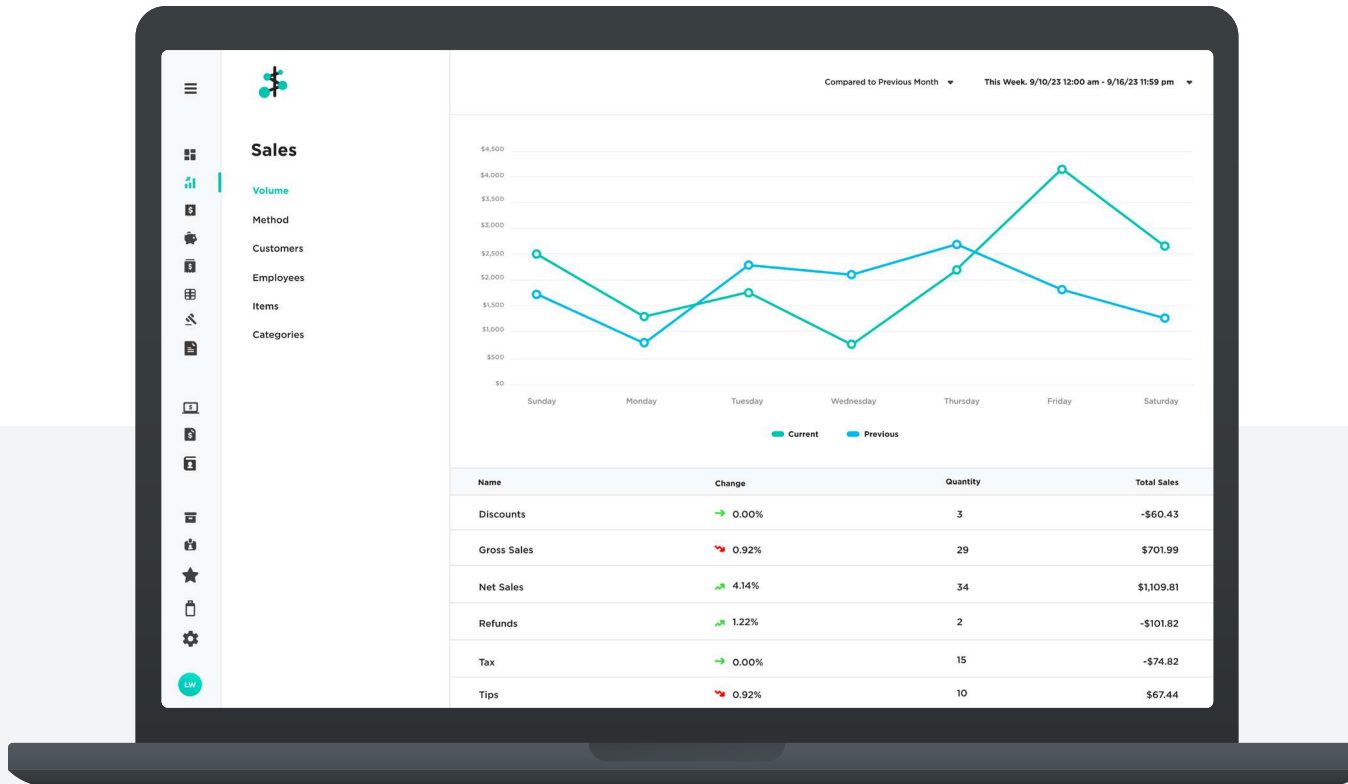# paymentshub

Your guide to your business command center.

Table of contents

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.
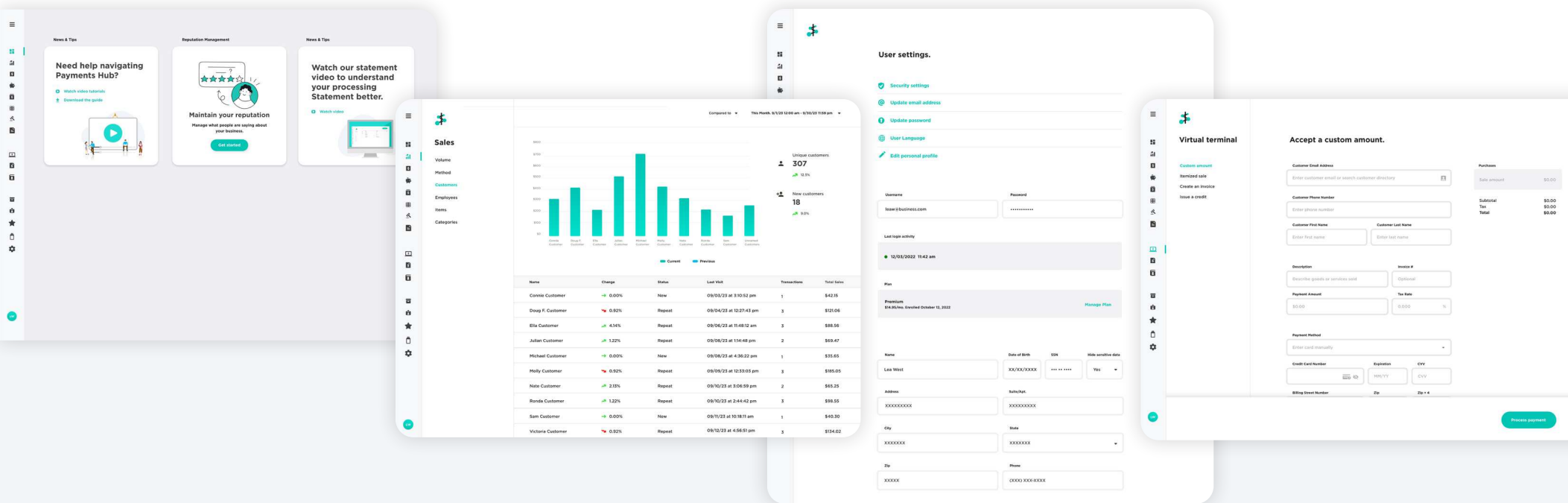
Plans & pricing.

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

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 change your plan under User Settings.

Note: Features listed apply to EPX accounts only.

	Free $0.00/mo	Premium $14.95/mo	Premium Plus $29.95/mo	Payanywhere Pay As You Go Premium Plus $0.00/mo	Payanywhere Custom Pricing Free $0.00/mo	Payanywhere Custom Pricing Premium Plus $29.95/mo
Sales	✓	✓	✓	✓	✓	✓
Transactions	✓	✓	✓	✓	✓	✓
Batch	✓	✓	✓	✓	✓	✓
Deposits	✓	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓	✓
Disputes	✓	✓	✓	✓	✓	✓
Statements	✓	✓	✓	✓	✓	✓
Employees	✓	✓	✓	✓	✓	✓
Virtual Terminal	✓	✓	✓	✓	✓	✓
Invoices			✓	✓		✓
Reputation Management		✓	✓	✓		✓
Factor 4 Gift Card		✓	✓	✓		✓
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.

1

- Dashboard
- Sales
- Transactions
- Deposits
- Batches
- Reports
- Disputes
- Statements

2

- Virtual Terminal
- Invoices
- Customers

3

- Inventory
- Employees
- Reputation
- Hardwares & Supplies
- Business Settings

Enable historic hardware mode

4

Lea West

LW Lea West
Owner

News & Tips

Need help navigating Payments Hub?

▶ Watch video tutorials

⬇ Download the guide

Statem

Augu

EPX

July 2

EPX

June

EPX

Leaw@company.com

3333334444488888
Premium Member

User Settings

Live Chat

Log Out

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.

⚠ You're in historic hardware mode. Payanywhere transactional data and other standard features are not available Disable Now

News & Tips

Statements

Need help navigating Payments Hub?

▶ Watch video tutorials

⬇ Download the guide

August 2023
EPX

July 2023
EPX

June 2023
EPX

historic hardware mode

LW

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.*

Q Search

This Month. 9/1/23 12:00 am - 9/30/23 11:59 pm ▾   ↗ Export

Transactions

1,023	$89,450.85	-$2,340.50	$87,110.35
Transactions	Collected	Refunds & Voids	Net Sales

All Transactions

All Sales

Gift Card

Credit Sales

Debit Sales

Cash Sales

Pre-Auths

Virtual Terminal

Invoices

Refunds

Voids

1099K

Declined Transactions

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

LW

Getting started.

User Settings. XX

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

Sidebar navigation

- ☰
- Dashboard
- Sales
- Transactions
- Deposits
- Virtual Terminal
- Invoices
- Customers
- Inventory
- Employees
- Reputation
- Hardwares & Supplies
- Business Settings

Lea West ▼

LW **Lea West**
Owner

User settings.

- 🛡 **Security settings**
- @ **Update email address**
- 🔒 **Update password**
- 🌐 **User Language**
- ✏ **Edit personal profile**

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.

Update your email and password that you use to log in to Payments Hub and/or the Payanywhere app.

View or edit your Payments Hub plan information.

Username

leaw@business.com

Password

••••••••••••

Last login activity

● 12/03/2022 11:42 am

Plan

Premium
$14.95/mo. Enrolled October 12, 2022

Manage Plan

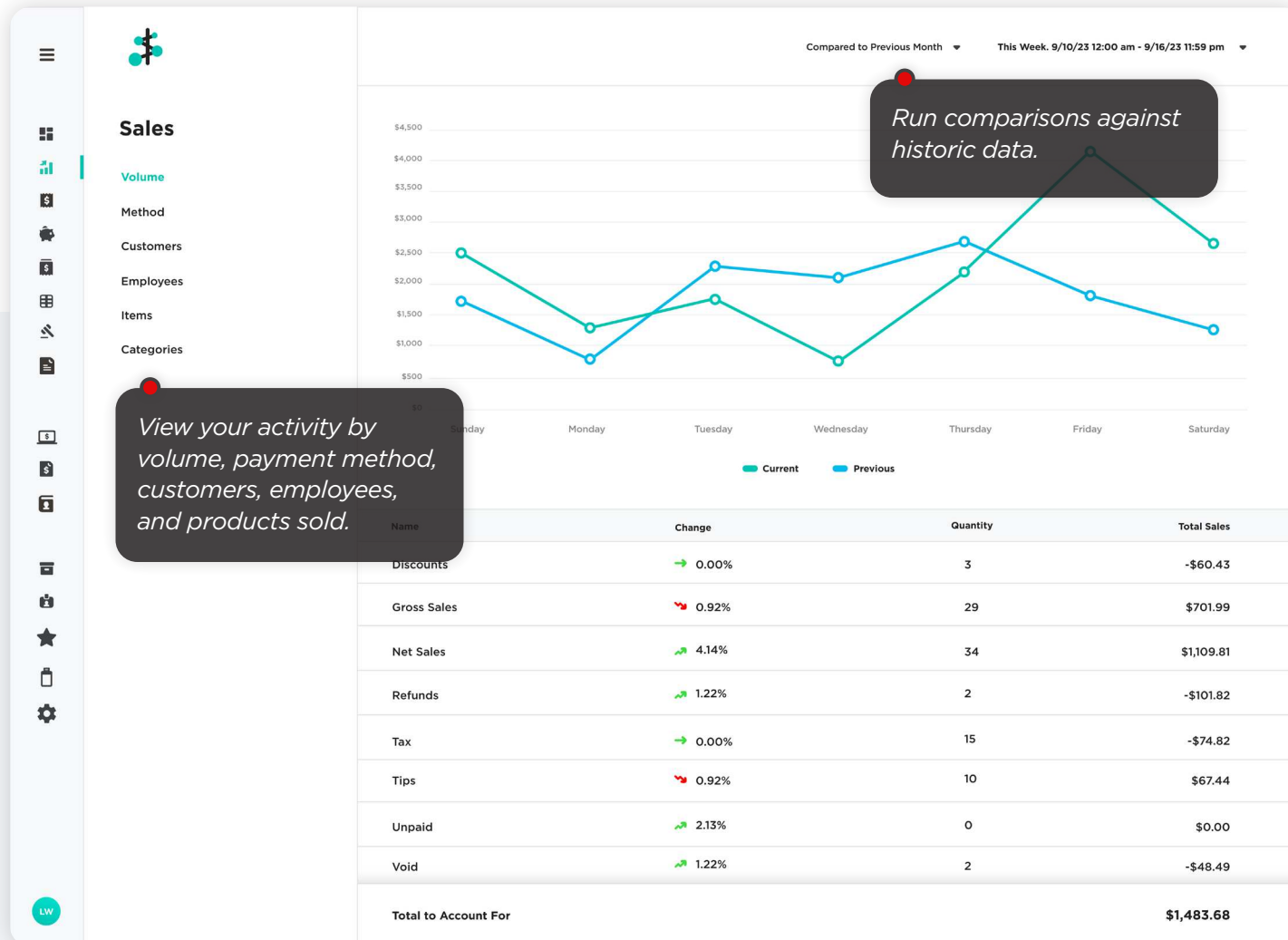| Name	Date of Birth	SSN	Hide sensitive data
Lea West	XX/XX/XXXX	••• •• ••••	Yes ▼

Address

Suite/Apt.

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.

News & Tips

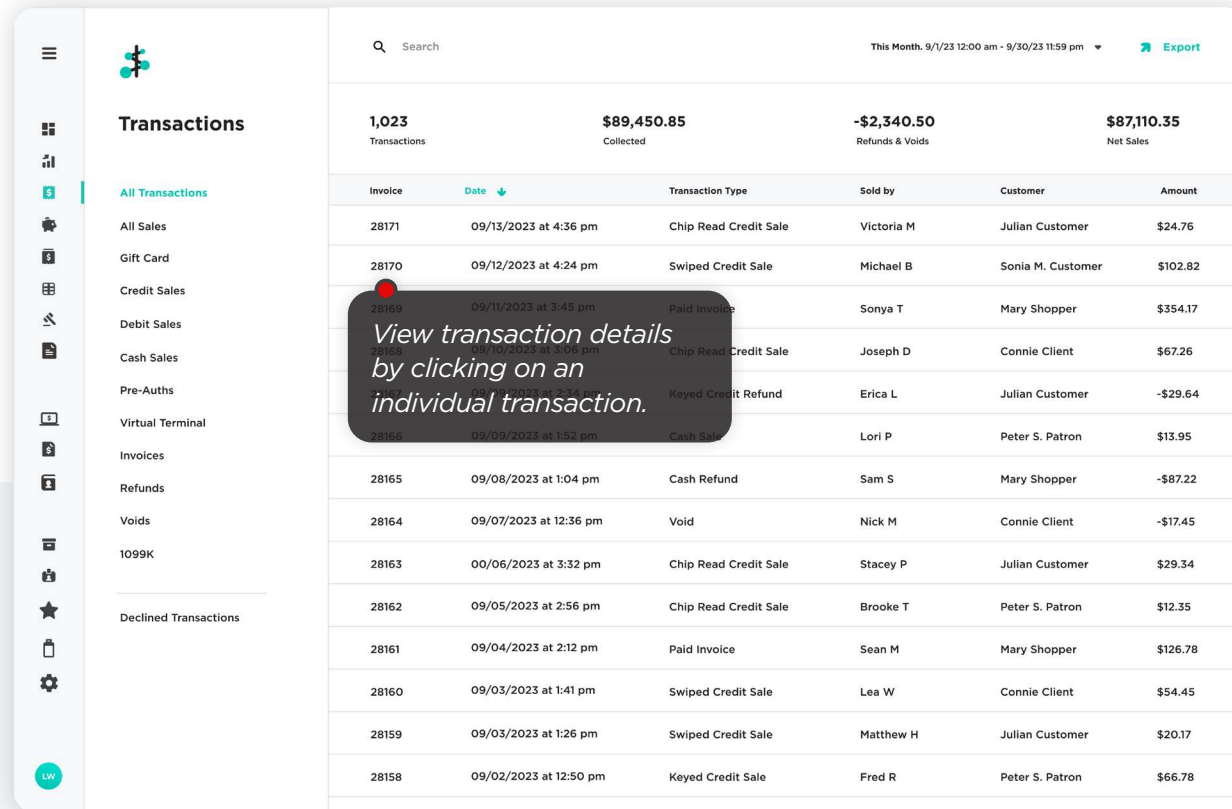### Need help navigating Payments Hub?

▶ Watch video tutorials

⬇ Download the guide

Reputation Management

Maintain your reputation

Manage what people are saying about your business.

Get started

News & Tips

Watch our statement video to understand your processing Statement better.

▶ Watch video

Activity.

Sales. 📊

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

Run comparisons against historic data.

View your activity by volume, payment method, customers, employees, and products sold.

Name	Change	Quantity	Total Sales
Discounts	→ 0.00%	3	-$60.43
Gross Sales	↘ 0.92%	29	$701.99
Net Sales	↗ 4.14%	34	$1,109.81
Refunds	↗ 1.22%	2	-$101.82
Tax	→ 0.00%	15	-$74.82
Tips	↘ 0.92%	10	$67.44
Unpaid	↗ 2.13%	0	$0.00
Void	↗ 1.22%	2	-$48.49
Total to Account For			**$1,483.68**

Activity.

Transactions. 🧾

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

View transaction details by clicking on an individual transaction.

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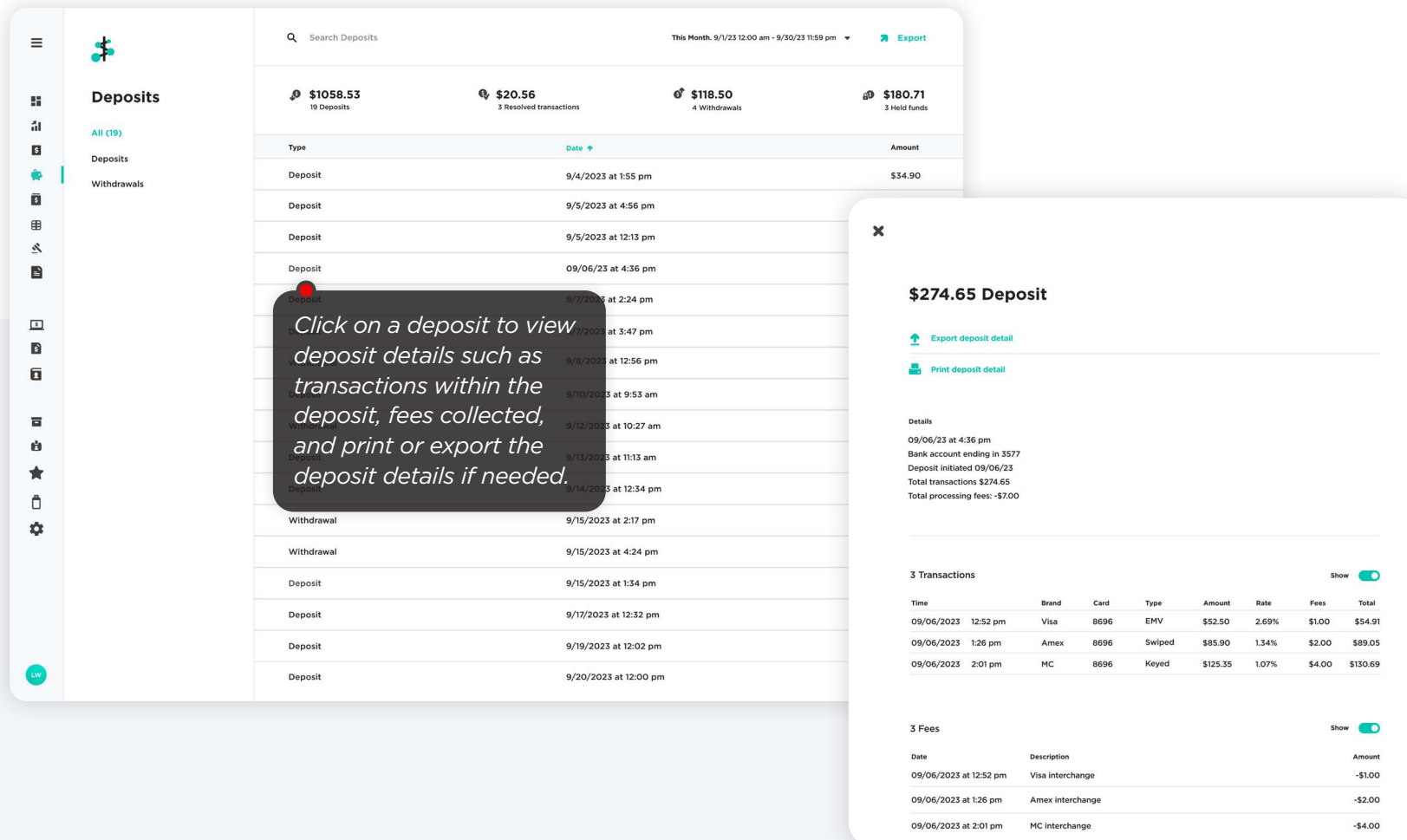
Open Transactions — Payanywhere only: Manual Close merchants can view and close their open transactions.
If applicable, merchants using tip adjust may also add and save tips to their open transactions.

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.

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.

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

Batches table (first screen):

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		217 Transactions	
September 26, 2023		185 Transactions	
September 25, 2023		113 Transactions	
September 24, 2023		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	

Top summary: 28 Batches · 6,731 Sales · 238 Refunds · $168,091.87 Gross Sales

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

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.

Reports

All Reports
Sales Reports
Customer Reports
Employee Reports
Inventory Reports

What does Total Collected mean?

Account Summary
A breakdown of gross and net sales for all your accounts.

Batch Detail
The sum of all your authorized credit card transactions for the day at close business, or by the designated batch closing time.

Batch Summary
An overview of your batches with totals.   ↗ Export

Card Brand Summary
View sales totals for credit transactions by card brand.

Customer Export
Export a listing of your customers and their contact information.

Customer Experience
A summary of customer feedback by name, date, invoice number, rating, and employee.

Customer Performance
Track top customers and see their spending habits.

Deposit Detail
The transactions and related fees within each deposit and withdrawal posted to your bank account.

Deposit Summary
An overview of your deposits with net totals.

Disputes Report
View the status of your disputes.

Employee Flash Report
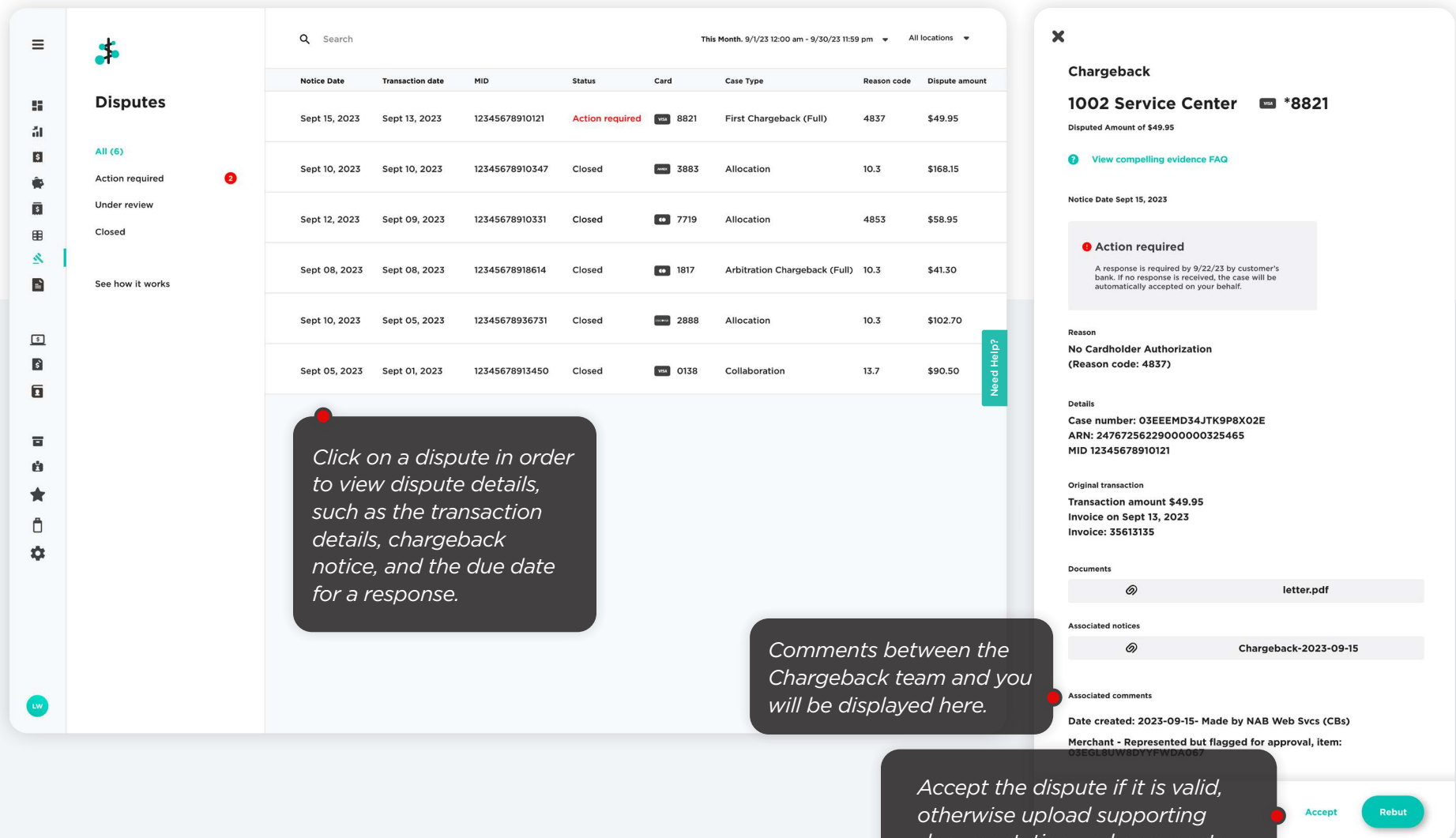Totals for net sales, discounts, tax, tips, voids, refunds, and payment methods by single employee.

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.

Disputes

All (6)

Action required **2**

Under review

Closed

See how it works

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	AMEX 3883	Allocation	10.3	$168.15
Sept 12, 2023	Sept 09, 2023	12345678910331	Closed	7719	Allocation	4853	$58.95
Sept 08, 2023	Sept 08, 2023	12345678918614	Closed	1817	Arbitration Chargeback (Full)	10.3	$41.30
Sept 10, 2023	Sept 05, 2023	12345678936731	Closed	2888	Allocation	10.3	$102.70
Sept 05, 2023	Sept 01, 2023	12345678913450	Closed	VISA 0138	Collaboration	13.7	$90.50

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

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

Chargeback

1002 Service Center   VISA ***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: 03EGL8UW8DYYFWDA067

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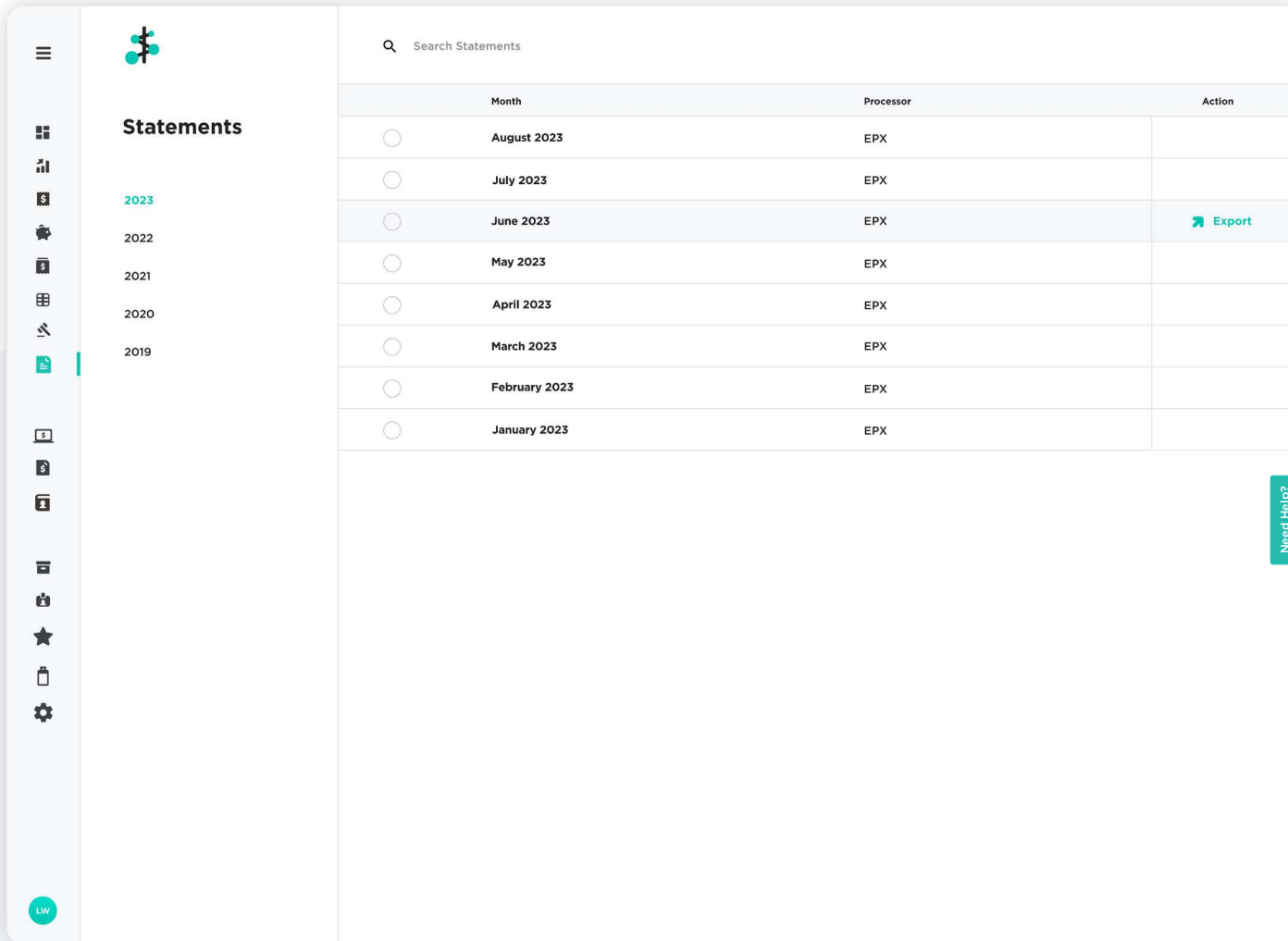
Accept   Rebut

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

16

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.
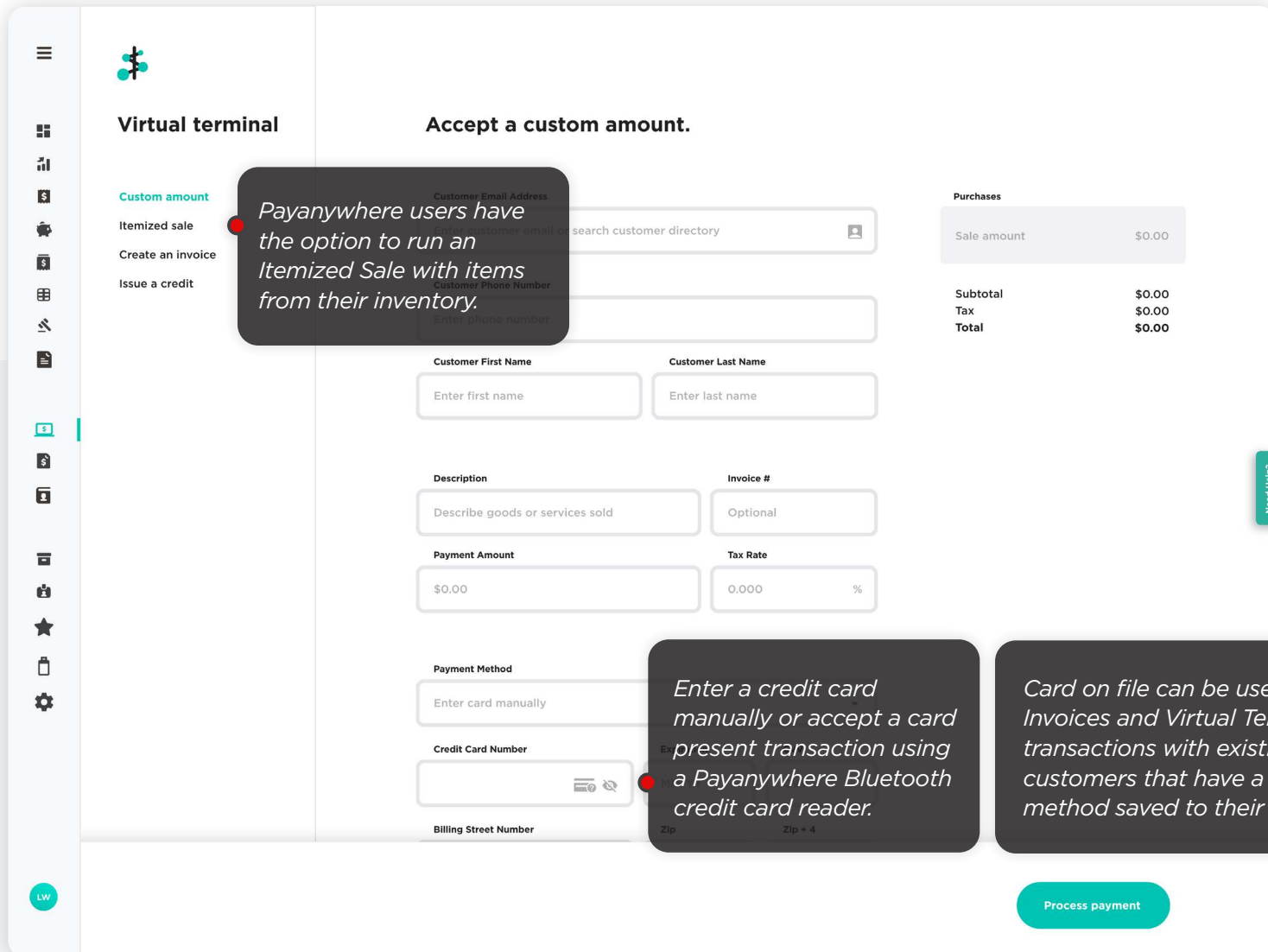
Statements

		Month	Processor	Action
2023	○	August 2023	EPX	
2022	○	July 2023	EPX	
2021	○	June 2023	EPX	↗ Export
2020	○	May 2023	EPX	
2019	○	April 2023	EPX	
	○	March 2023	EPX	
	○	February 2023	EPX	
	○	January 2023	EPX	

Search Statements

Need Help?

LW

Payments.

Virtual Terminal. 💻

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

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

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

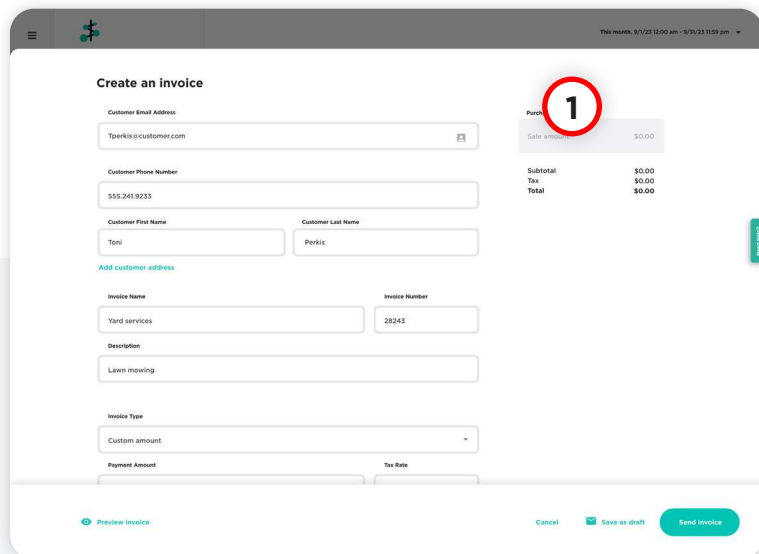Your customer receives the invoice via email or SMS text with a link to their secure payment portal.

3

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

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.

Name	Email Address	Phone Number	Transactions
Stacey Aarron	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

Search Customers

Export

Export your customer list as a .csv file.

Customers

Add Customer

Average rating
4.4

Ratings
1,754

★★★★★ 201
★★★★ 776
★★★ 107
★★ 55
★ 12

Edit Customer

🗑 Delete

First Name
Stacey

Last Name
Aarron

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

The Customers section is only available for Payanywhere users.

Business Management.

Inventory. 📦

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

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.

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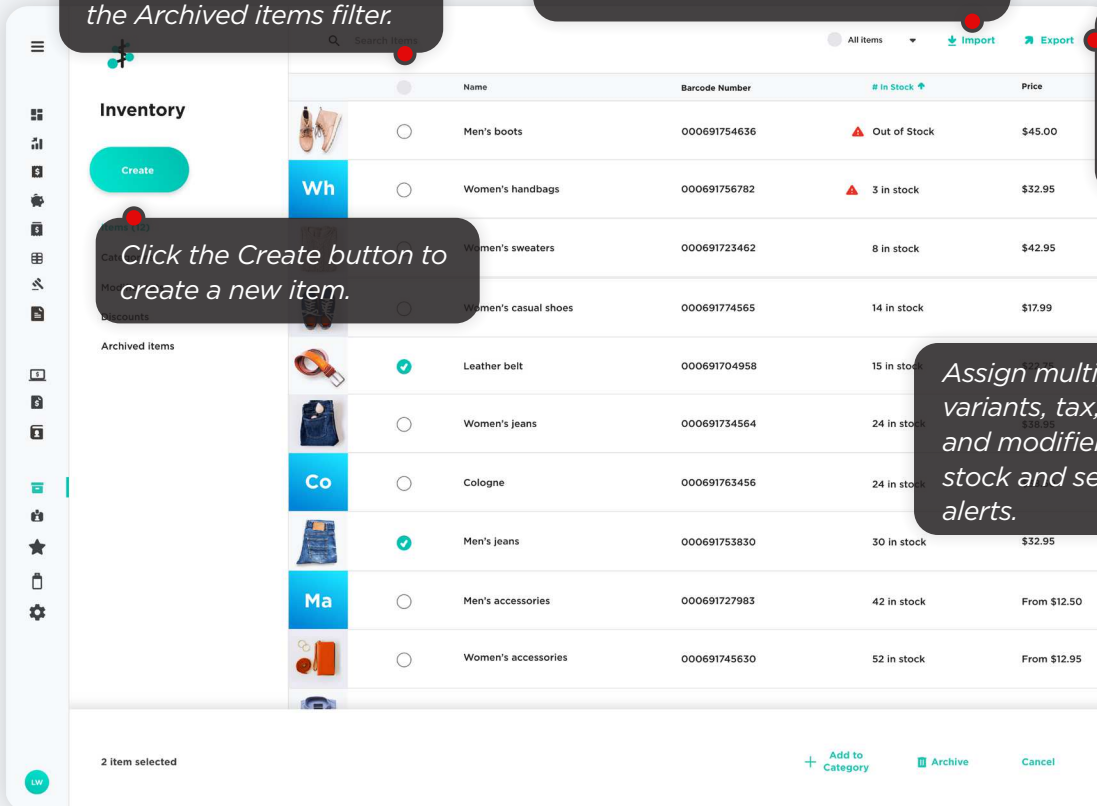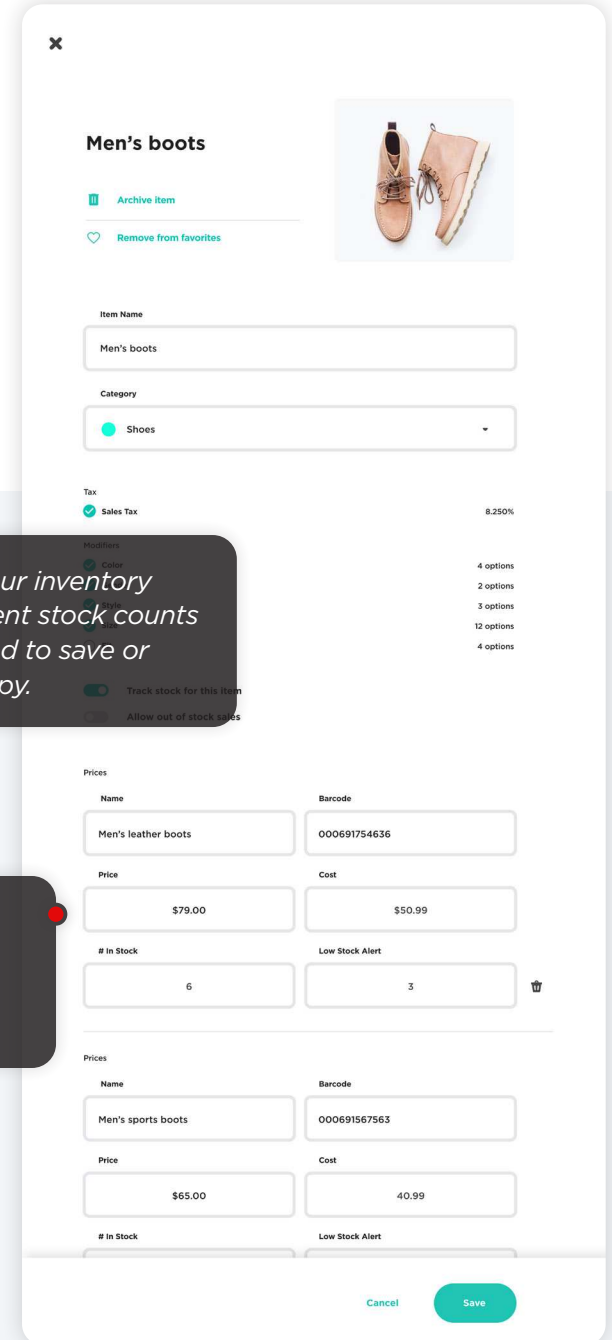
Export your inventory with current stock counts if you need to save or print a copy.

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.

Inventory

Create

Archived items

		Name	Barcode Number	# In Stock ↑	Price
	○	Men's boots	000691754636	⚠ Out of Stock	$45.00
Wh	○	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
	✓	Leather belt	000691704958	15 in stock	
	○	Women's jeans	000691734564	24 in stock	
Co	○	Cologne	000691763456	24 in stock	
	✓	Men's jeans	000691753830	30 in stock	$32.95
Ma	○	Men's accessories	000691727983	42 in stock	From $12.50
	○	Women's accessories	000691745630	52 in stock	From $12.95

All items   ⬇ Import   ↗ Export

2 item selected

+ Add to Category   🗑 Archive   Cancel

Men's boots

🗑 Archive item

♡ Remove from favorites

Item Name

Men's boots

Category

● Shoes ▾

Tax

✓ Sales Tax   8.250%

Modifiers
- Color   4 options
-                2 options
-                3 options
-                12 options
-                4 options

◉ Track stock for this item

○ Allow out of stock sales
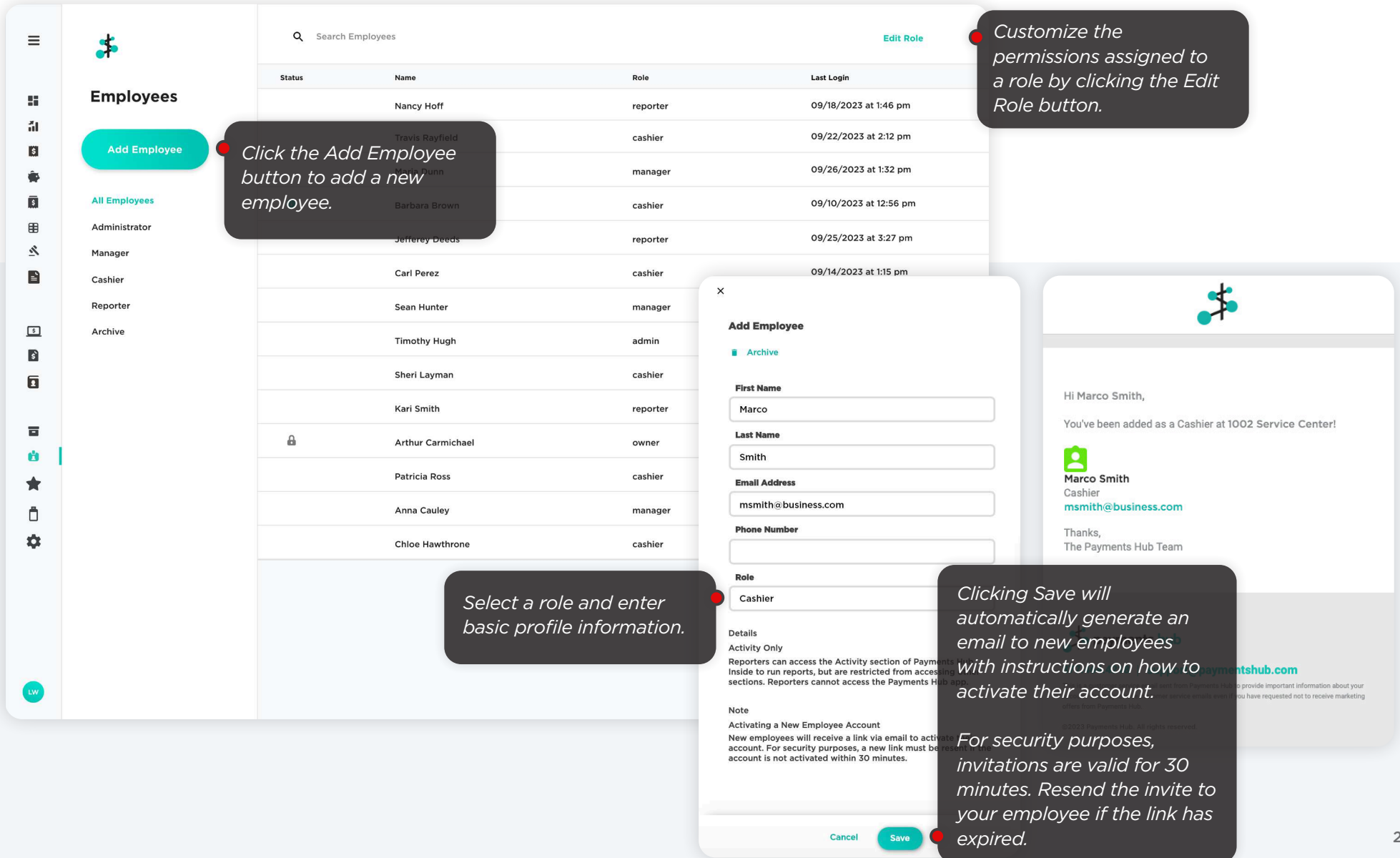
Prices

Name	Barcode
Men's leather boots	000691754636
Price	**Cost**
$79.00	$50.99
# In Stock	**Low Stock Alert**
6	3	🗑

Prices

Name	Barcode
Men's sports boots	000691567563
Price	**Cost**
$65.00	40.99
# In Stock	**Low Stock Alert**

Cancel   Save

The Inventory section is only available for Payanywhere users.

Business Management.

Employees. 🪪

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

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
	Lyle Dunn	manager	09/26/2023 at 1:32 pm
	Barbara Brown	cashier	09/10/2023 at 12:56 pm
	Jefferey 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 Hawthrone	cashier	

Employees

Add Employee

All Employees
Administrator
Manager
Cashier
Reporter
Archive

Q Search Employees

Edit Role

Customize the permissions assigned to a role by clicking the Edit Role button.

Click the Add Employee button to add a new employee.

Add Employee

🗑 Archive

First Name
Marco

Last Name
Smith

Email Address
msmith@business.com

Phone Number

Role
Cashier

Details
Activity Only
Reporters can access the Activity section of Payments Inside to run reports, but are restricted from accessing sections. Reporters cannot access the Payments Hub app.

Note
Activating a New Employee Account
New employees will receive a link via email to activate account. For security purposes, a new link must be resent in the account is not activated within 30 minutes.

Cancel   Save

Select a role and enter basic profile information.

Hi Marco Smith,

You've been added as a Cashier at 1002 Service Center!

Marco Smith
Cashier
msmith@business.com

Thanks,
The Payments Hub Team

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.

22

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.		✔ *Only on the Payanywhere app.*	
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.

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

Notifications

Get a daily email summary when you have new reviews for up to five (5) recipients.

Send alerts to

✅ Email   owner@gmail.com

✅ Email   manager@gmail.com

➕ **Modify email recipients**

Reputation

Trends
Customer Reviews
Competitor Performance

Settings

Connect account

Sign in to your Google account to view and respond to customer reviews.

G **Google Reviews**   Paulie's Punch Out   ⋮
✅ Connected

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

Reputation

Trends
Customer Reviews
Competitor Performance

Settings

This Week. 3/12/23 12:00 am - 3/18/23 11:59 am ▾

Overall Satisfaction Score
⭐⭐⭐⭐½
Average from 793 total reviews

Positive vs. Negative Reviews
😊 744   😐 38   ☹️ 11
Reviews are 94% positive

Reputation Change
📈 22%
Trending upward from last week

Most Recent

Wright Hook — Yesterday 💬 ⭐⭐⭐⭐⭐
Knockout Nina — Yesterday ⭐⭐⭐⭐
Mysterious Stranger — 3 days ago 💬 ⭐⭐⭐⭐

Competitor Performance

Karl's Kickboxing ⭐⭐ 578 reviews
Jim's Gym ⭐⭐⭐ 217 reviews
➕ Add

😊 😐 ☹️
23 215 340

😊 😐 ☹️
33 2 182

Most Common Words

friendly boxing clean
class great service
paulie sparring instructor
Lessons workout

112 Ratings
⭐⭐⭐⭐
Average

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.

✖️

G **Google Review**

Positive Pete

March 16, 2023

⭐⭐⭐⭐⭐

Pete said:
"I'm ready for any contender. Thanks, Paulie!"
03/16/2023 at 5:42pm

Respond to Pete   Clear

Thanks for the feedback. Visit us again soon!

😊 **Positive (4-5 starts)**

We're happy you had a great...

Use promo code "TKO" for your next lesson.

Thanks for the feedback. Visit us again soon!

😊 **Positive (3 starts)**

Thank you for sharing your feedback! We hope to see you again soon so that we can make your next visit even better.

Cancel   Send

Create custom default quick replies for each review category.

Reputation Management is only available to Payments Hub Premium and Premium Plus users.
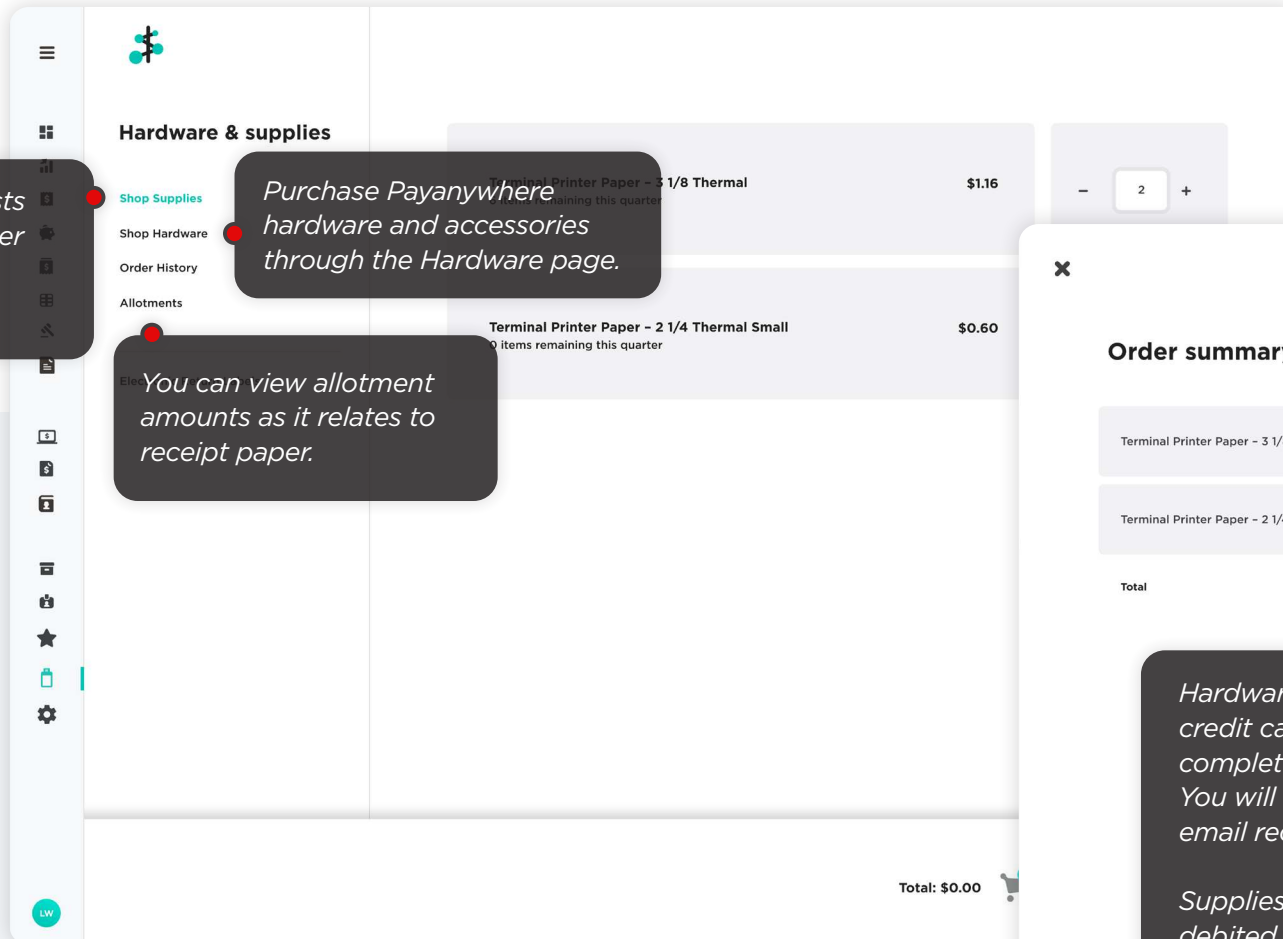
Business Management.

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.

Hardware & supplies

Shop Supplies

Shop Hardware

Order History

Allotments

Thermal Printer Paper – 3 1/8 Thermal $1.16

Terminal Printer Paper – 2 1/4 Thermal Small $0.60
0 items remaining this quarter

Total: $0.00

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.

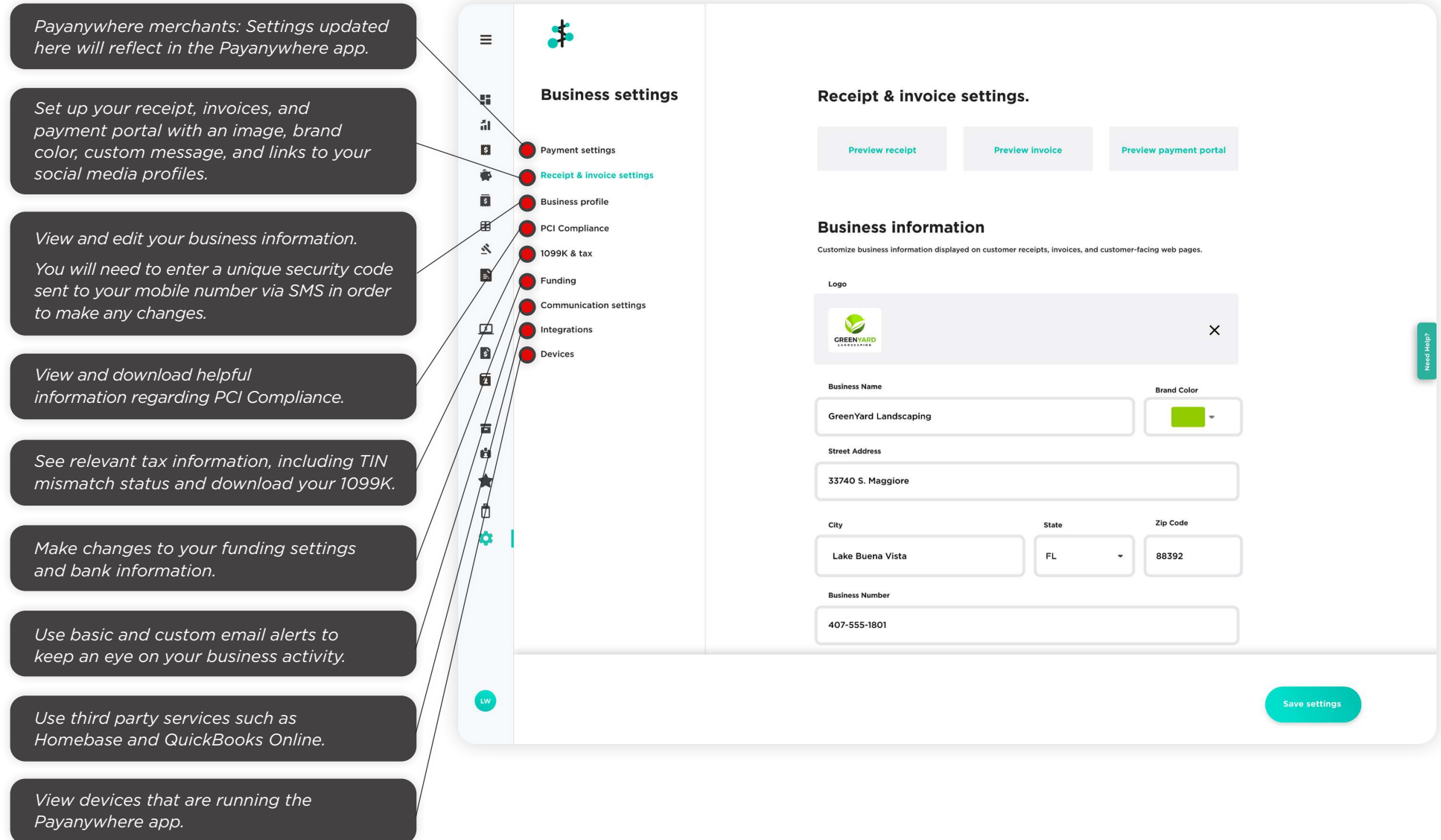*Set up your receipt, invoices, and payment portal with an image, brand color, custom message, and links to your social media profiles.*

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

LW

Receipt & invoice settings.

| Preview receipt | Preview invoice | Preview payment portal |

Need Help?

Business information

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

Logo

GREENYARD LANDSCAPING ✕

| Business Name | Brand Color |
| GreenYard Landscaping | |

Street Address
33740 S. Maggiore

| City | State | Zip Code |
| Lake Buena Vista | FL | 88392 |

Business Number
407-555-1801

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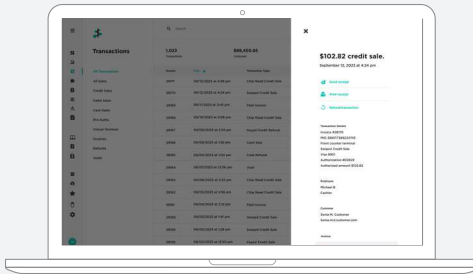
Merchants who are enrolled via Simplified Enrollment already have credentials and will use those to log in to the portal. Registration is not required.

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.
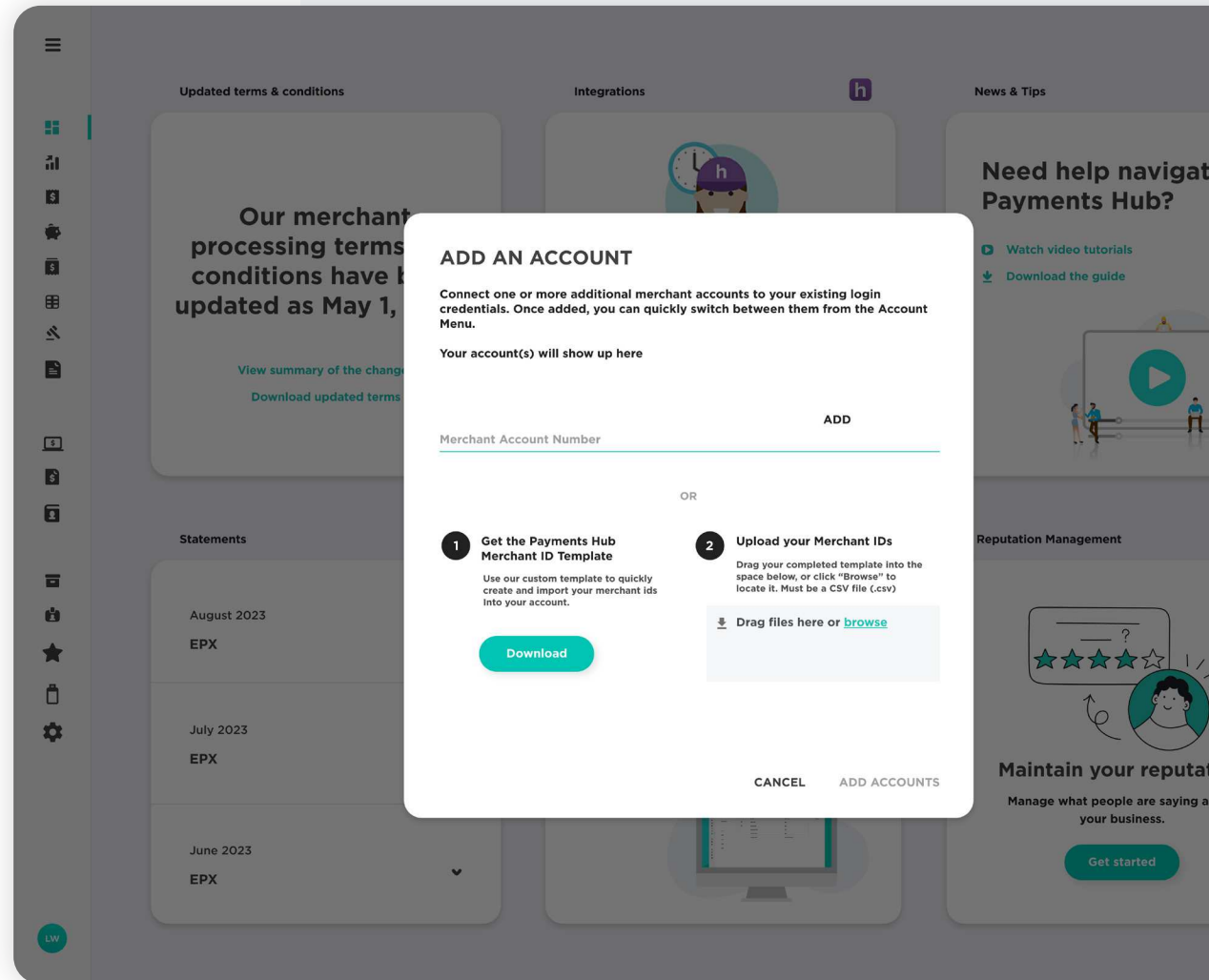
Viewing processing activity.
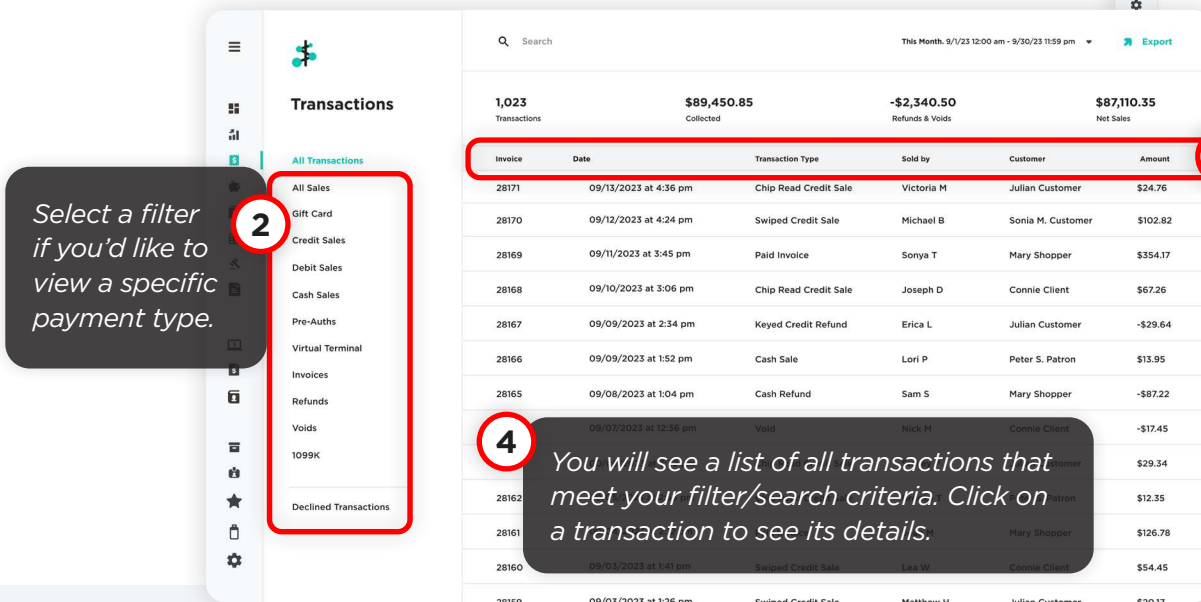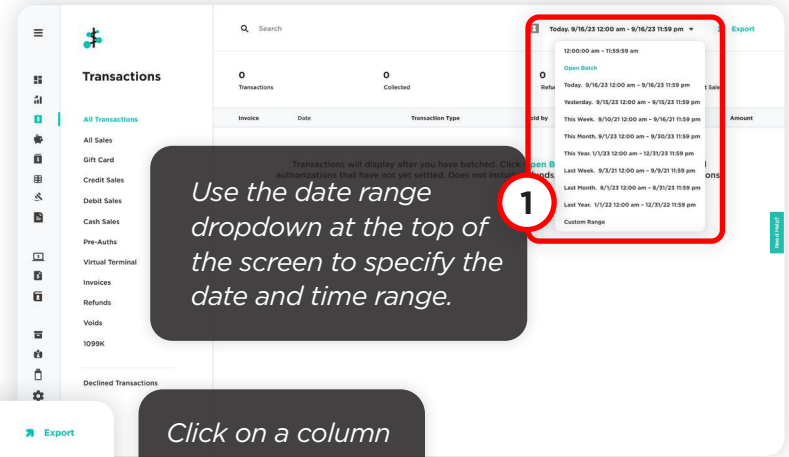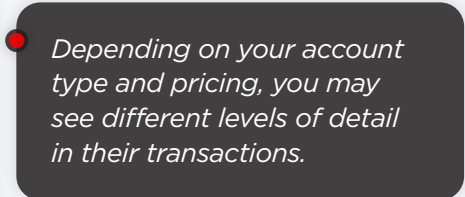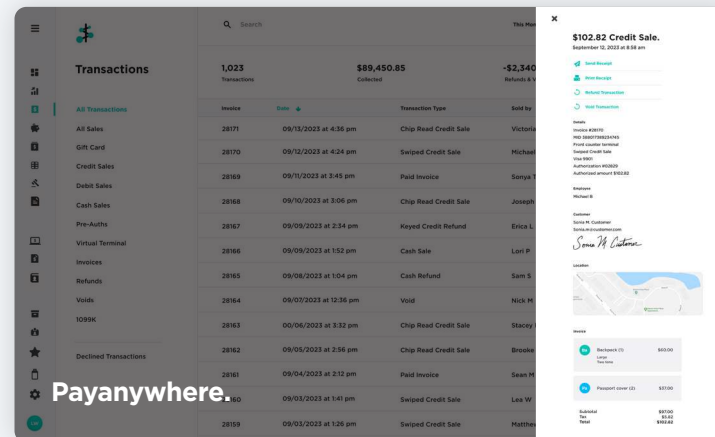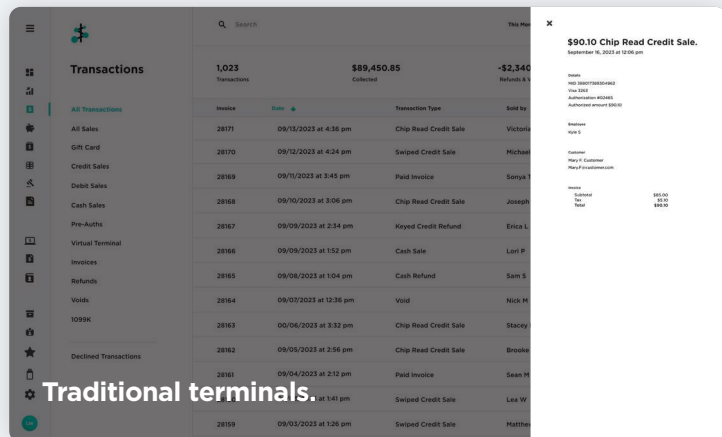
Transactions.

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.

Use the date range dropdown at the top of the screen to specify the date and time range. **1**

Click on a column header to filter your data in ascending or descending order of that header. **3**

Select a filter if you'd like to view a specific payment type. **2**

You will see a list of all transactions that meet your filter/search criteria. Click on a transaction to see its details. **4**

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.

Traditional terminals.

Payanywhere.

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

> *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.

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

31

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.

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

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.

Batches (first screen)

28 Batches

$168,091.87 Gross Sales

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

Export

Date ↓	Batch #		Gross Sales
September 30, 2023	5938829169367	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	5938239074389		
	5933453456789		

Batches (second screen)

Date ↓	Batch #
September 30, 2023	
September 29, 2023	
September 28, 2023	
September 27, 2023	5938883459041
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	5938239074389

Batch Detail

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

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

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.
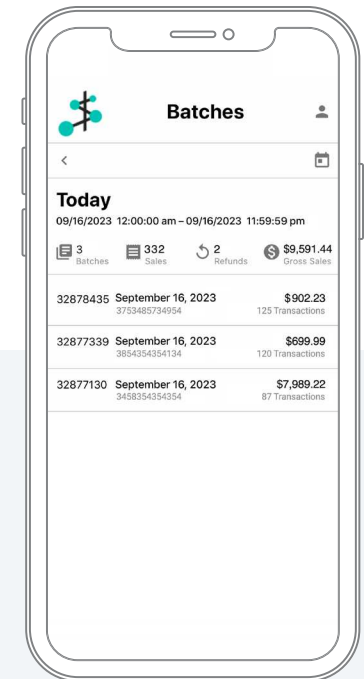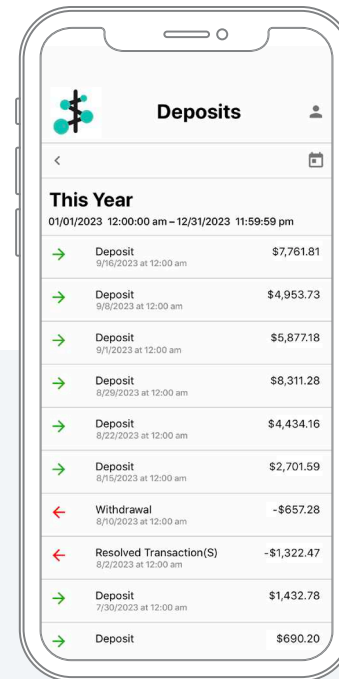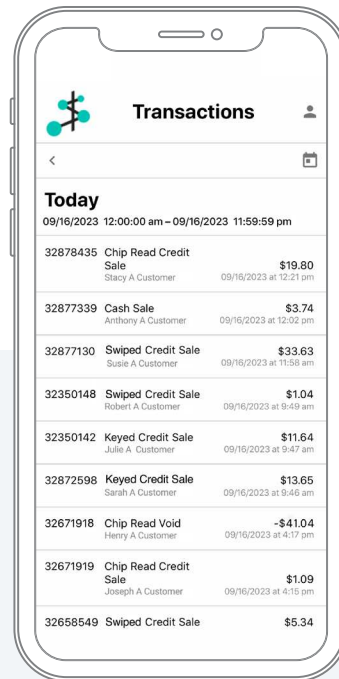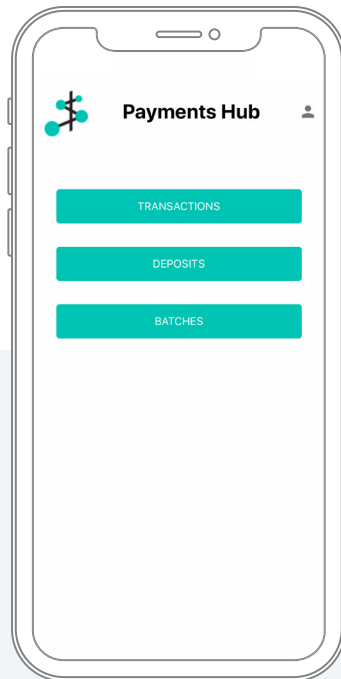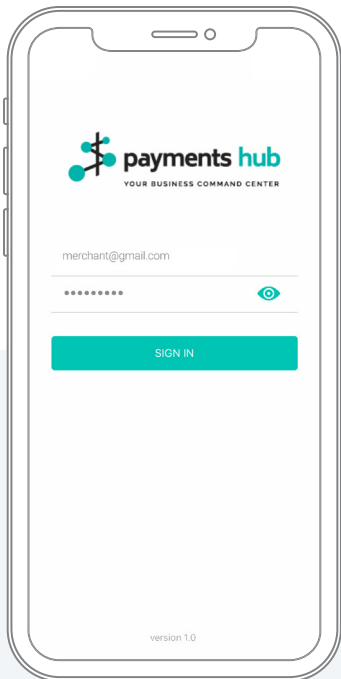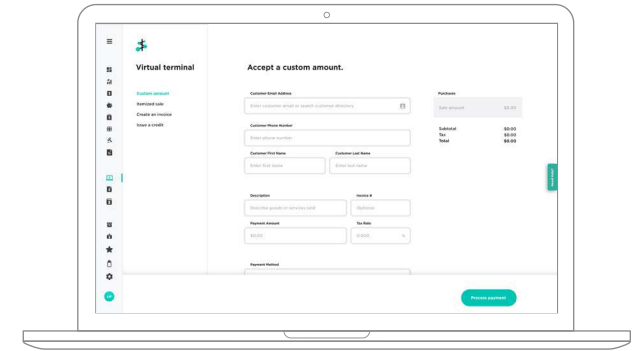
Accepting a payment.

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.
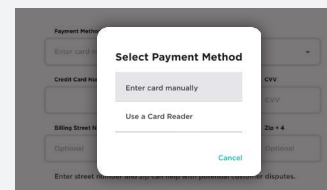
4. Click Start Reader and wait for reader to initiate.

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.

User settings.

🛡 **Security settings**

@ **Update email address**

🔒 **Update password**

🌐 **User Language**

✏ **Edit personal profile**

Username

leaw@business.com

Password

••••••••••

Last login activity

● 12/03/2022 11:42 am

Plan

Premium
$14.95/mo. Enrolled October 12, 2022

Manage Plan

Need Help?

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