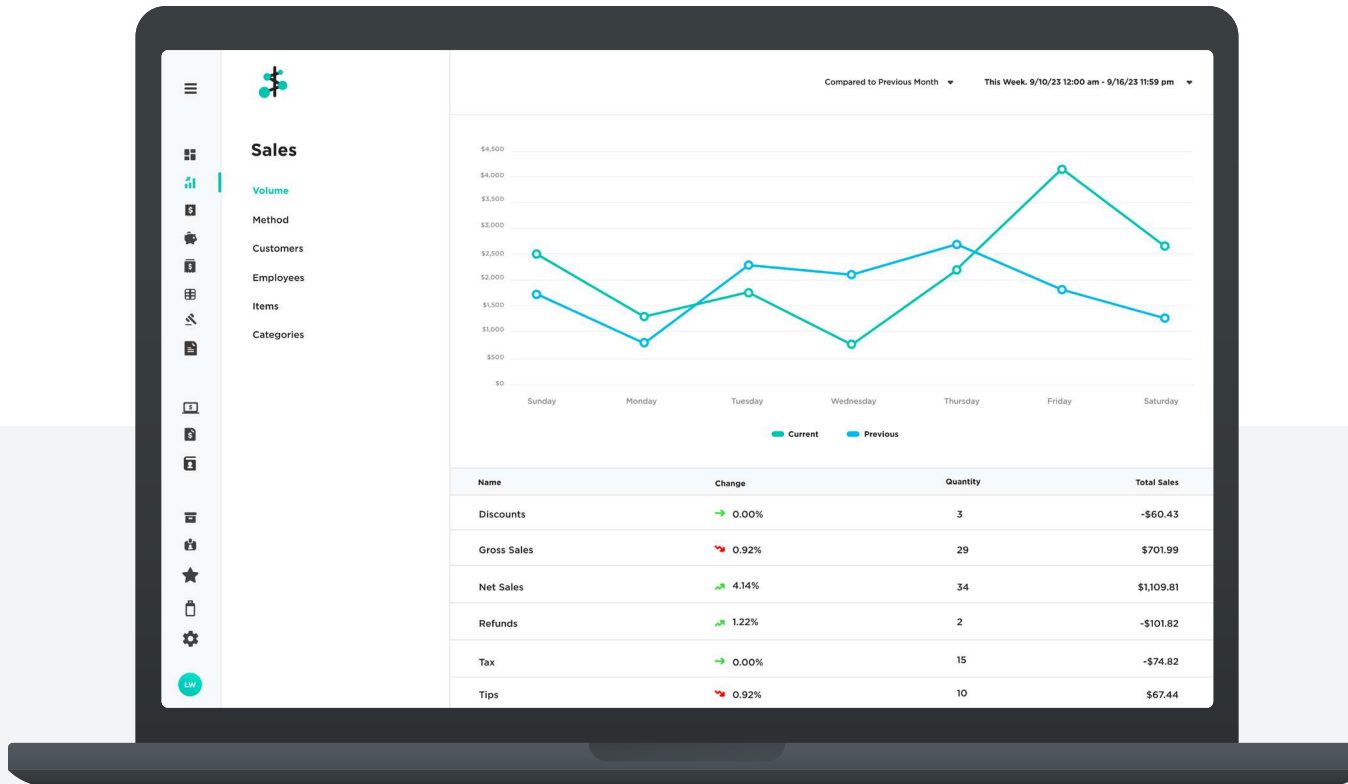


Table of contents

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

Customers 20

Business Management

Inventory 21

Employees 22

Employees Roles 23

Reputation 24

Hardware & Supplies 25

Business Settings 26

Using Payments Hub 27

Log in

Logging in 28

Adding MIDs to an account 29

Viewing processing activity

Transactions 30

Deposits 31

Batches 32

Payments Hub app 33

Accepting a payment

Virtual Terminal 34

Invoices 35

Updating information

Updating user settings 36

Updating business settings 37

Help

38

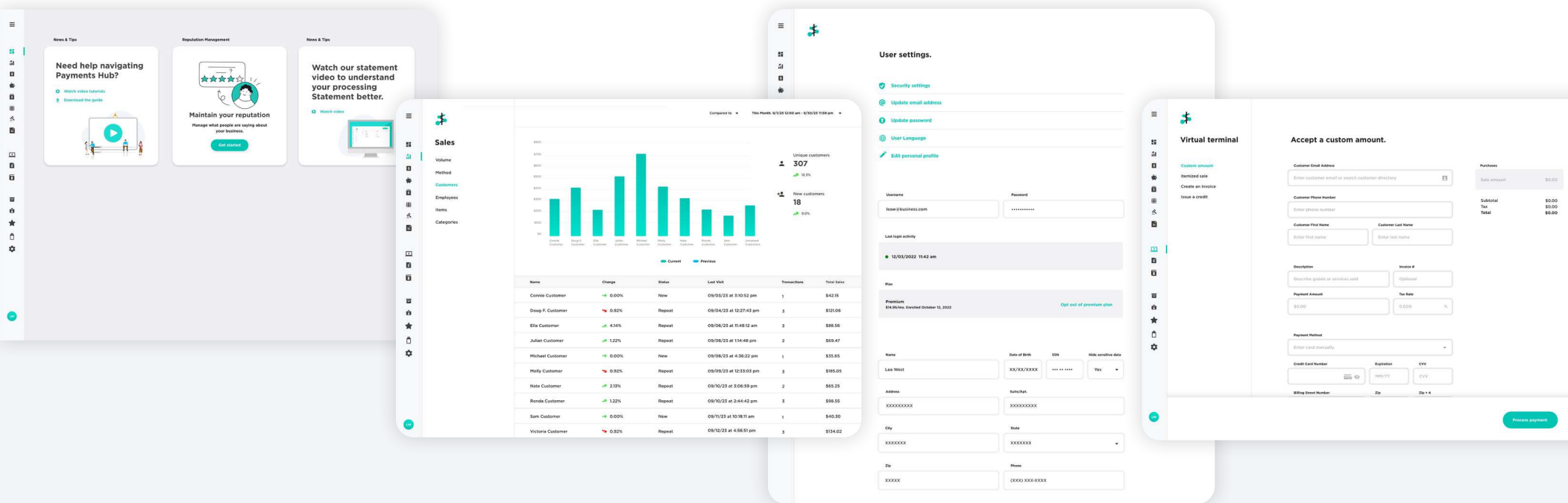
About Payments Hub.



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. For example, the Inventory and Customers pages are only visible for Payanywhere merchants and Invoices is a feature exclusive to the Premium plan.



Plans & pricing.

Payments Hub offers a Free and Premium plan.

New merchants are automatically enrolled in a 60-day free trial of the Premium plan. After the trial, you will be charged \$14.95/mo, unless you choose to downgrade to the Free plan.

Note: Features listed apply to EPX accounts only.

		Free \$0.00/mo	Premium \$14.95/mo	Payanywhere Pay As You Go Premium \$0.00/mo	Payanywhere Custom Pricing Free \$0.00/mo	Payanywhere Custom Pricing Premium \$14.95/mo
Dashboard		✓	✓	✓	✓	✓
Sales		✓	✓	✓	✓	✓
Transactions		✓	✓	✓	✓	✓
Batch		✓	✓	✓	✓	✓
Deposits		✓	✓	✓	✓	✓
Reports		✓	✓	✓	✓	✓
Statements		✓	✓	✓	✓	✓
Employees		✓	✓	✓	✓	✓
Virtual Terminal		✓	✓	✓	✓	✓
Invoices			✓	✓		✓
Reputation Management			✓	✓		✓
Disputes		✓	✓	✓	✓	✓
Inventory				✓	✓	✓
Free Paper Allotment			✓	✓	✓	✓
Free Ground Shipping			✓	✓		✓
Terminal Warranty			✓	✓		✓

Getting started.

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, 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.

The screenshot shows the Payments Hub interface. At the top left is a hamburger menu icon (☰) and a logo. The main navigation menu is divided into four sections, each highlighted with a red box and a circled number:

- 1 Activity**: Dashboard, Sales, Transactions, Deposits, Batches, Reports, Disputes, Statements.
- 2 Payments**: Virtual Terminal, Billing & Invoices, Customers.
- 3 Business Management**: Inventory, Employees, Reputation, Hardwares & Supplies, Business Settings.
- 4 User Settings**: A dropdown menu showing the user's name 'Lea West'.

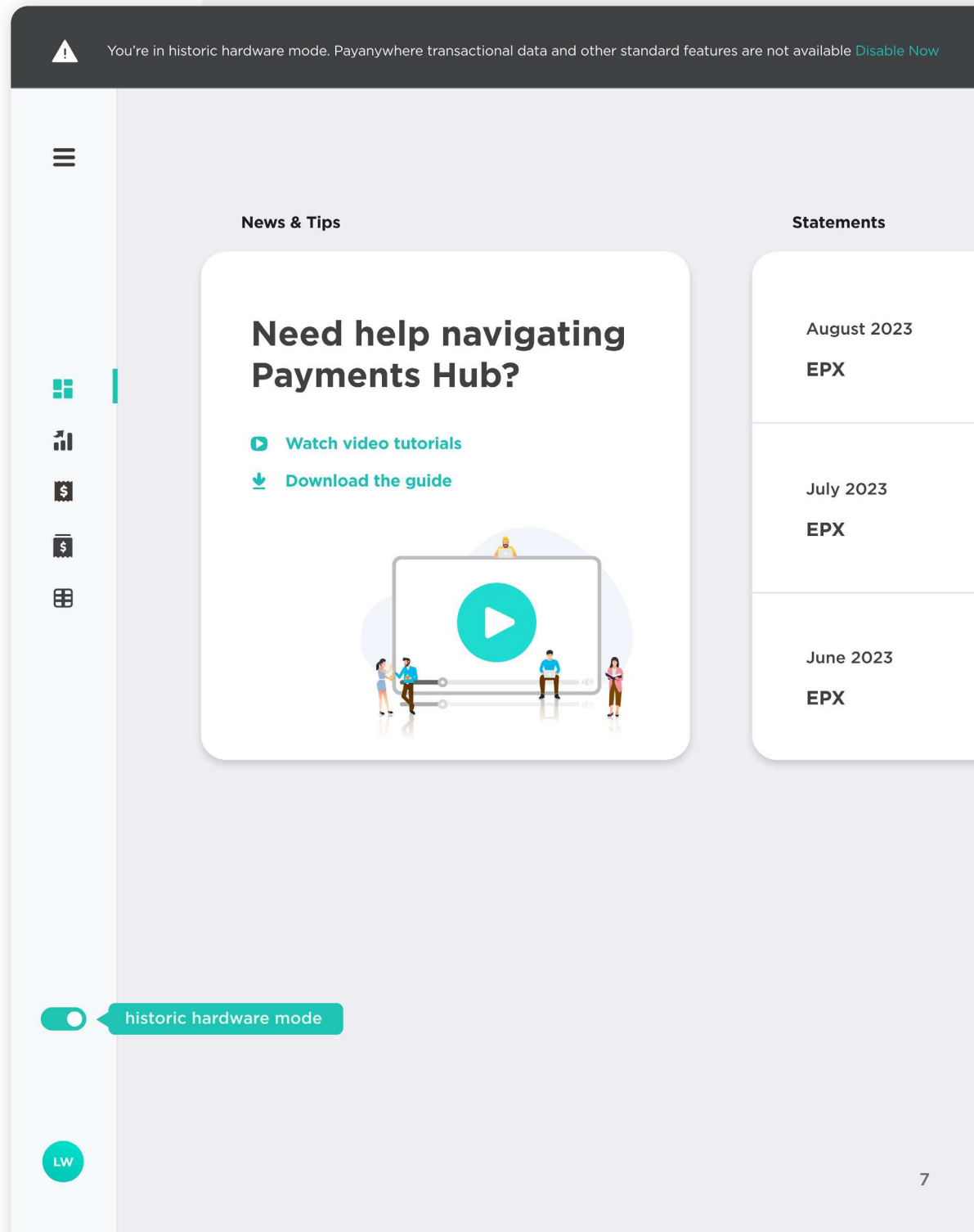
Below the menu is a toggle switch for 'Enable historic hardware mode'. At the bottom left is a user profile card for 'Lea West, Owner' with a circular icon containing 'LW'. On the right side, there is a 'News & Tips' section with a card titled 'Need help navigating Payments Hub?' containing links for 'Watch video tutorials' and 'Download the guide'. Below this is a 'User Settings' panel with options for 'User Settings', 'Live Chat', and 'Log Out' (with an external link icon).

Getting started.

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.



Getting started.

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.

The screenshot shows a dashboard with a left sidebar, a top toolbar, and a main table. The sidebar contains a menu icon, a logo, and a list of transaction categories. The toolbar includes a search bar, a date range selector, and an export button. The table displays transaction data with columns for Invoice, Date, Transaction Type, Sold by, Customer, and Amount. A sorting bar is visible above the table columns.

Invoice	Date	Transaction Type	Sold by	Customer	Amount
28171	09/13/2023 at 4:36 pm	Chip Read Credit Sale	Victoria M	Julian Customer	\$24.76
28170	09/12/2023 at 4:24 pm	Swiped Credit Sale	Michael B	Sonia M. Customer	\$102.82
28169	09/11/2023 at 3:45 pm	Paid Invoice	Sonya T	Mary Shopper	\$354.17
28168	09/10/2023 at 3:06 pm	Chip Read Credit Sale	Joseph D	Connie Client	\$67.26
28167	09/09/2023 at 2:34 pm	Keyed Credit Refund	Erica L	Julian Customer	-\$29.64
28166	09/09/2023 at 1:52 pm	Cash Sale	Lori P	Peter S. Patron	\$13.95
28165	09/08/2023 at 1:04 pm	Cash Refund	Sam S	Mary Shopper	-\$87.22
28164	09/07/2023 at 12:36 pm	Void	Nick M	Connie Client	-\$17.45
28163	00/06/2023 at 3:32 pm	Chip Read Credit Sale	Stacey P	Julian Customer	\$29.34
28162	09/05/2023 at 2:56 pm	Chip Read Credit Sale	Brooke T	Peter S. Patron	\$12.35
28161	09/04/2023 at 2:12 pm	Paid Invoice	Sean M	Mary Shopper	\$126.78
28160	09/03/2023 at 1:41 pm	Swiped Credit Sale	Lea W	Connie Client	\$54.45
28159	09/03/2023 at 1:26 pm	Swiped Credit Sale	Matthew H	Julian Customer	\$20.17
28158	09/02/2023 at 12:50 pm	Keyed Credit Sale	Fred R	Peter S. Patron	\$66.78

Getting started.

User Settings. XX

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

The screenshot shows the 'User settings' page. On the left is a navigation sidebar with items: Dashboard, Sales, Transactions, Deposits, Payments, Virtual Terminal, Billing & Invoices, Customers, Inventory, Employees, Reputation, Hardwares & Supplies, and Business Settings. The main content area is titled 'User settings.' and contains several sections:

- Security settings:** Includes 'Update email address' and 'Update password'. A callout box points to these two options with the text: 'Update your email and password that you use to log in to Payments Hub and/or the Payanywhere app.'
- User Language:** A link to change the interface language.
- Edit personal profile:** A link to update personal information.

Below these links are input fields for 'Username' (leaw@business.com) and 'Password' (masked with dots). A 'Last login activity' section shows a login on 12/03/2022 at 11:42 am. The 'Plan' section shows 'Premium' at \$14.95/mo, enrolled on October 12, 2022, with an 'Opt out of premium plan' link.

At the bottom, there are fields for 'Name' (Lea West), 'Date of Birth' (XX/XX/XXXX), 'SSN' (masked), and 'Hide sensitive data' (Yes). There are also fields for 'Address' and 'Suite/Apt.'.

Two callout boxes provide additional information:

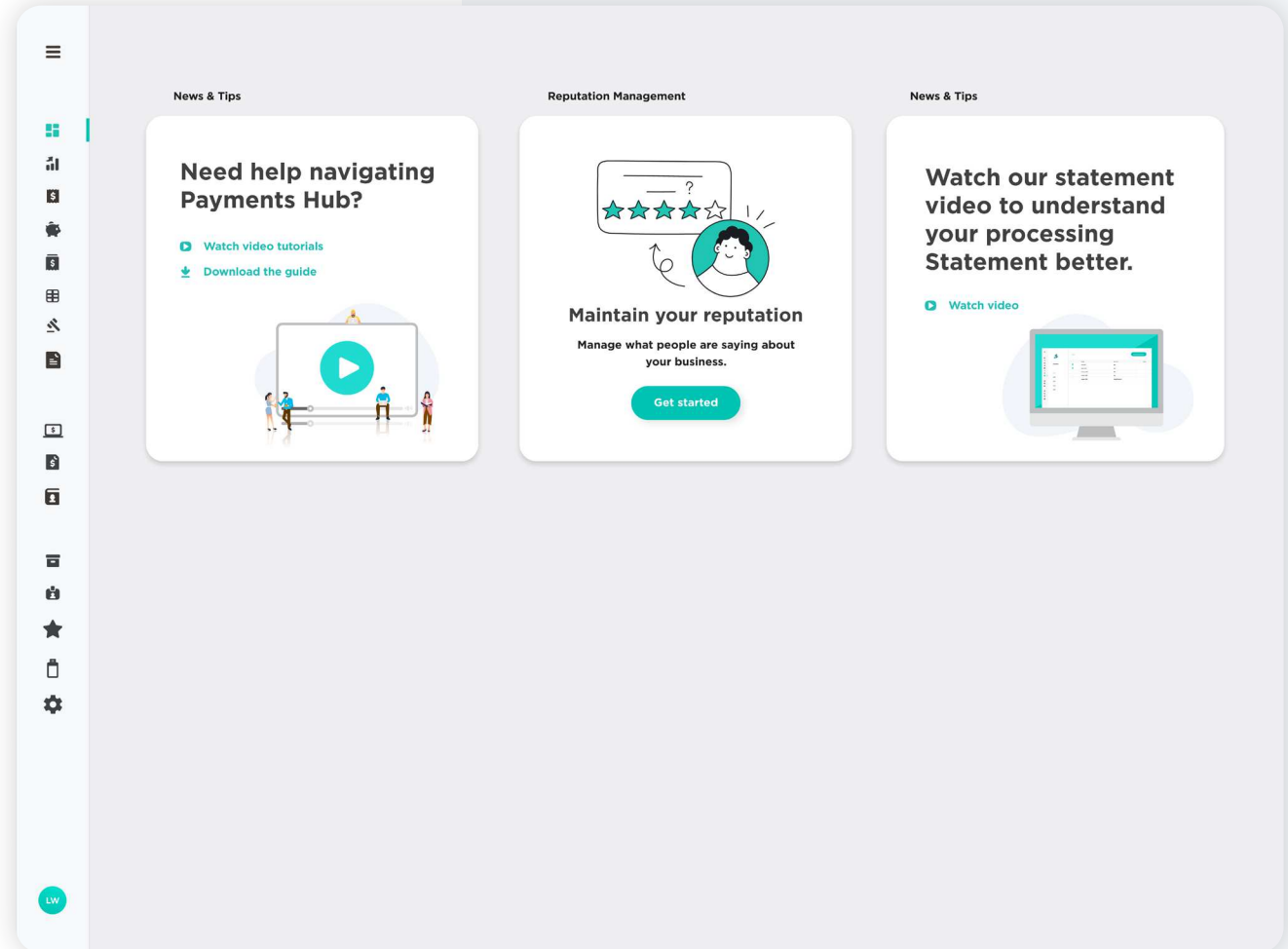
- One points to the 'Business Settings' menu item: 'View or edit your Payments Hub plan information.'
- Another points to the 'Update email address' and 'Update password' options: 'Add your mobile number for two-factor authentication. When you make edits to your account information, you will be prompted for a unique code sent by SMS text.'

The user profile 'Lea West' is shown in the bottom left corner, with a red box around the profile icon.

Activity.

Dashboard.

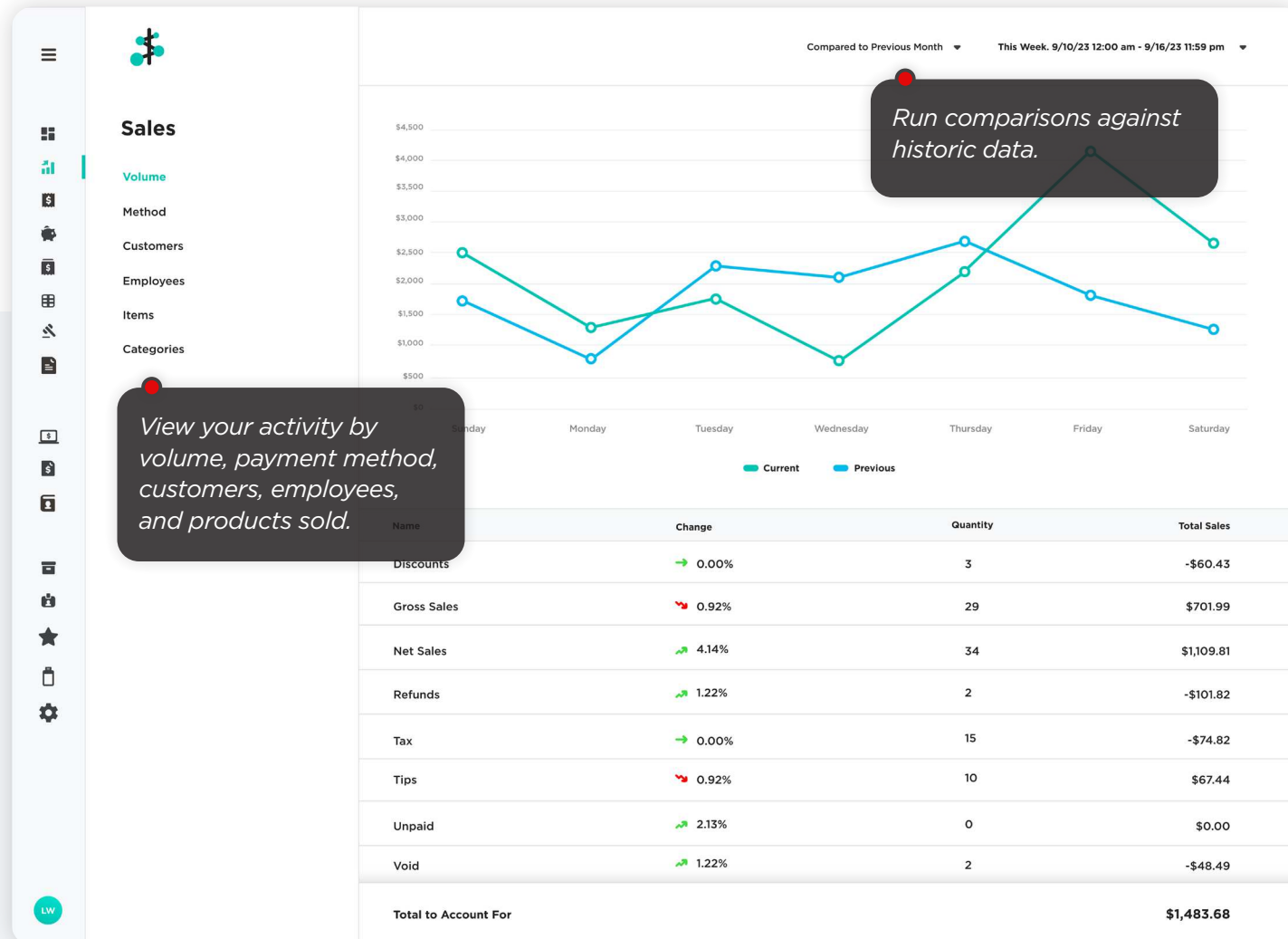
This is the default home screen when you log in. Here you'll see shortcut widgets to your statements and other helpful information.



Activity.

Sales.

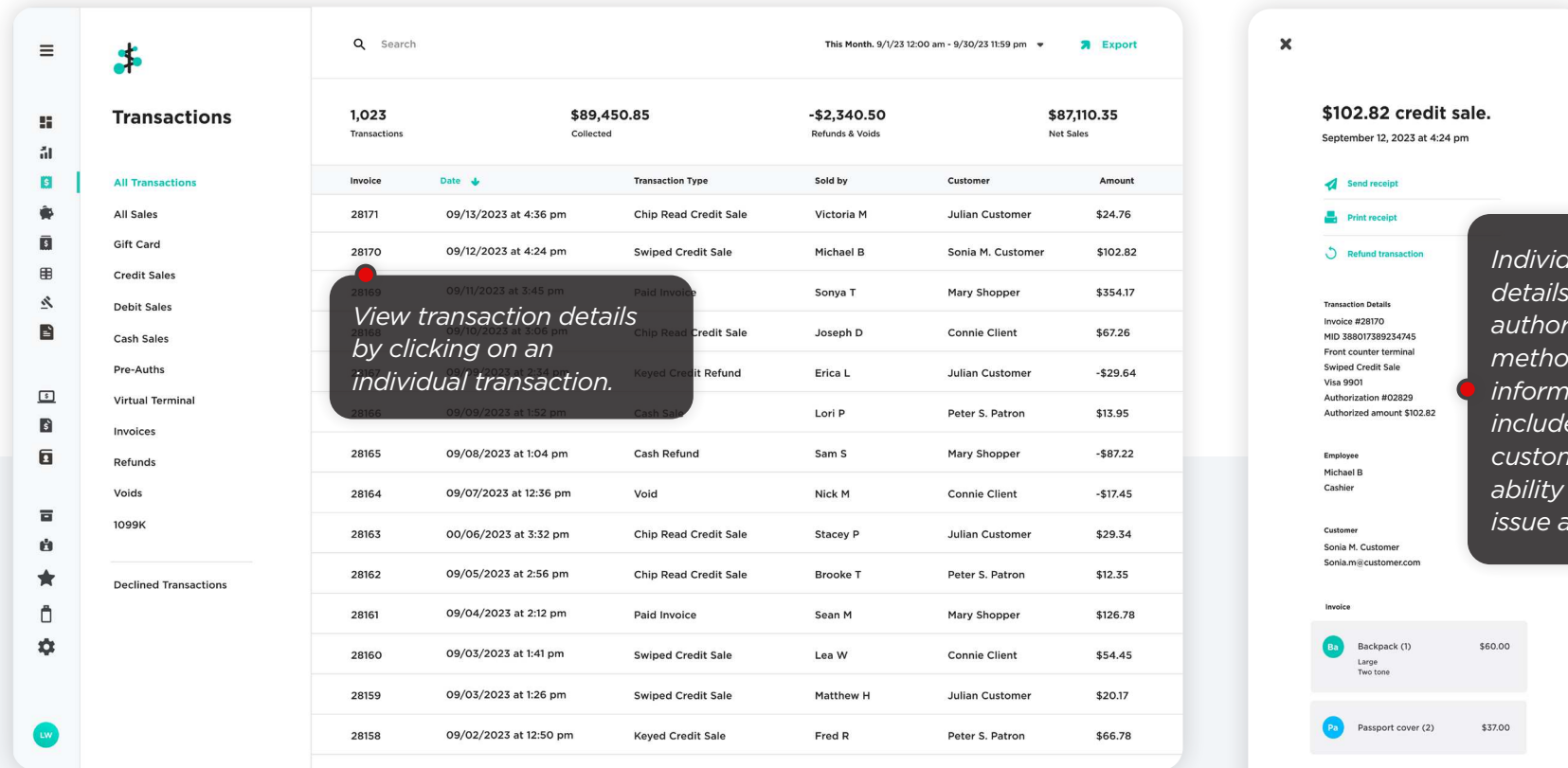
See a breakdown of your sales activity with the help of charts and graphs.



Activity.

Transactions.

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



The screenshot displays the Transactions page interface. On the left is a sidebar with navigation icons and a 'Transactions' section. The main area shows a summary for 'This Month, 9/1/23 12:00 am - 9/30/23 11:59 pm' with 1,023 transactions, \$89,450.85 collected, -\$2,340.50 in refunds/voids, and \$87,110.35 in net sales. A table lists individual transactions with columns for Invoice, Date, Transaction Type, Sold by, Customer, and Amount. A callout box highlights a transaction for invoice 28170, stating: 'View transaction details by clicking on an individual transaction.' To the right, a detailed view of this transaction shows it is a \$102.82 credit sale from September 12, 2023, at 4:24 pm. It includes options to 'Send receipt', 'Print receipt', and 'Refund transaction'. Transaction details include invoice #28170, MID 388017389234745, and a Visa 9901 payment method. Employee information for Michael B. Cashier and customer information for Sonia M. Customer are also shown. An invoice breakdown lists 'Backpack (1) Large Two tone' for \$60.00 and 'Passport cover (2)' for \$37.00, with a subtotal of \$97.00, tax of \$5.82, and a total of \$102.82.

Invoice	Date	Transaction Type	Sold by	Customer	Amount
28171	09/13/2023 at 4:36 pm	Chip Read Credit Sale	Victoria M	Julian Customer	\$24.76
28170	09/12/2023 at 4:24 pm	Swiped Credit Sale	Michael B	Sonia M. Customer	\$102.82
28169	09/11/2023 at 3:45 pm	Paid Invoice	Sonya T	Mary Shopper	\$354.17
28168	09/11/2023 at 3:08 pm	Chip Read Credit Sale	Joseph D	Connie Client	\$67.26
28167	09/11/2023 at 2:34 pm	Keyed Credit Refund	Erica L	Julian Customer	-\$29.64
28166	09/09/2023 at 1:52 pm	Cash Sale	Lori P	Peter S. Patron	\$13.95
28165	09/08/2023 at 1:04 pm	Cash Refund	Sam S	Mary Shopper	-\$87.22
28164	09/07/2023 at 12:36 pm	Void	Nick M	Connie Client	-\$17.45
28163	00/06/2023 at 3:32 pm	Chip Read Credit Sale	Stacey P	Julian Customer	\$29.34
28162	09/05/2023 at 2:56 pm	Chip Read Credit Sale	Brooke T	Peter S. Patron	\$12.35
28161	09/04/2023 at 2:12 pm	Paid Invoice	Sean M	Mary Shopper	\$126.78
28160	09/03/2023 at 1:41 pm	Swiped Credit Sale	Lea W	Connie Client	\$54.45
28159	09/03/2023 at 1:26 pm	Swiped Credit Sale	Matthew H	Julian Customer	\$20.17
28158	09/02/2023 at 12:50 pm	Keyed Credit Sale	Fred R	Peter S. Patron	\$66.78

\$102.82 credit sale.
September 12, 2023 at 4:24 pm

Transaction Details
Invoice #28170
MID 388017389234745
Front counter terminal
Swiped Credit Sale
Visa 9901
Authorization #02829
Authorized amount \$102.82

Employee
Michael B
Cashier

Customer
Sonia M. Customer
Sonia.m@customer.com

Invoice

Backpack (1) Large Two tone	\$60.00
Passport cover (2)	\$37.00

Subtotal \$97.00
Tax \$5.82
Total \$102.82

Individual transaction details include amount authorized, payment method, and payment information, and may also include items purchased, customer information, the ability to send a receipt or issue a refund, 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.

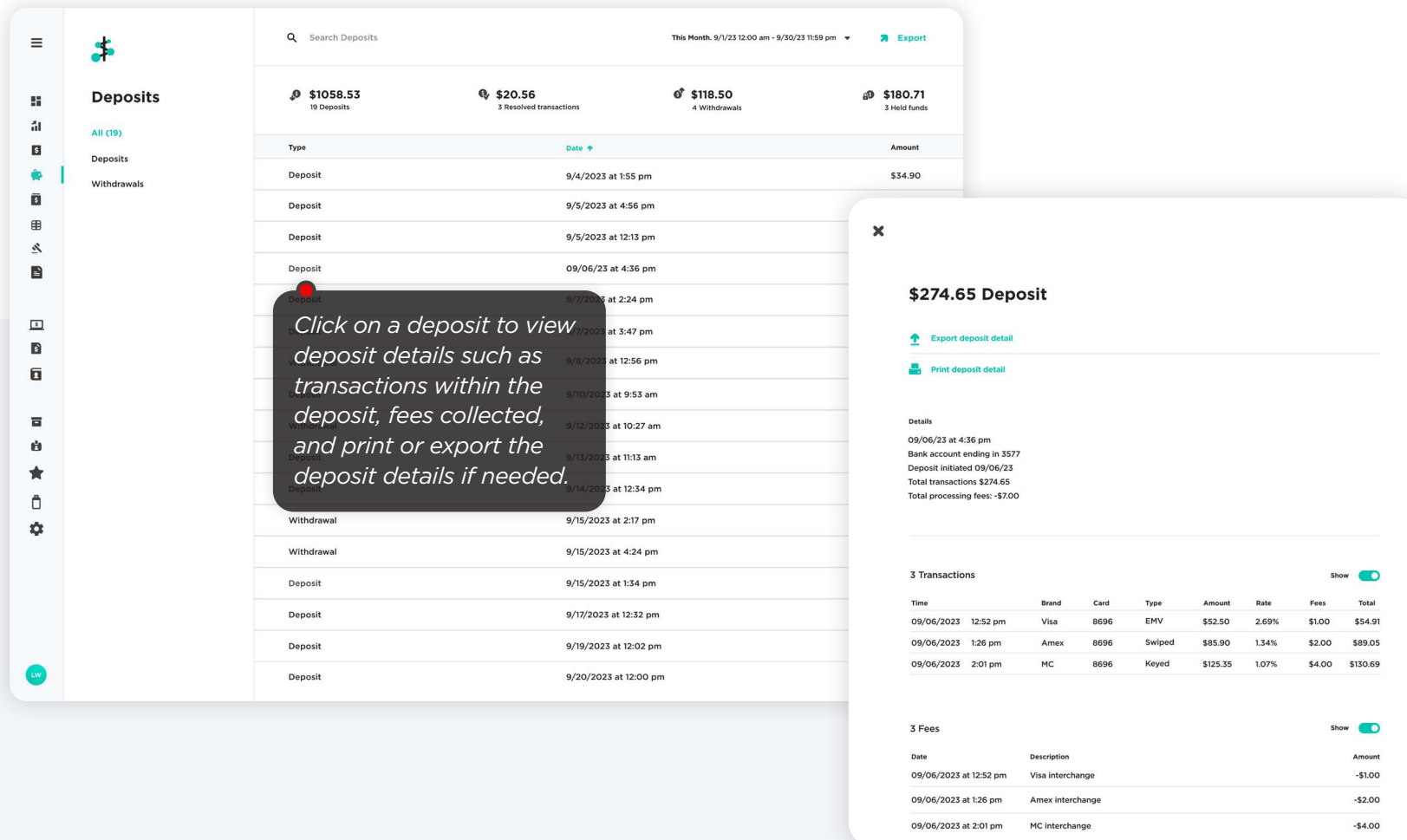
Open Transactions — Payanywhere only: Manual Close merchants can view and close their open transactions. If applicable, merchants using tip adjust may also add and save tips to their open transactions.

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

Activity.

Deposits.

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



The screenshot displays a banking application interface. On the left is a navigation sidebar with icons for menu, deposits, withdrawals, and other account features. The main content area shows a 'Deposits' summary with a search bar and filters for 'This Month: 9/1/23 12:00 am - 9/30/23 11:59 pm'. Summary statistics include: \$1058.53 (19 Deposits), \$20.56 (3 Resolved transactions), \$118.50 (4 Withdrawals), and \$180.71 (3 Held funds). Below this is a table of deposit transactions.

Type	Date	Amount
Deposit	9/4/2023 at 1:55 pm	\$34.90
Deposit	9/5/2023 at 4:56 pm	
Deposit	9/5/2023 at 12:13 pm	
Deposit	09/06/23 at 4:36 pm	
Deposit	9/7/2023 at 2:24 pm	
Deposit	9/7/2023 at 3:47 pm	
Deposit	9/9/2023 at 12:56 pm	
Deposit	9/10/2023 at 9:53 am	
Deposit	9/12/2023 at 10:27 am	
Deposit	9/13/2023 at 11:13 am	
Deposit	9/14/2023 at 12:34 pm	
Withdrawal	9/15/2023 at 2:17 pm	
Withdrawal	9/15/2023 at 4:24 pm	
Deposit	9/15/2023 at 1:34 pm	
Deposit	9/17/2023 at 12:32 pm	
Deposit	9/19/2023 at 12:02 pm	
Deposit	9/20/2023 at 12:00 pm	

A callout box over the table reads: "Click on a deposit to view deposit details such as transactions within the deposit, fees collected, and print or export the deposit details if needed."

The detailed view for a \$274.65 deposit is shown in a modal window. It includes options to 'Export deposit detail' and 'Print deposit detail'. The details section lists: 09/06/23 at 4:36 pm, Bank account ending in 3577, Deposit initiated 09/06/23, Total transactions \$274.65, and Total processing fees: -\$7.00.

Below the details are two tables:

3 Transactions (Show toggle on)

Time	Brand	Card	Type	Amount	Rate	Fees	Total
09/06/2023 12:52 pm	Visa	8696	EMV	\$52.50	2.65%	\$1.00	\$54.91
09/06/2023 1:26 pm	Amex	8696	Swiped	\$85.90	1.34%	\$2.00	\$89.05
09/06/2023 2:01 pm	MC	8696	Keyed	\$125.35	1.07%	\$4.00	\$130.69

3 Fees (Show toggle on)

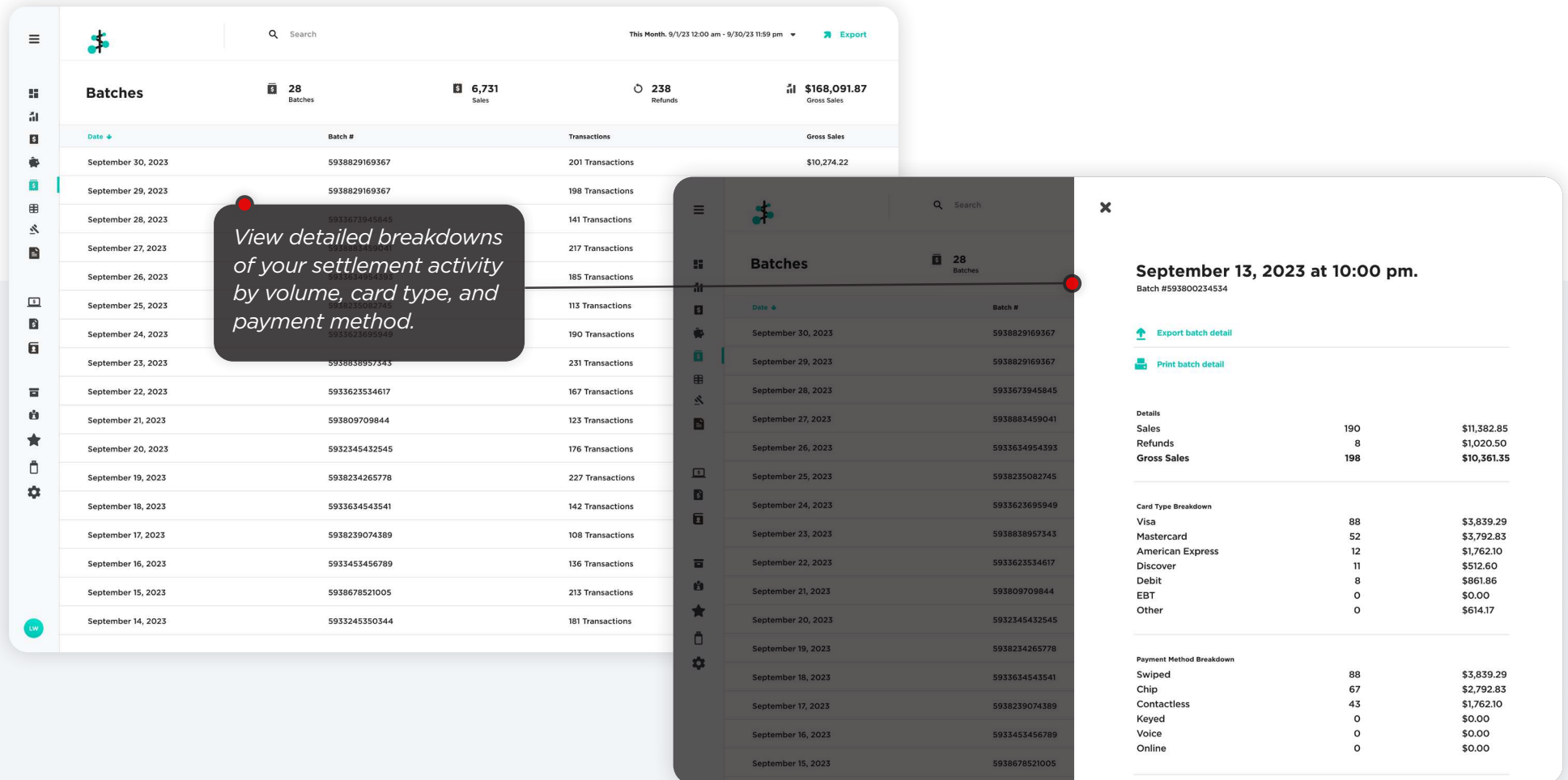
Date	Description	Amount
09/06/2023 at 12:52 pm	Visa interchange	-\$1.00
09/06/2023 at 1:26 pm	Amex interchange	-\$2.00
09/06/2023 at 2:01 pm	MC interchange	-\$4.00

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

Activity.

Batches.

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



The screenshot displays a software interface for managing batches. The main view shows a table of batches with columns for Date, Batch #, Transactions, and Gross Sales. A callout box highlights the detailed view of a batch, which includes a summary of sales, refunds, and gross sales, as well as breakdowns by card type and payment method.

View detailed breakdowns of your settlement activity by volume, card type, and payment method.

Date	Batch #	Transactions	Gross Sales
September 30, 2023	5938829169367	201 Transactions	\$10,274.22
September 29, 2023	5938829169367	198 Transactions	
September 28, 2023	5933673945845	141 Transactions	
September 27, 2023	5938883459041	217 Transactions	
September 26, 2023	5935634954393	185 Transactions	
September 25, 2023	5938235082745	113 Transactions	
September 24, 2023	5933623534617	190 Transactions	
September 23, 2023	5938838957343	231 Transactions	
September 22, 2023	5933623534617	167 Transactions	
September 21, 2023	593809709844	123 Transactions	
September 20, 2023	5932345432545	176 Transactions	
September 19, 2023	5938234265778	227 Transactions	
September 18, 2023	5933634543541	142 Transactions	
September 17, 2023	5938239074389	108 Transactions	
September 16, 2023	5933453456789	136 Transactions	
September 15, 2023	5938678521005	213 Transactions	
September 14, 2023	5933245350344	181 Transactions	

September 13, 2023 at 10:00 pm.		
Batch #593800234534		
Export batch detail		
Print batch detail		
Details		
Sales	190	\$11,382.85
Refunds	8	\$1,020.50
Gross Sales	198	\$10,361.35
Card Type Breakdown		
Visa	88	\$3,839.29
Mastercard	52	\$3,792.83
American Express	12	\$1,762.10
Discover	11	\$512.60
Debit	8	\$861.86
EBT	0	\$0.00
Other	0	\$614.17
Payment Method Breakdown		
Swiped	88	\$3,839.29
Chip	67	\$2,792.83
Contactless	43	\$1,762.10
Keyed	0	\$0.00
Voice	0	\$0.00
Online	0	\$0.00

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

Activity.

Reports. 📊

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

If you have access to multiple accounts, click All Accounts to see reporting for all locations.

The screenshot shows a web application interface for reports. On the left is a sidebar with a hamburger menu, a logo, and a list of report categories: All Reports, Sales Reports, Customer Reports, Employee Reports, and Inventory Reports. Below these is a question: "What does Total Collected mean?". The main content area has a search bar "Search Reports" and a date range "This Month. 9/1/23 12:00 am - 9/30/23 11:59 pm" with a dropdown arrow. To the right of the date range is a link "All Accounts" with a checkmark icon. Below this is a list of reports, each with a title and a brief description. The "Batch Summary" report is highlighted in light blue and has an "Export" button to its right. The reports listed are: Account Summary (breakdown of gross and net sales), Batch Detail (sum of credit card transactions), Batch Summary (overview of batches), Card Brand Summary (sales totals by card brand), Customer Export (listing of customers), Customer Experience (summary of feedback), Customer Performance (top customers and spending habits), Deposit Detail (transactions and fees), Deposit Summary (overview of deposits), Disputes Report (status of disputes), and Employee Flash Report (totals for net sales, discounts, etc. by employee).

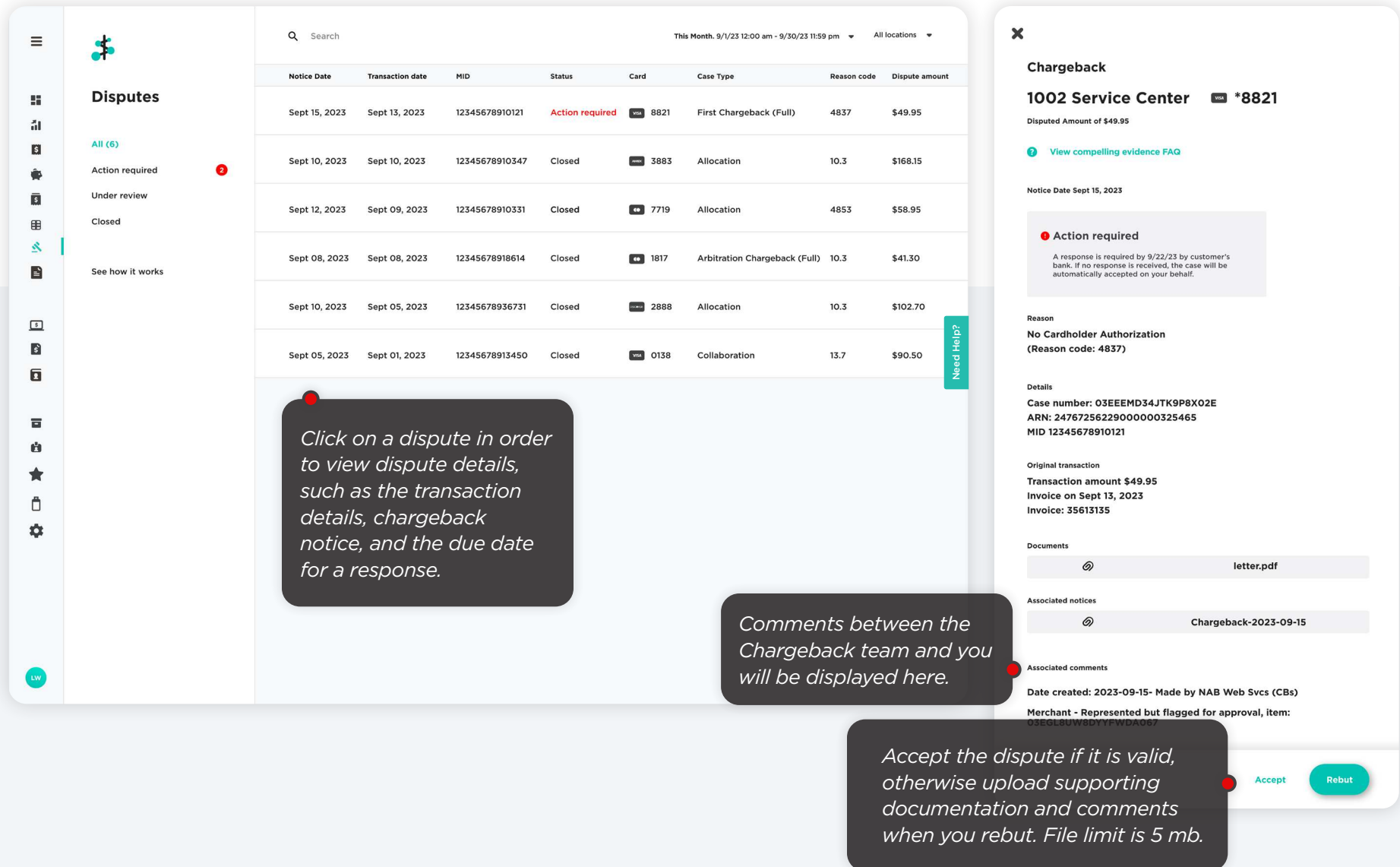
- Commonly used reports:**
- ✓ Account Summary
 - ✓ Flash
 - ✓ Expanded Transactions
 - ✓ Batch
 - ✓ Deposit Detail

Depending on your account type and pricing you may see different reports available to you.

Activity.


Disputes.

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



The interface displays a list of disputes with columns for Notice Date, Transaction date, MID, Status, Card, Case Type, Reason code, and Dispute amount. A detailed view of a chargeback is shown on the right, including the merchant name (1002 Service Center), card number (*8821), and a list of documents and notices.

Notice Date	Transaction date	MID	Status	Card	Case Type	Reason code	Dispute amount
Sept 15, 2023	Sept 13, 2023	12345678910121	Action required	Visa 8821	First Chargeback (Full)	4837	\$49.95
Sept 10, 2023	Sept 10, 2023	12345678910347	Closed	Master 3883	Allocation	10.3	\$168.15
Sept 12, 2023	Sept 09, 2023	12345678910331	Closed	Master 7719	Allocation	4853	\$58.95
Sept 08, 2023	Sept 08, 2023	12345678918614	Closed	Master 1817	Arbitration Chargeback (Full)	10.3	\$41.30
Sept 10, 2023	Sept 05, 2023	12345678936731	Closed	Master 2888	Allocation	10.3	\$102.70
Sept 05, 2023	Sept 01, 2023	12345678913450	Closed	Visa 0138	Collaboration	13.7	\$90.50

Chargeback
1002 Service Center  *8821
Disputed Amount of \$49.95
[View compelling evidence FAQ](#)


Notice Date Sept 15, 2023


Action required
A response is required by 9/22/23 by customer's bank. If no response is received, the case will be automatically accepted on your behalf.

Reason
No Cardholder Authorization
(Reason code: 4837)

Details
Case number: 03EEEMD34JTK9P8X02E
ARN: 24767256229000000325465
MID 12345678910121

Original transaction
Transaction amount \$49.95
Invoice on Sept 13, 2023
Invoice: 35613135

Documents
 letter.pdf

Associated notices
 Chargeback-2023-09-15

Associated comments
Date created: 2023-09-15- Made by NAB Web Svcs (CBs)
Merchant - Represented but flagged for approval, item: 03EGLBUW8DYFWDA067

[Accept](#) [Rebut](#)

Click on a dispute in order to view dispute details, such as the transaction details, chargeback notice, and the due date for a response.

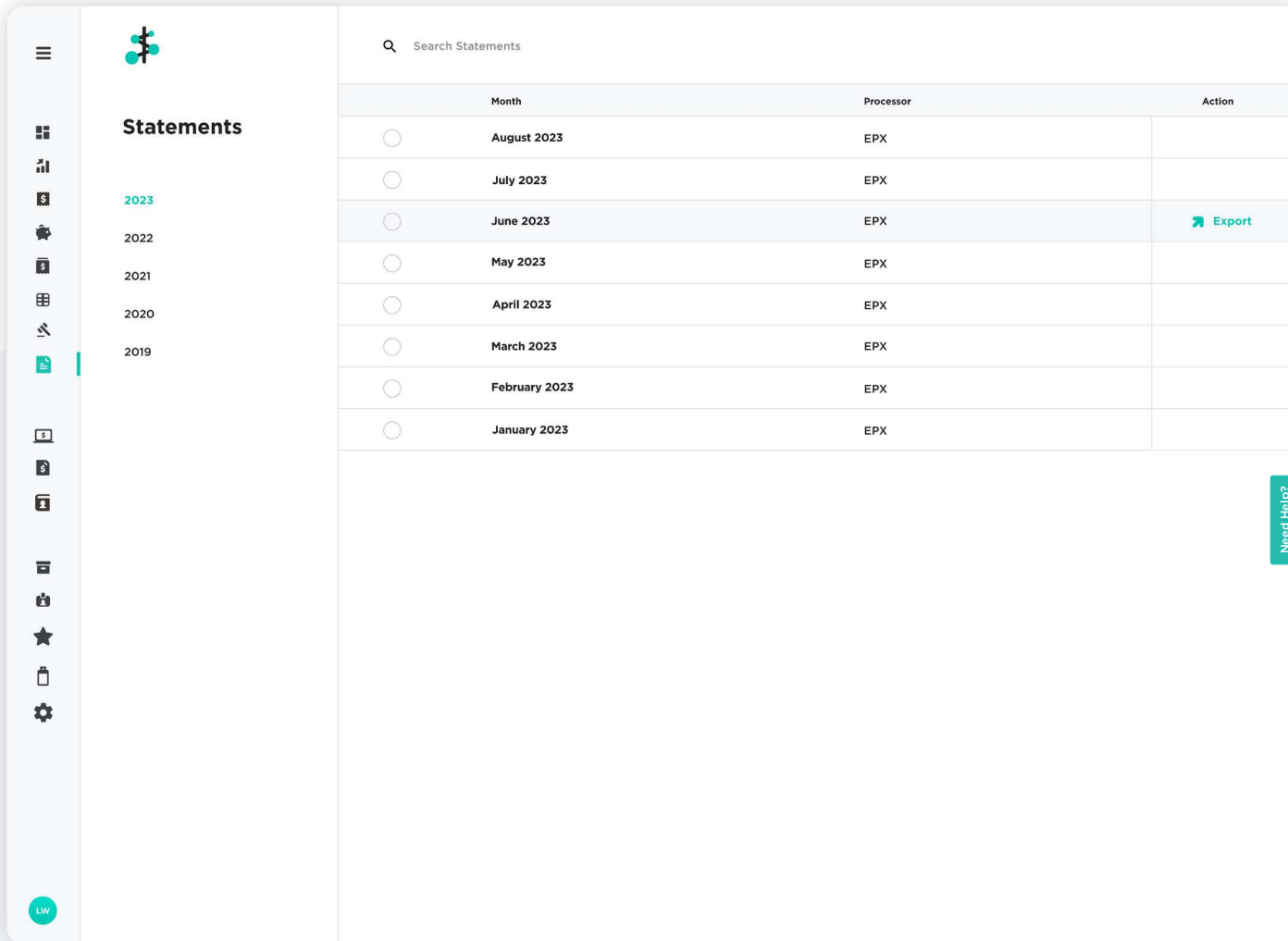
Comments between the Chargeback team and you will be displayed here.

Accept the dispute if it is valid, otherwise upload supporting documentation and comments when you rebut. File limit is 5 mb.

Activity.

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.



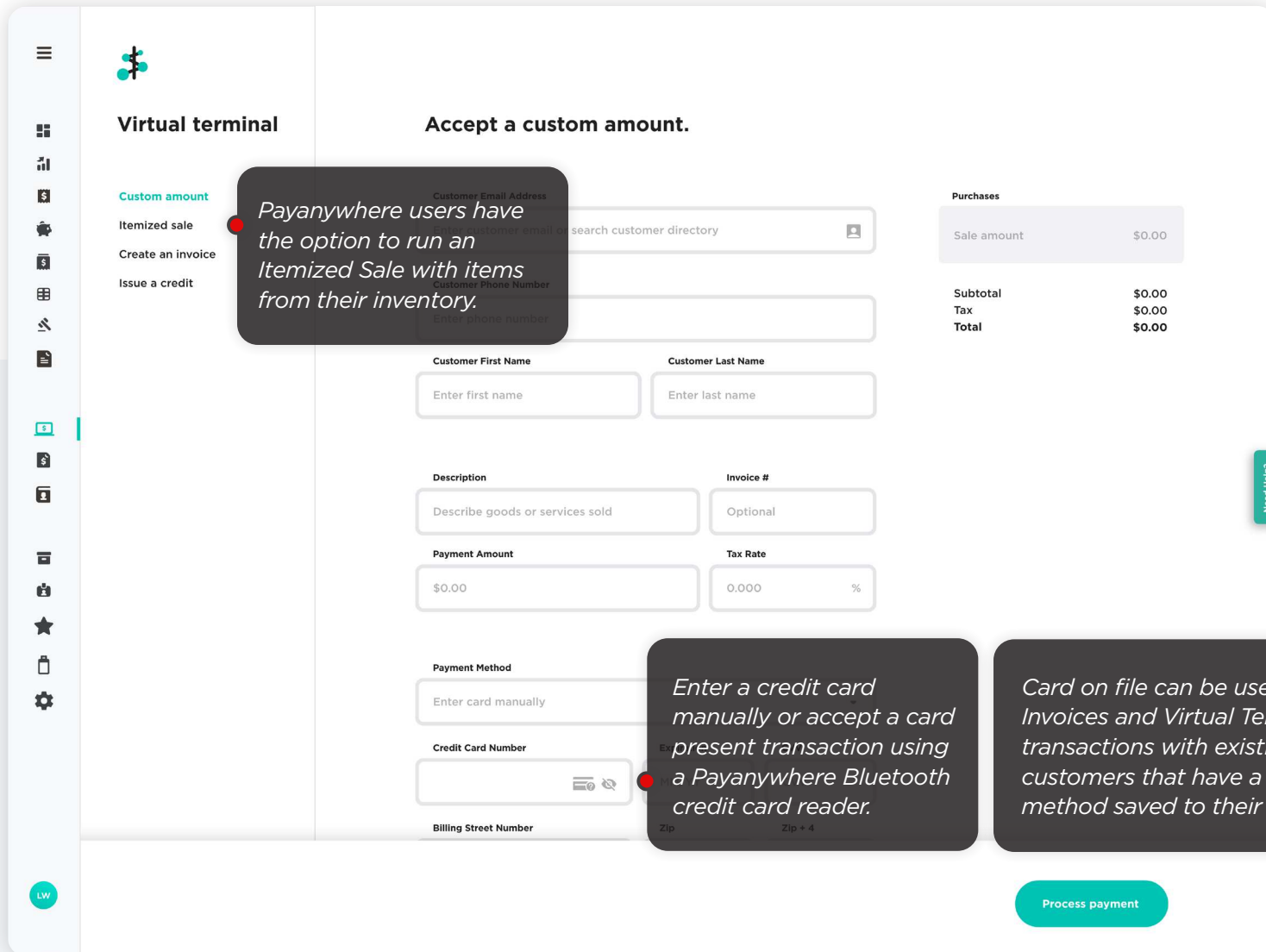
The screenshot shows a web interface for viewing statements. On the left is a sidebar with navigation icons and a user profile 'LW'. The main content area has a search bar 'Search Statements' and a table of statements for the year 2023. The table has columns for 'Month', 'Processor', and 'Action'. The 'June 2023' row is highlighted and has an 'Export' button. A 'Need Help?' button is located at the bottom right of the table area.

Month	Processor	Action
<input type="radio"/> August 2023	EPX	
<input type="radio"/> July 2023	EPX	
<input checked="" type="radio"/> June 2023	EPX	Export
<input type="radio"/> May 2023	EPX	
<input type="radio"/> April 2023	EPX	
<input type="radio"/> March 2023	EPX	
<input type="radio"/> February 2023	EPX	
<input type="radio"/> January 2023	EPX	

Payments.

Virtual Terminal.

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



Virtual terminal **Accept a custom amount.**

Custom amount

- Itemized sale
- Create an invoice
- Issue a credit

Payanywhere users have the option to run an Itemized Sale with items from their inventory.

Customer Email Address
search customer directory

Customer First Name
Enter first name

Customer Last Name
Enter last name

Description
Describe goods or services sold

Invoice #
Optional

Payment Amount
\$0.00

Tax Rate
0.000 %

Payment Method
Enter card manually

Credit Card Number
Ex

Billing Street Number
Zip Zip + 4

Purchases

Sale amount	\$0.00
Subtotal	\$0.00
Tax	\$0.00
Total	\$0.00

Need Help?

Process payment

Enter a credit card manually or accept a card present transaction using a Payanywhere Bluetooth credit card reader.

Card on file can be used for Invoices and Virtual Terminal transactions with existing customers that have a payment method saved to their profile.

Payments.

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.

1

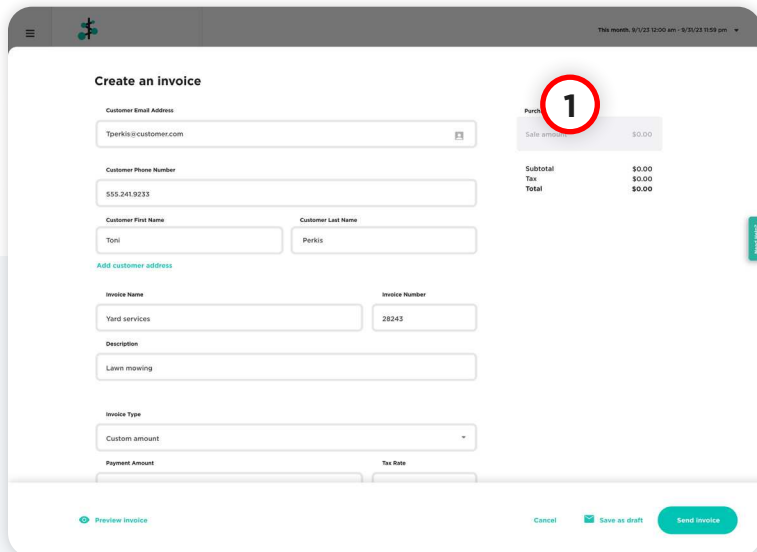
Create invoice.

2

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

3

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



Create an invoice

Customer Email Address:

Customer Phone Number:

Customer First Name: Customer Last Name:

Add customer address

Invoice Name: Invoice Number:

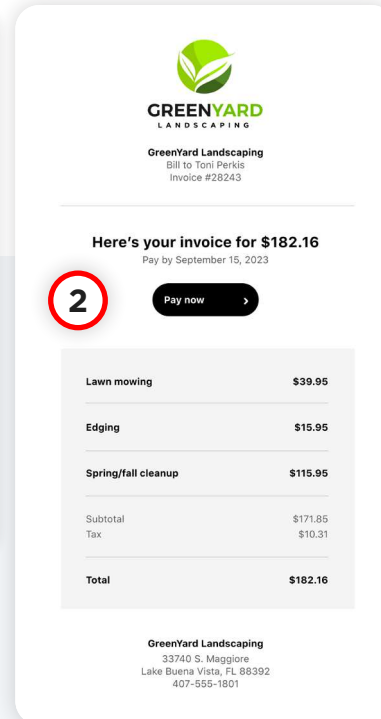
Description:

Invoice Type:

Payment Amount: Tax Rate:

[Preview invoice](#) [Cancel](#) [Save as draft](#) [Send invoice](#)

Price	\$0.00
Sale amount	\$0.00
Subtotal	\$0.00
Tax	\$0.00
Total	\$0.00



GREENYARD LANDSCAPING

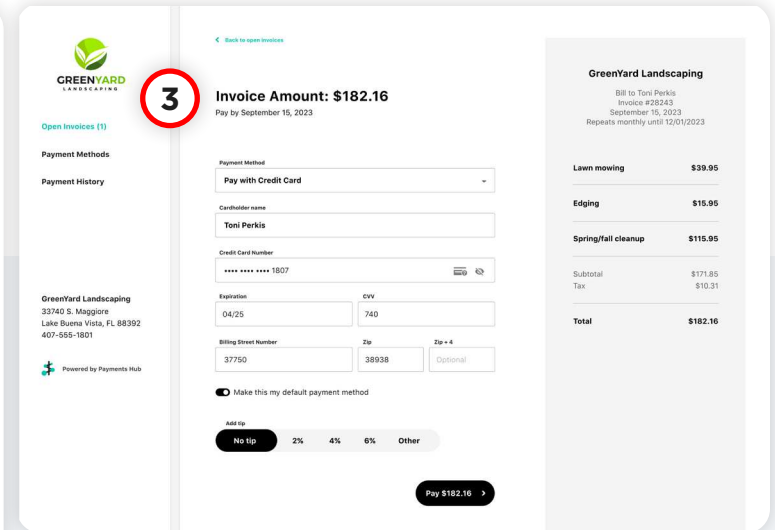
GreenYard Landscaping
Bill to Toni Perkis
Invoice #28243

Here's your invoice for \$182.16
Pay by September 15, 2023

[Pay now](#)

Lawn mowing	\$39.95
Edging	\$15.95
Spring/fall cleanup	\$115.95
Subtotal	\$171.85
Tax	\$10.31
Total	\$182.16

GreenYard Landscaping
33740 S. Magglore
Lake Buena Vista, FL 88392
407-555-1801



GREENYARD LANDSCAPING

Open Invoices (1)

Payment Methods

Payment History

GreenYard Landscaping
33740 S. Magglore
Lake Buena Vista, FL 88392
407-555-1801

Powered by Payments Hub

3 Invoice Amount: \$182.16
Pay by September 15, 2023

Payment Method:

Cardholder name:

Credit Card Number:

Expiration:

Billing Street Number: Zip: Zip + 4:

Make this my default payment method

Add tip: No tip 2% 4% 6% Other

[Pay \\$182.16](#)

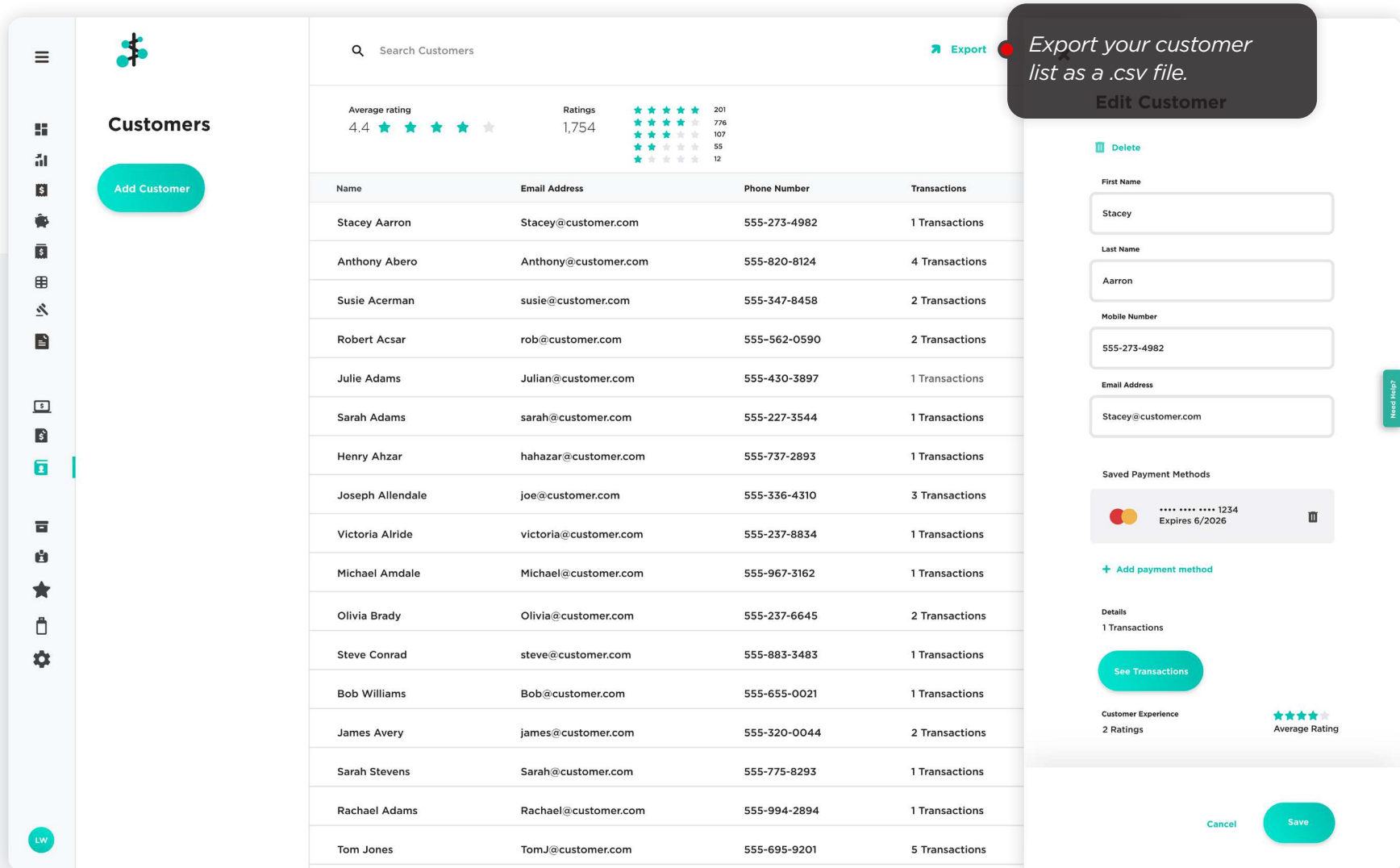
Lawn mowing	\$39.95
Edging	\$15.95
Spring/fall cleanup	\$115.95
Subtotal	\$171.85
Tax	\$10.31
Total	\$182.16

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.

Payments.



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

Search Customers Export

Average rating 4.4  Ratings 1,754 

Name	Email Address	Phone Number	Transactions
Stacey Aaron	Stacey@customer.com	555-273-4982	1 Transactions
Anthony Abero	Anthony@customer.com	555-820-8124	4 Transactions
Susie Acerman	susie@customer.com	555-347-8458	2 Transactions
Robert Acsar	rob@customer.com	555-562-0590	2 Transactions
Julie Adams	Julian@customer.com	555-430-3897	1 Transactions
Sarah Adams	sarah@customer.com	555-227-3544	1 Transactions
Henry Ahzar	hahazar@customer.com	555-737-2893	1 Transactions
Joseph Allendale	joe@customer.com	555-336-4310	3 Transactions
Victoria Alride	victoria@customer.com	555-237-8834	1 Transactions
Michael Amdale	Michael@customer.com	555-967-3162	1 Transactions
Olivia Brady	Olivia@customer.com	555-237-6645	2 Transactions
Steve Conrad	steve@customer.com	555-883-3483	1 Transactions
Bob Williams	Bob@customer.com	555-655-0021	1 Transactions
James Avery	james@customer.com	555-320-0044	2 Transactions
Sarah Stevens	Sarah@customer.com	555-775-8293	1 Transactions
Rachael Adams	Rachael@customer.com	555-994-2894	1 Transactions
Tom Jones	TomJ@customer.com	555-695-9201	5 Transactions

Edit Customer

Delete


First Name
Stacey

Last Name
Aaron

Mobile Number
555-273-4982

Email Address
Stacey@customer.com


Saved Payment Methods

 **** * 1234 Expires 6/2026

+ Add payment method

Details
1 Transactions

See Transactions

Customer Experience
2 Ratings  Average Rating

Cancel Save

Export your customer list as a .csv file.

Need Help?

The Customers section is only available for Payanywhere users.

Business Management.

Inventory.

Build a product library with items, categories, modifiers, and discounts.

To archive your inventory, select the items you wish to archive, or select all. You have the option to permanently delete items when viewing them under the Archived items filter.

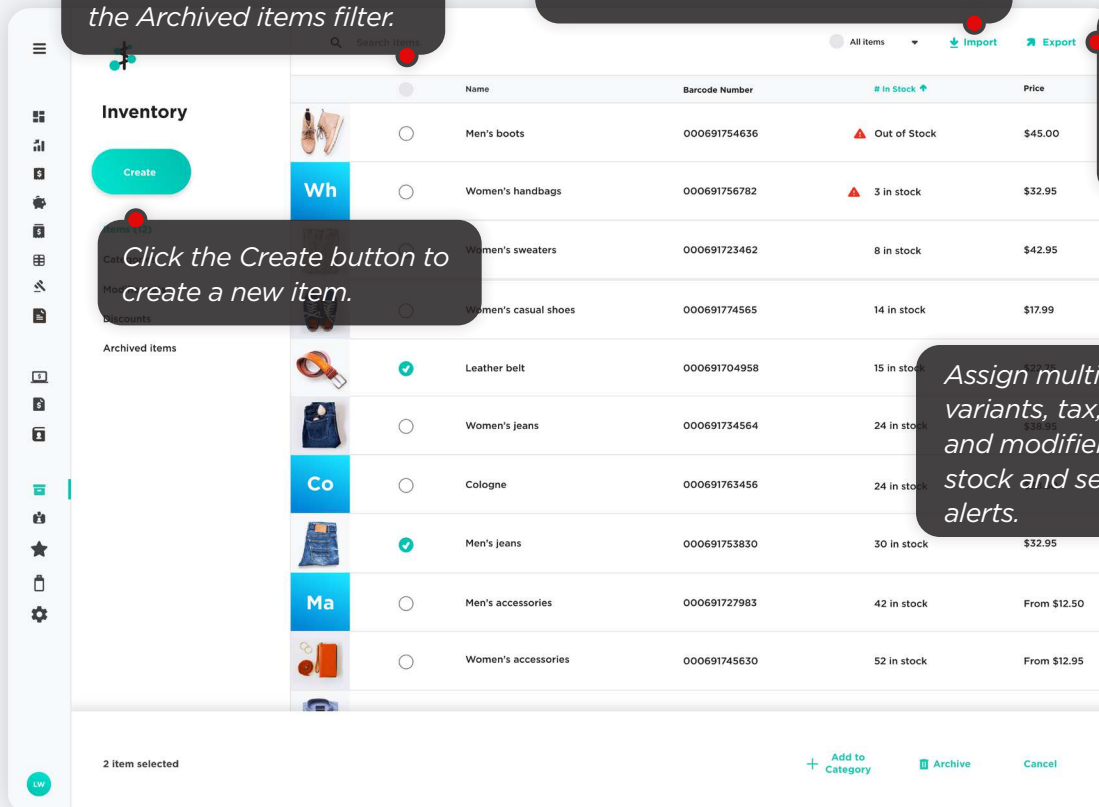
Bulk upload existing inventory using our custom .csv template. Be sure to create and/or assign a category to each item.

Skipping this step may cause an error during item import. Assign modifiers to items after you've imported.

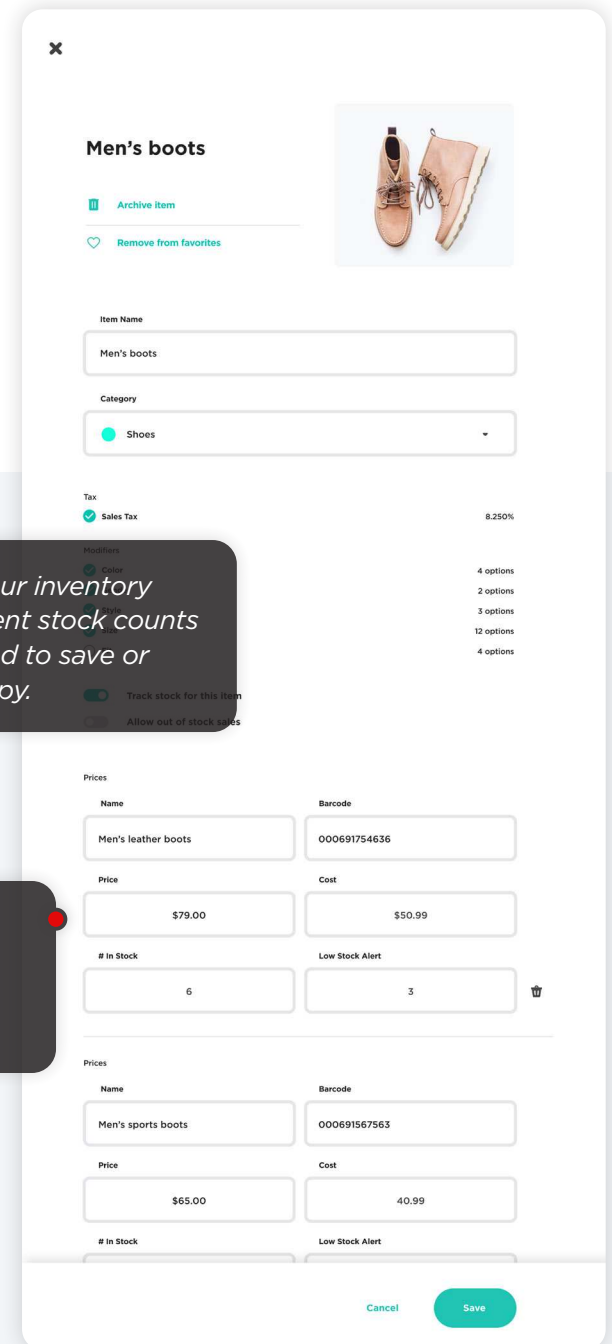
Export your inventory with current stock counts if you need to save or print a copy.

Click the Create button to create a new item.

Assign multiple price variants, tax, category, and modifier sets. Add stock and set low stock alerts.



	Name	Barcode Number	# In Stock	Price
	Men's boots	000691754636	Out of Stock	\$45.00
	Women's handbags	000691756782	3 in stock	\$32.95
	Women's sweaters	000691723462	8 in stock	\$42.95
	Women's casual shoes	000691774565	14 in stock	\$17.99
Archived items	Leather belt	000691704958	15 in stock	
	Women's jeans	000691734564	24 in stock	
	Cologne	000691763456	24 in stock	
	Men's jeans	000691753830	30 in stock	\$32.95
	Men's accessories	000691727983	42 in stock	From \$12.50
	Women's accessories	000691745630	52 in stock	From \$12.95



Men's boots

Archive Item

Remove from favorites

Item Name: Men's boots

Category: Shoes

Tax: Sales Tax 8.250%

Modifiers: Color (4 options), Track stock for this item (2 options), Allow out of stock sales (3 options)

Prices:

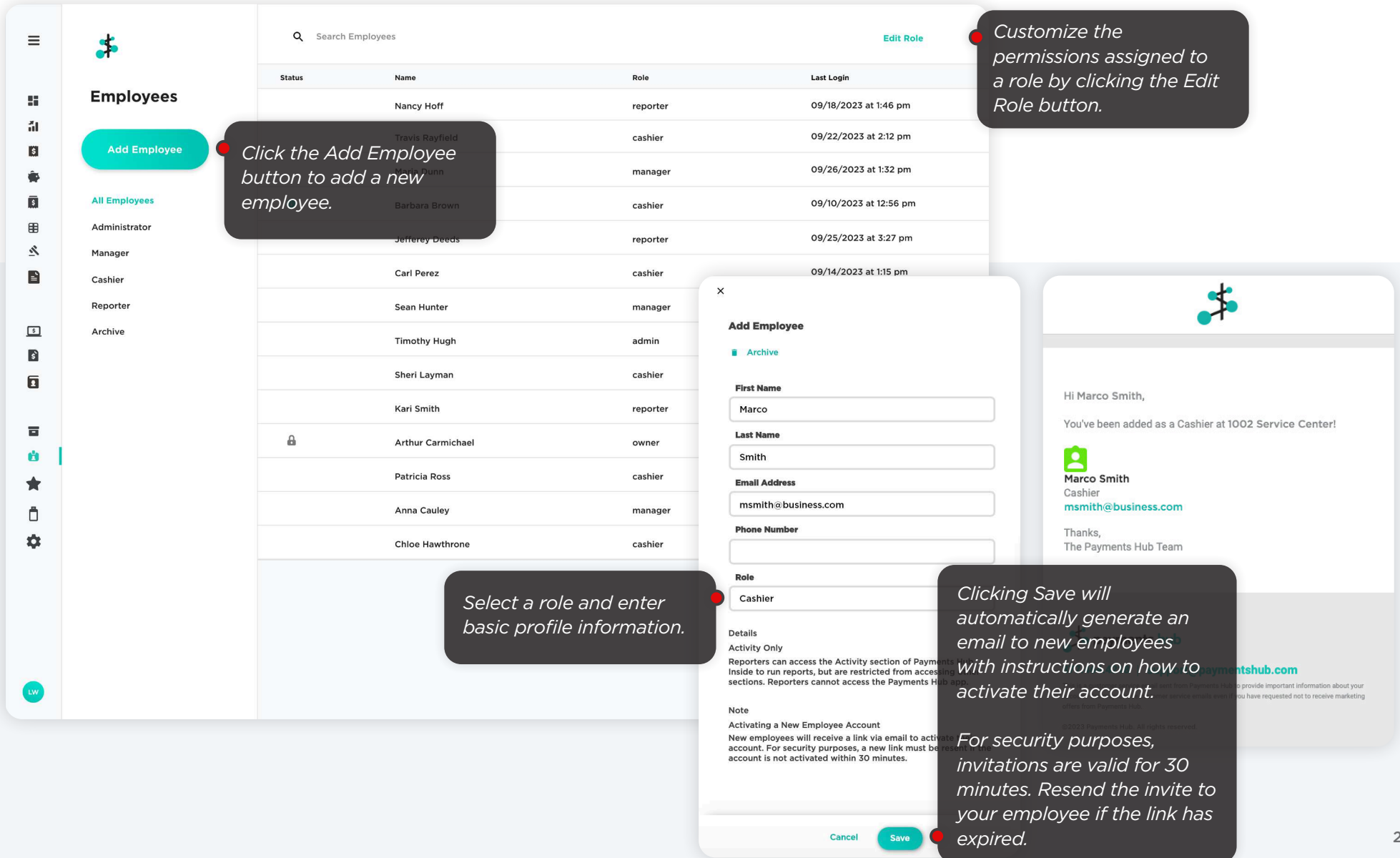
Name	Barcode	Price	Cost	# In Stock	Low Stock Alert
Men's leather boots	000691754636	\$79.00	\$50.99	6	3
Men's sports boots	000691567563	\$65.00	40.99		

Cancel Save

Business Management.

Employees.

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



The screenshot shows the 'Employees' management page. On the left is a sidebar with navigation icons and a list of roles: All Employees, Administrator, Manager, Cashier, Reporter, and Archive. The main area features a search bar and a table of employees. A callout points to the 'Add Employee' button. Another callout points to the 'Edit Role' button. A third callout points to the 'Save' button in the 'Add Employee' form. A fourth callout points to the email notification sent to the new employee.

















Status	Name	Role	Last Login
	Nancy Hoff	reporter	09/18/2023 at 1:46 pm
	Travis Rayfield	cashier	09/22/2023 at 2:12 pm
	Maria Dunn	manager	09/26/2023 at 1:32 pm
	Barbara Brown	cashier	09/10/2023 at 12:56 pm
	Jererey Deeds	reporter	09/25/2023 at 3:27 pm
	Carl Perez	cashier	09/14/2023 at 1:15 pm
	Sean Hunter	manager	
	Timothy Hugh	admin	
	Sheri Layman	cashier	
	Kari Smith	reporter	
🔒	Arthur Carmichael	owner	
	Patricia Ross	cashier	
	Anna Cauley	manager	
	Chloe Hawthorne	cashier	

Callouts:

- Add Employee:** Click the Add Employee button to add a new employee.
- Edit Role:** Customize the permissions assigned to a role by clicking the Edit Role button.
- Form:** Select a role and enter basic profile information.
- Notification:** Clicking Save will automatically generate an email to new employees with instructions on how to activate their account. For security purposes, invitations are valid for 30 minutes. Resend the invite to your employee if the link has expired.

Business Management.

Employees Roles.

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

Business Management.

Reputation Management. ★

Manage customer satisfaction, monitor the competition, and build a stronger online reputation. View the [Reputation Management Guide](#) for more information.

The screenshot shows a 'Reputation' sidebar with options for Trends, Customer Reviews, Competitor Performance, and Settings. The main area is titled 'Connect account' and prompts the user to sign in to their Google account. A 'Google Reviews' card shows a 'Connected' status for 'Paullie's Punch Out'.

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

The 'Notifications' page allows users to manage email alerts. It includes a section for 'Send alerts to' with two email addresses listed: owner@gmail.com and manager@gmail.com. A '+ Modify email recipients' link is also present.

Enable email notifications to receive a daily summary of new review activity.

The dashboard provides a comprehensive overview of reputation metrics. It includes: 'Overall Satisfaction Score' (5 stars, average from 793 reviews); 'Positive vs. Negative Reviews' (744 positive, 38 neutral, 11 negative, 94% positive); 'Reputation Change' (22% trending upward); 'Most Recent' reviews from 'Wright Hook', 'Knockout Nina', and 'Mysterious Stranger'; 'Competitor Performance' for 'Karl's Kickboxing' and 'Jim's Gym'; and 'Most Common Words' like 'friendly', 'boxing', 'instructor', 'clean', 'service', 'class', 'workout', and 'sparring'.

Gain insights on your rating and review trends by week, month, and year.

Add competitors to keep tabs on their reputation and see how you compare.

The interface shows a 'Positive Pete' review from March 16, 2023, with a 5-star rating. A response is being drafted: 'Thanks for the feedback. Visit us again soon!'. The interface includes a 'Respond to Pete' section with a 'Clear' button and a 'Send' button at the bottom.

Create custom default quick replies for each review category.

Business Management.

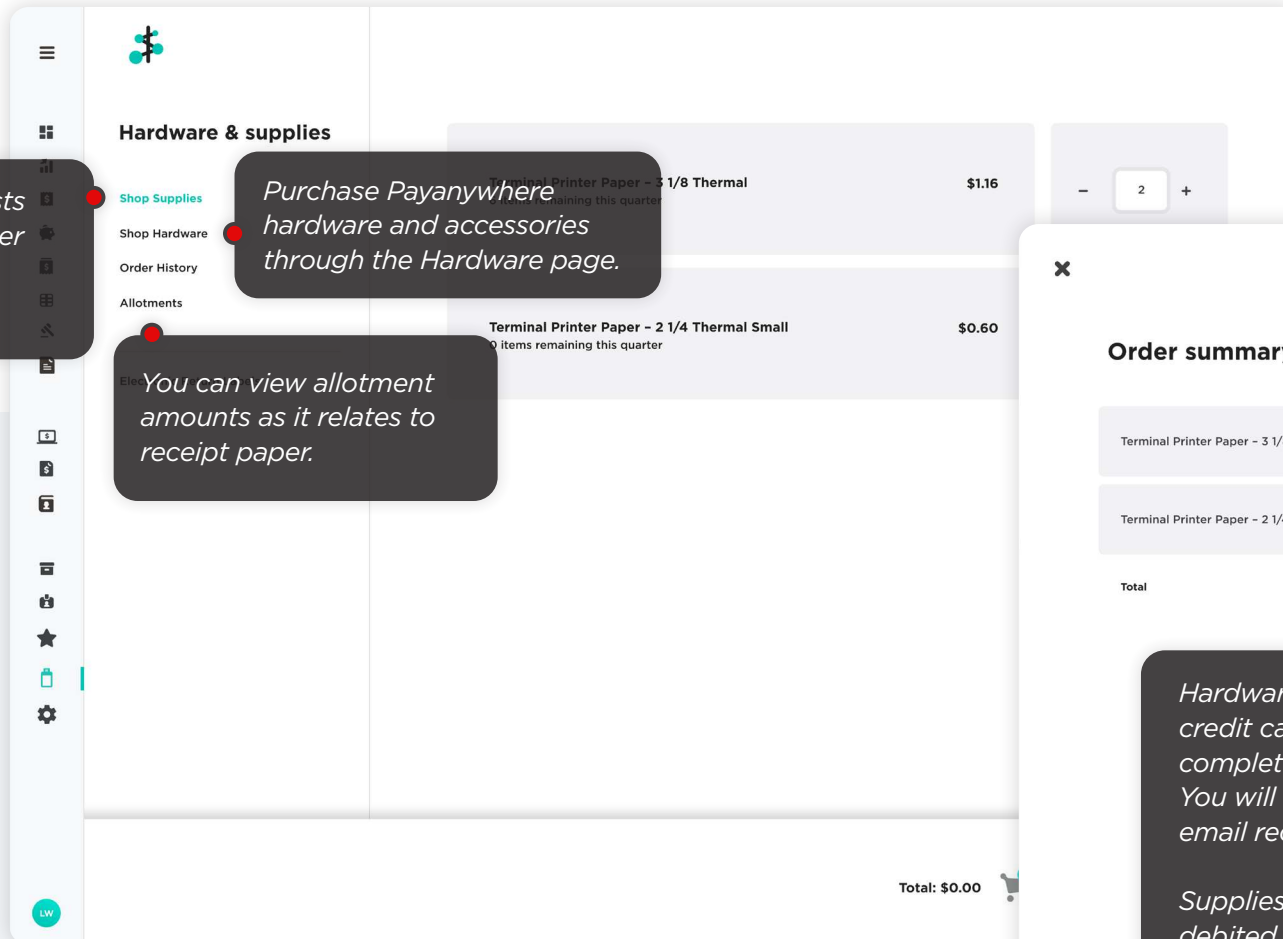
Hardware & Supplies.

Order additional hardware, accessories, and supplies.

The Supplies page lists available receipt paper depending on your equipment.

Purchase Payanywhere hardware and accessories through the Hardware page.

You can view allotment amounts as it relates to receipt paper.





The screenshot shows the 'Hardware & supplies' page with a sidebar menu containing 'Shop Supplies', 'Shop Hardware', 'Order History', and 'Allotments'. The main content area displays a list of items:

Item	Price
Terminal Printer Paper - 3 1/8 Thermal	\$1.16
Terminal Printer Paper - 2 1/4 Thermal Small	\$0.60

At the bottom right of the page, there is a 'Total: \$0.00' and a shopping cart icon.

Order summary.

[Clear cart](#)

Terminal Printer Paper - 3 1/8 Thermal (2)	\$0.00	
Terminal Printer Paper - 2 1/4 Thermal Small (2)	\$1.20	
Total	\$1.20	

Hardware - Enter your credit card info to complete your order. You will receive an email receipt.

Supplies - You will be debited through ACH if there is an amount due for your order.

[Cancel](#)

[Checkout: \\$1.20](#)

Business Management.

Business Settings.

View and manage your Business Settings.

- Payanywhere merchants: Settings updated here will reflect in the Payanywhere app.*
- Set up your receipt, invoices, and payment portal with an image, brand color, custom message, and links to your social media profiles.*
- View and edit your business information. You will need to enter a unique security code sent to your mobile number via SMS in order to make any changes.*
- View and download helpful information regarding PCI Compliance.*
- See relevant tax information, including TIN mismatch status and download your 1099K.*
- Make changes to your funding settings and bank information.*
- Use basic and custom email alerts to keep an eye on your business activity.*
- Use third party services such as Homebase and QuickBooks Online.*
- View devices that are running the Payanywhere app.*

Business settings

- Payment settings
- Receipt & invoice settings**
- Business profile
- PCI Compliance
- 1099K & tax
- Funding
- Communication settings
- Integrations
- Devices


Receipt & invoice settings.

[Preview receipt](#) [Preview invoice](#) [Preview payment portal](#)


Business information

Customize business information displayed on customer receipts, invoices, and customer-facing web pages.

Logo

 ×

Business Name: GreenYard Landscaping

Brand Color:  ▾

Street Address: 33740 S. Maggiore

City: Lake Buena Vista

State: FL ▾

Zip Code: 88392

Business Number: 407-555-1801

[Save settings](#)

[Need help?](#)

LW

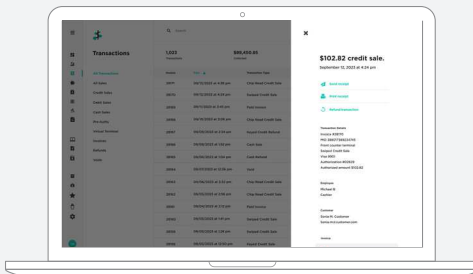
Using Payments Hub.



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>

A screenshot of the 'Reset password' form. It features the Payments Hub logo at the top, followed by the heading 'Reset password.' Below this is a text input field labeled 'Email Address'. At the bottom, there is a checkbox for 'I'm not a robot' and a 'Submit' button.

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.

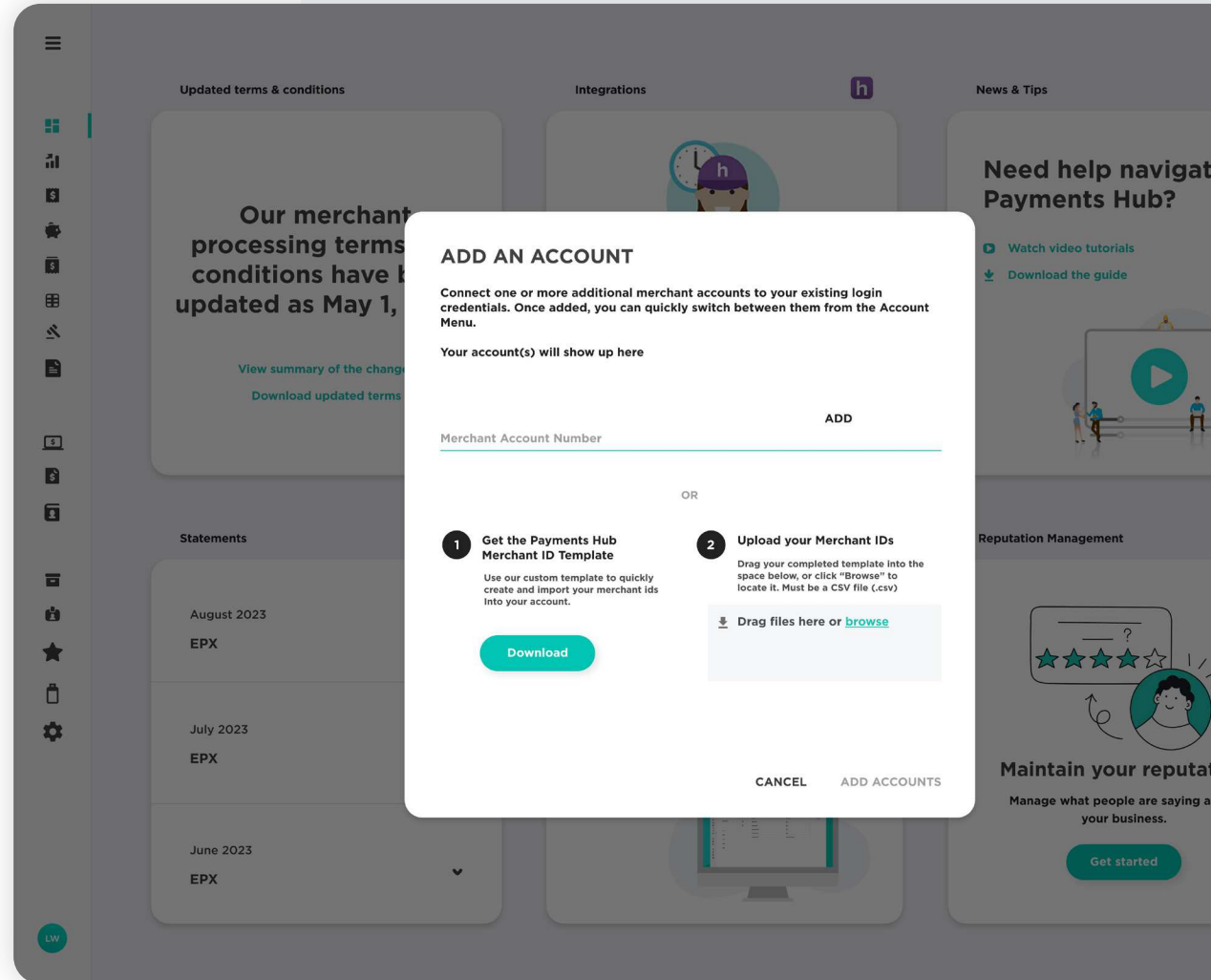
Adding MIDs to an account.

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.

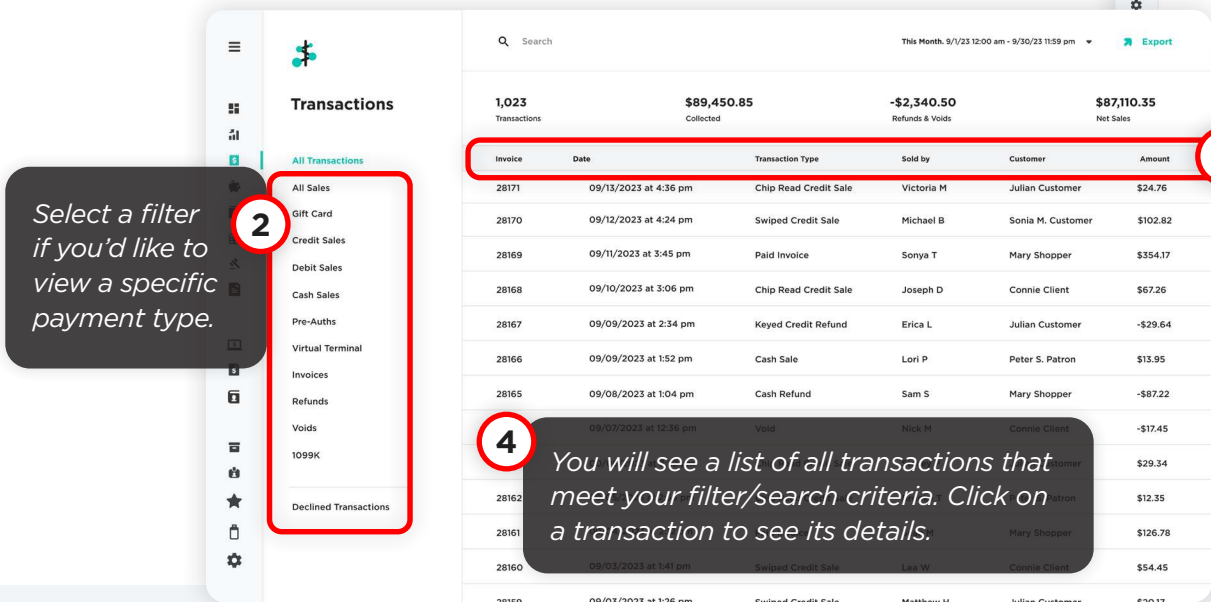
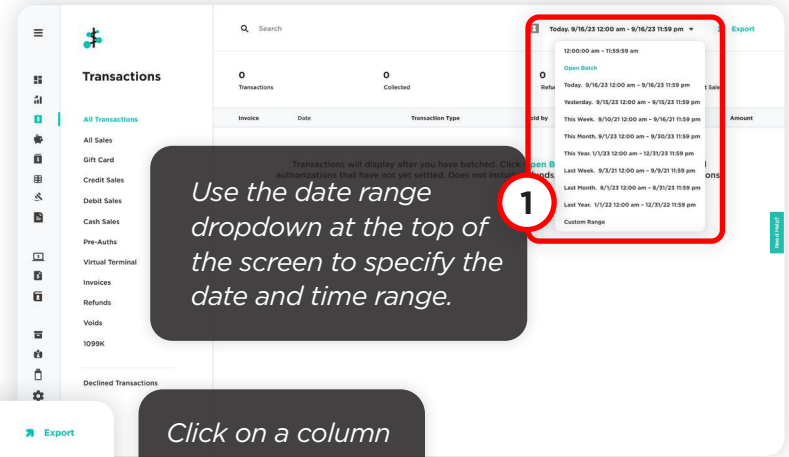
Note: This functionality is currently not available to Payanywhere merchants.



Viewing processing activity.

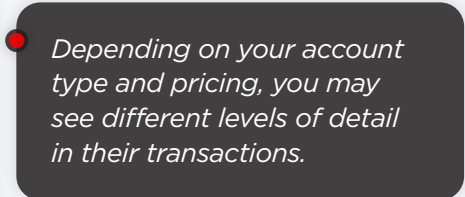
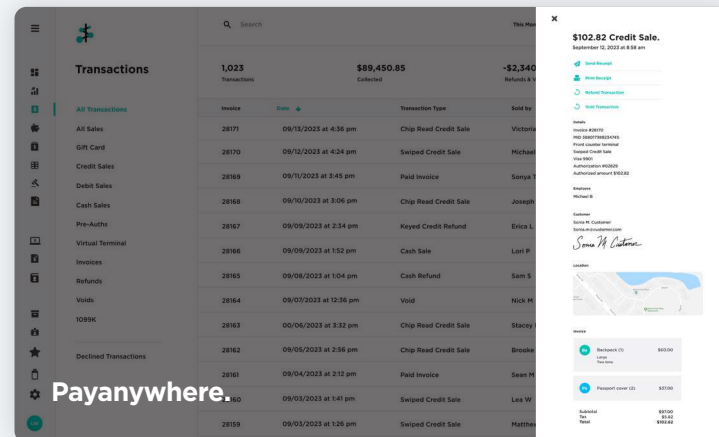
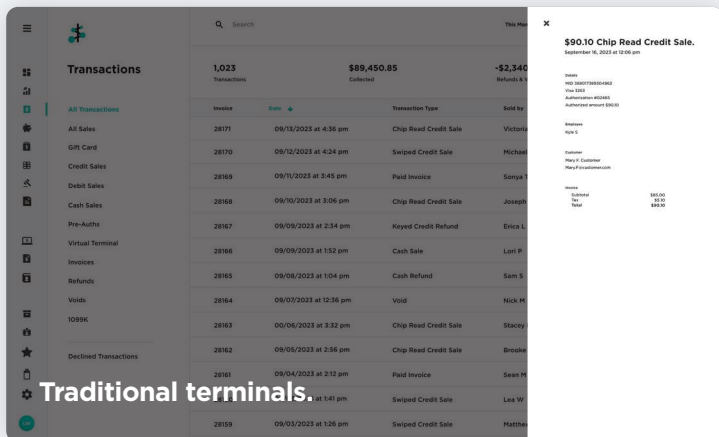
Transactions.

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.



Viewing processing activity.

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.

Search Deposits

This Month: 9/1/23 12:00 am - 9/30/23 11:59 pm

Export

\$1058.53
19 Deposits

\$180.71
3 Held funds

Type	Amount
Deposit	\$34.90
Deposit	\$65.20
Deposit	\$20.55
Deposit	\$274.65
Deposit	\$31.85
Deposit	\$80.45
Withdrawal	-\$25.00
Deposit	\$52.10
Withdrawal	-\$50.00
Deposit	\$38.95
Deposit	\$42.44
Withdrawal	-\$10.00
Withdrawal	-\$33.50
Deposit	\$78.93

Click the date range dropdown at the top of the screen to choose a date range for the deposits you would like to view.

Click on a deposit to view deposit details, such as transactions within the deposit, fees collected, and print or export the deposit details if needed.

Payanywhere.

Search Deposits

\$274.65 Deposit

\$1058.53
19 Deposits

\$20.56
3 Held funds

Type	Amount
Deposit	\$34.90
Deposit	\$65.20
Deposit	\$20.55
Deposit	\$274.65
Deposit	\$31.85
Deposit	\$80.45
Withdrawal	-\$25.00
Deposit	\$52.10
Withdrawal	-\$50.00
Deposit	\$38.95
Deposit	\$42.44
Withdrawal	-\$10.00
Withdrawal	-\$33.50
Deposit	\$78.93

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

Viewing processing activity.

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 detail in their batches.

If you do not see the Batches page, you may not be using our in-house payment processor, EPX.

Payanywhere users will only see the Batches page if you are manually closing your transactions.

Click the date range dropdown at the top of the screen to choose a date and time range for the batches you would like to view.

Date	Batch #	Transactions	Gross Sales
September 30, 2023	593882969367	201 Transactions	\$10,274.22
September 29, 2023	5938829169367	198 Transactions	\$9,386.68
September 28, 2023	5933673945845	141 Transactions	\$7,746.90
September 27, 2023	5938883459041	217 Transactions	\$11,155.62
September 26, 2023	5933634954393		
September 25, 2023	5938235082745		
September 24, 2023	5933623695949		
September 23, 2023	5938838957343		
September 22, 2023	5933623534617		
September 21, 2023	593809709844		
September 20, 2023	5932345432545		
September 19, 2023	5938234265778		
September 18, 2023	5933634543541		
September 17, 2023	593823074389		
September 17, 2023	5933454456789		

Select a specific batch to view a breakdown of sales, refunds, card type, and payment methods, as well as a list of transactions within your batch.

Export or print your Batch Detail report for transaction information, such as date & time, invoice number, auth code, and card number.

September 19, 2023 at 10:00 pm.

Batch #5938234265778

[Export batch detail](#)
[Print batch detail](#)

Details		
Sales	190	\$11,688.95
Refunds	8	\$1,020.50
Gross Sales	198	\$10,668.45

Card Type Breakdown

Card Type		
Visa	88	\$3,839.29
Mastercard	52	\$3,792.83
American Express	12	\$1,762.10
Discover	11	\$512.60
Debit	8	\$961.86
EBT	0	\$0.00
Other	0	\$614.17

Payment Method Breakdown

Payment Method		
Swiped	88	\$3,839.29
Chip	67	\$2,792.83
Contactless	43	\$1,762.10
Keyed	0	\$0.00
Voice	0	\$0.00
Online	0	\$0.00

198 Transactions Show

Time	Brand	Card	Type	Proc	Total
7:33 pm	Amex	4465	Swiped	Sale	\$14.50
7:25 pm	Visa	6465	Keyed	Sale	\$98.35
7:17 pm	MC	1840	Swiped	Refund	\$47.49
7:07 pm	Amex	4008	Swiped	Sale	\$12.37
7:33 pm	Amex	4465	Swiped	Sale	\$14.50

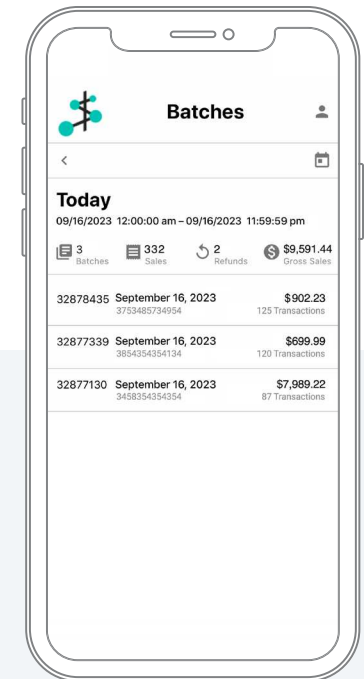
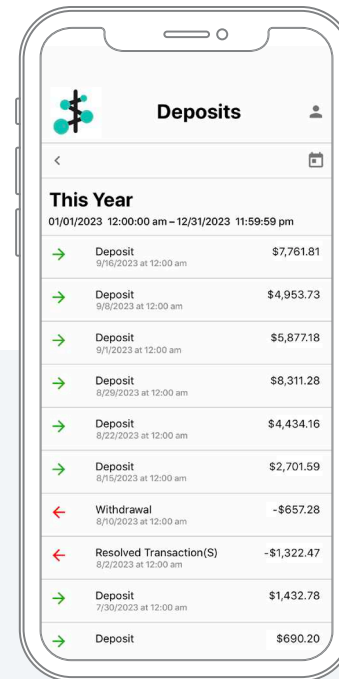
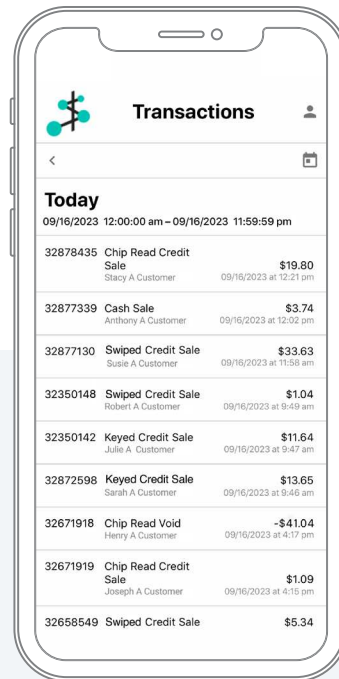
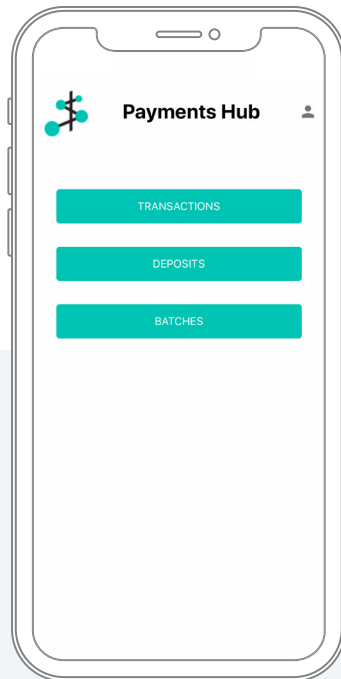
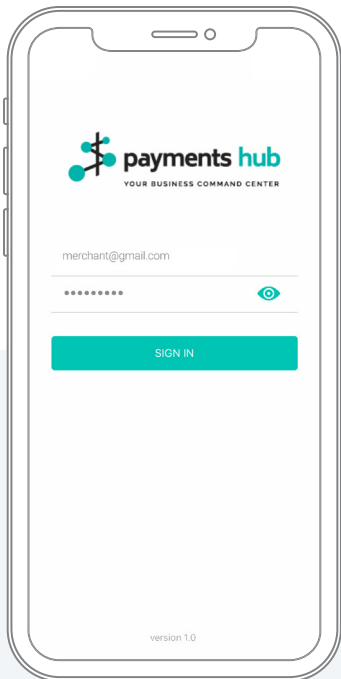
Viewing processing activity.

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.



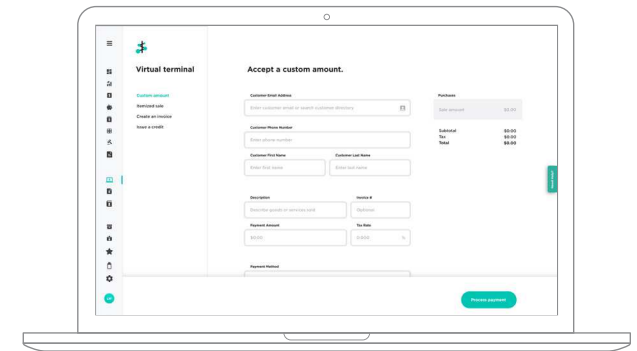
Accepting a payment.

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 → Manager → Edit Role.

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



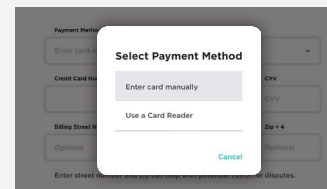
To accept a payment using the Virtual Terminal:

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.

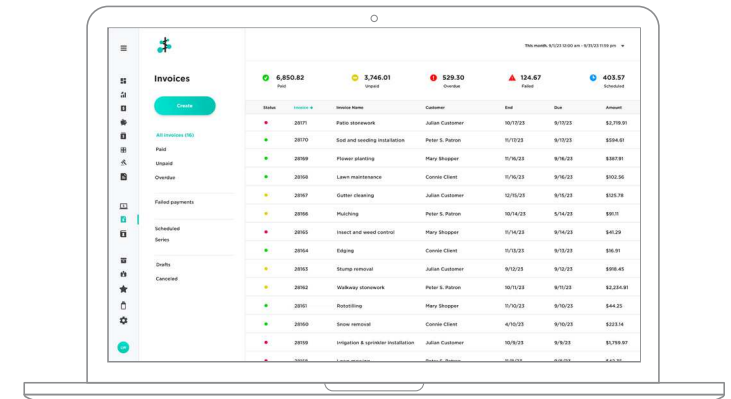
- Payanywhere 2-in-1 or 3-in-1 Bluetooth Credit Card Reader.
- Download the Payanywhere app driver to your computer.
- A USB cord if you're connecting via USB. Mac users can connect via Bluetooth if needed.
- We recommend using Chrome.

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 → Manager → 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.



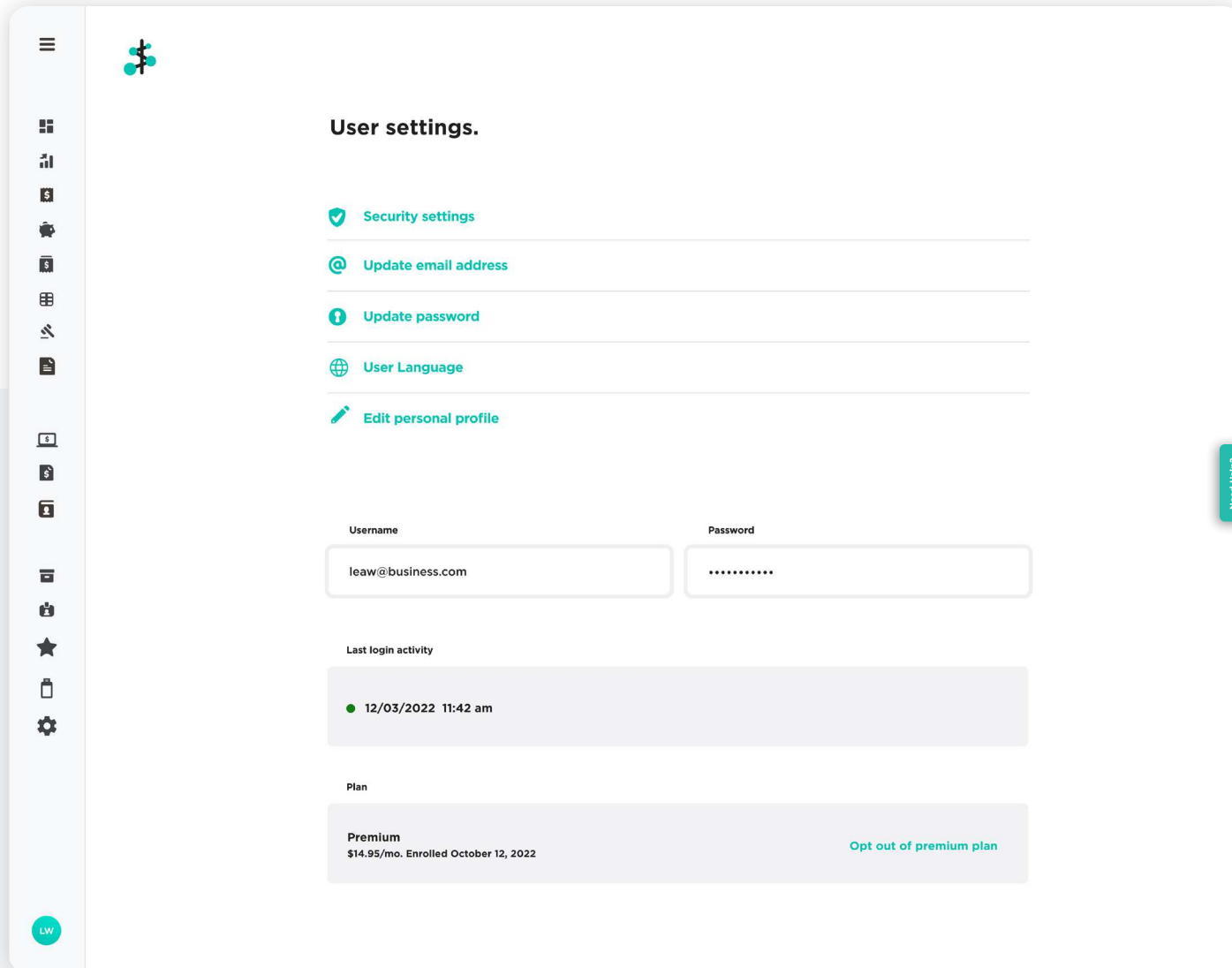
To cancel an invoice:

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.



The screenshot shows the 'User settings' page. On the left is a vertical sidebar with various icons. The main content area is titled 'User settings.' and contains several sections:

- Security settings** (checked): Includes links for 'Update email address', 'Update password', and 'User Language'.
- Edit personal profile**: A link with a pencil icon.
- Username**: A text input field containing 'leaw@business.com'.
- Password**: A password input field with masked characters '*****'.
- Last login activity**: A list showing a single entry: '12/03/2022 11:42 am' with a green dot.
- Plan**: A section showing 'Premium' at '\$14.95/mo. Enrolled October 12, 2022' and a link to 'Opt out of premium plan'.

A 'Need help?' button is located on the right side of the page. At the bottom left of the sidebar is a circular profile icon with the initials 'LW'.

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.

The screenshot shows a web application interface for business settings. On the left is a dark sidebar with a menu of icons and labels: Business settings, Payment settings, Receipt & invoice settings, Business profile (highlighted in teal), PCI Compliance, 1099K & tax, Funding, Communication settings, Integrations, and Devices. The main content area is titled "Business profile" and includes a warning: "You must verify your identity before editing your business profile." Below this is a teal "Edit business profile" button. A white modal window titled "Verify It's You" is centered on the screen. The modal contains the text: "Before making changes to your account, we'd like to verify your identity. We've sent a verification code to your mobile number ending 5813." It asks the user to "Enter in the code sent to your mobile number." and provides a text input field. Below the input field are two buttons: "Request new code" (teal text) and "Verify code" (teal button). To the left of the "Verify code" button is a "Cancel" link. In the background, partially obscured by the modal, are sections for "Actions Details" and "Corporate Address" with a dropdown arrow.

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>

The screenshot displays a help center interface with a teal header and a light gray background. On the left, a vertical sidebar contains various icons and a 'Need Help?' button highlighted with a red box. The main content area features three help cards:

- Card 1:** Titled "Need help navigating Payments Hub?" under the "News & Tips" category. It includes links for "Watch video tutorials" and "Download the guide", and a play button icon.
- Card 2:** Titled "Maintain your reputation" under the "Reputation Management" category. It features a star rating icon and a "Get started" button.
- Card 3:** Titled "Watch our statement video to understand your processing Statement better." under the "News & Tips" category. It includes a "Watch video" link and a computer monitor icon.

On the right, a "Help Center" sidebar is visible, containing a search bar and several help categories:

- What's New
- Help Videos
- Statements
- Chargebacks
- Premium Plan
- Order Supplies

Below these categories, there are sections for "Suggested articles" and "Getting Started", each with several blue hyperlinks.

payments**hub**