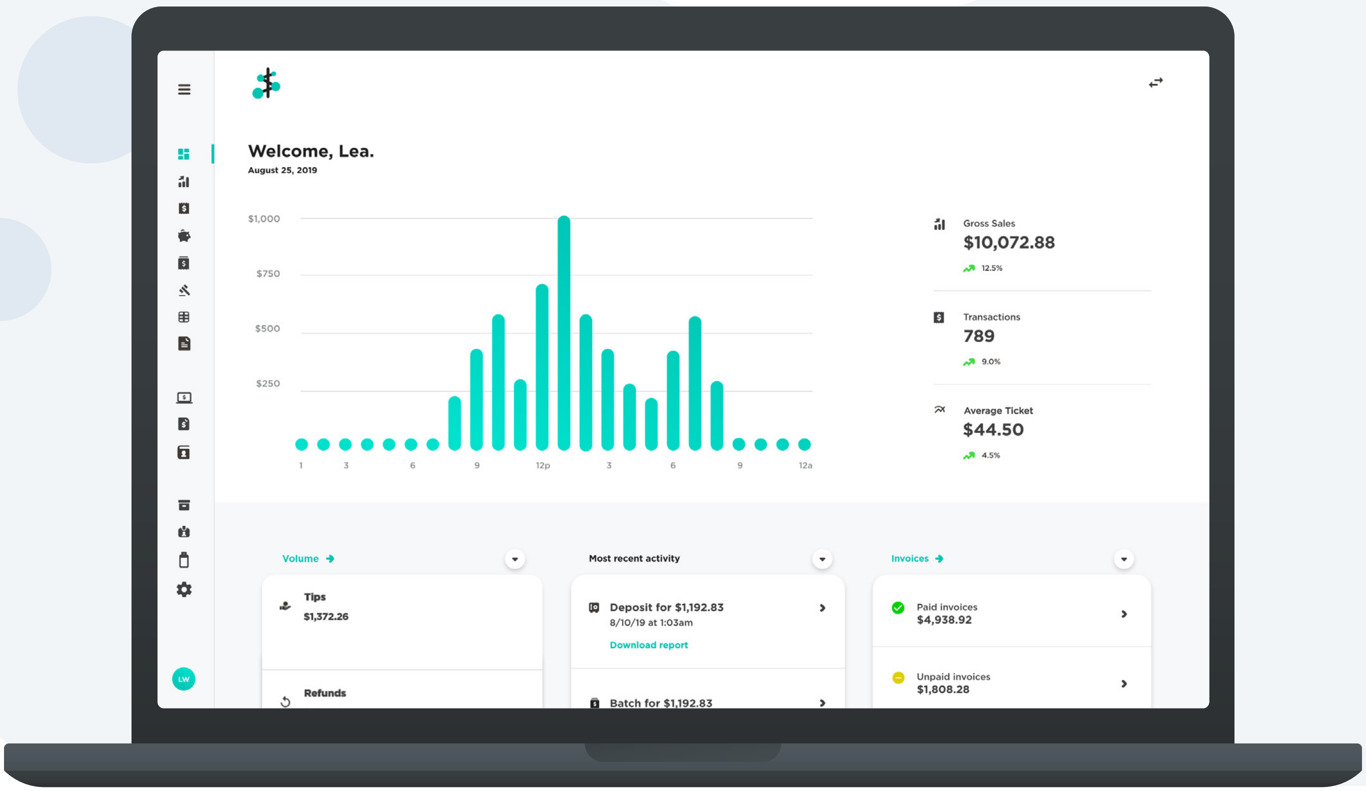
payments hub

Your guide to your business command center.

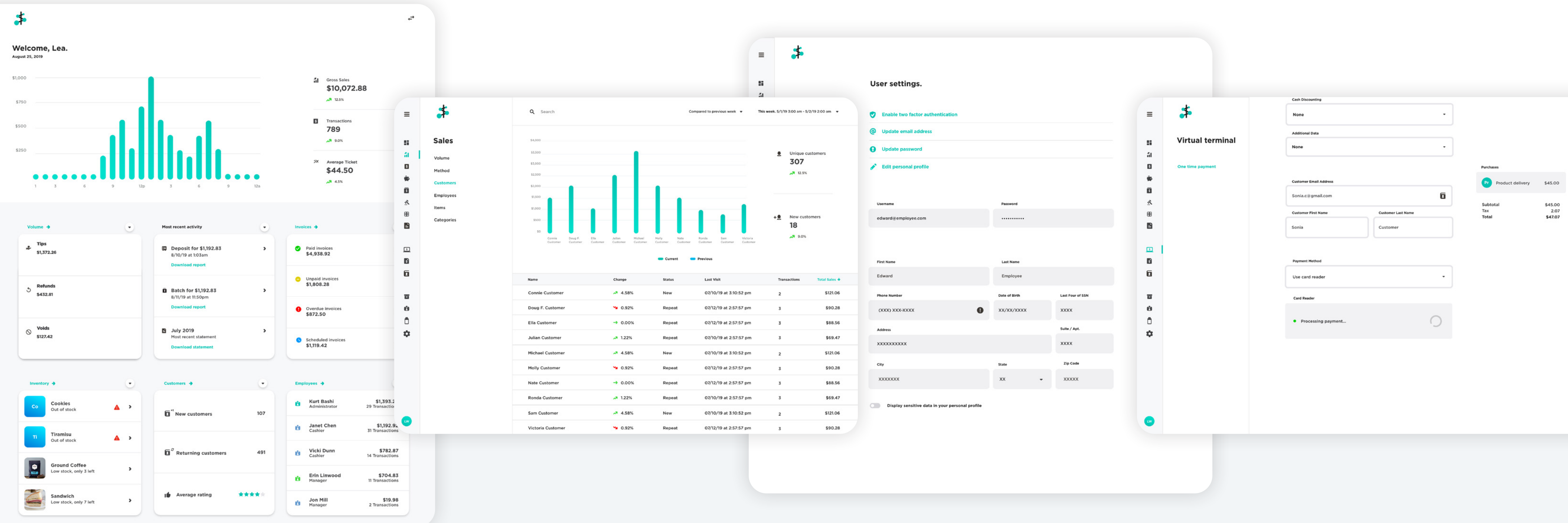


Contents.

What is Payments Hub?

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 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.



	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		✓	✓		✓
Autopay		✓	✓		✓
Disputes	✓	✓	✓	✓	✓
Inventory			✓	✓	✓
Free Paper Allotment		✓	✓	✓	✓
Free Ground Shipping		✓	✓		✓
Terminal Warranty		✓	✓		✓

Plans & Pricing

Payments Hub offers a Free and Premium plan.

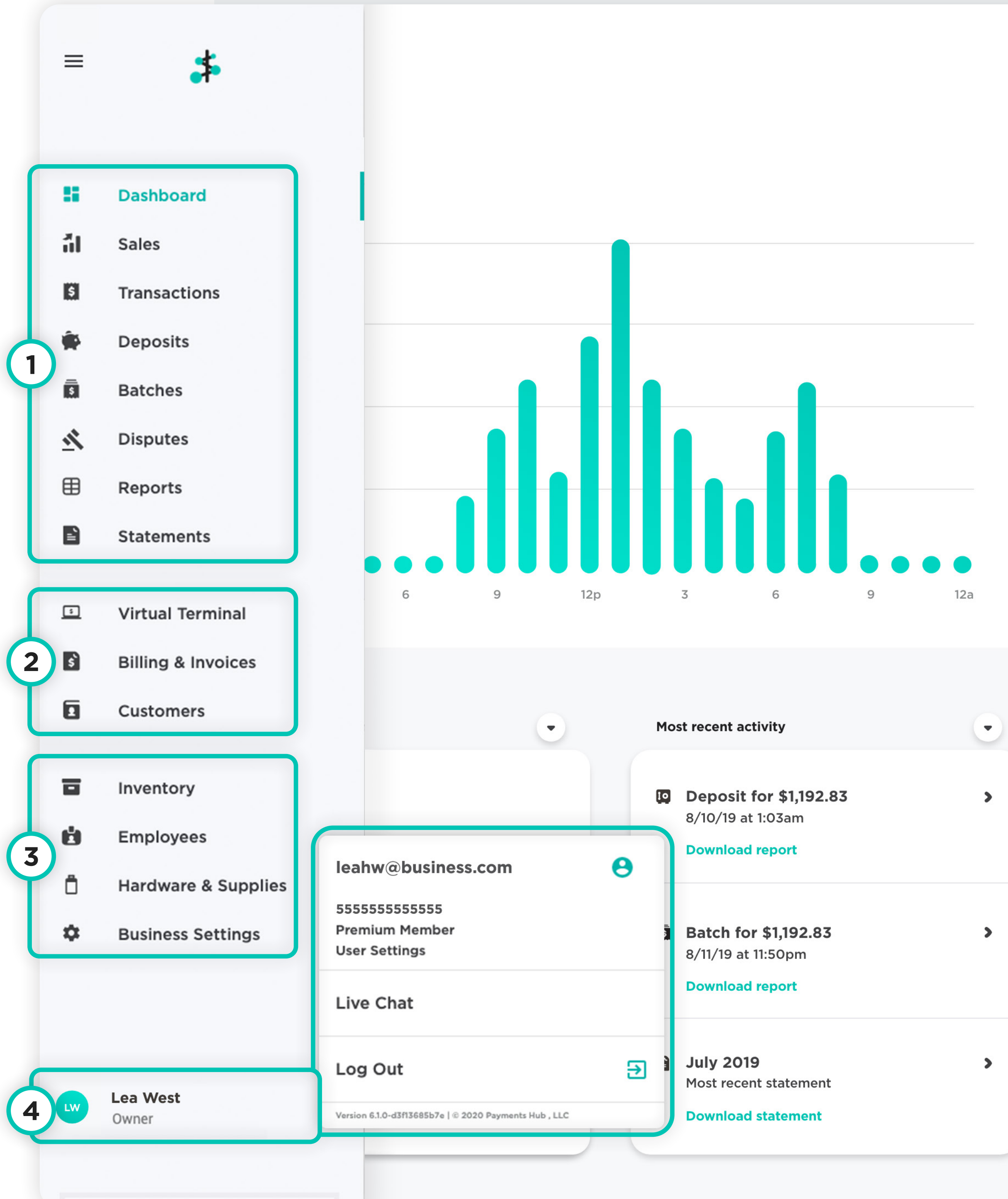
New merchants are automatically enrolled in a 60-day free trial of the Premium plan. After the trial, you will be charged $14.95/mo, unless you choose to downgrade to the Free plan.

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, Disputes, Reports, and Statements.
2. **Payments** - Virtual Terminal, Invoices, and Customers.
3. **Business Management** - Inventory, Employees, Hardware & Supplies, and Business Settings.
4. **User Settings** are 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.



Basic Page Structure

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

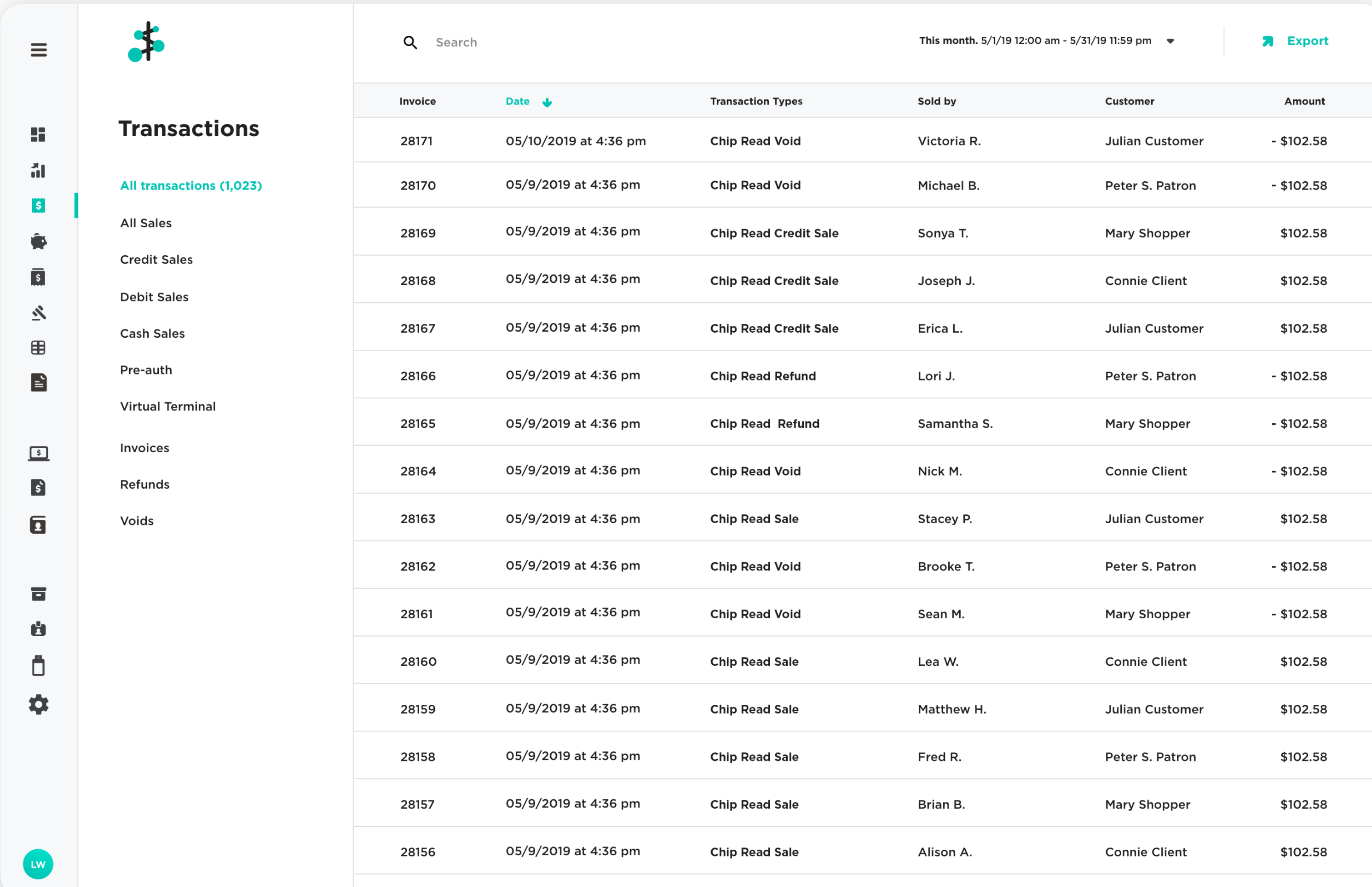
Toolbar - *Search and filter your data.*

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.*

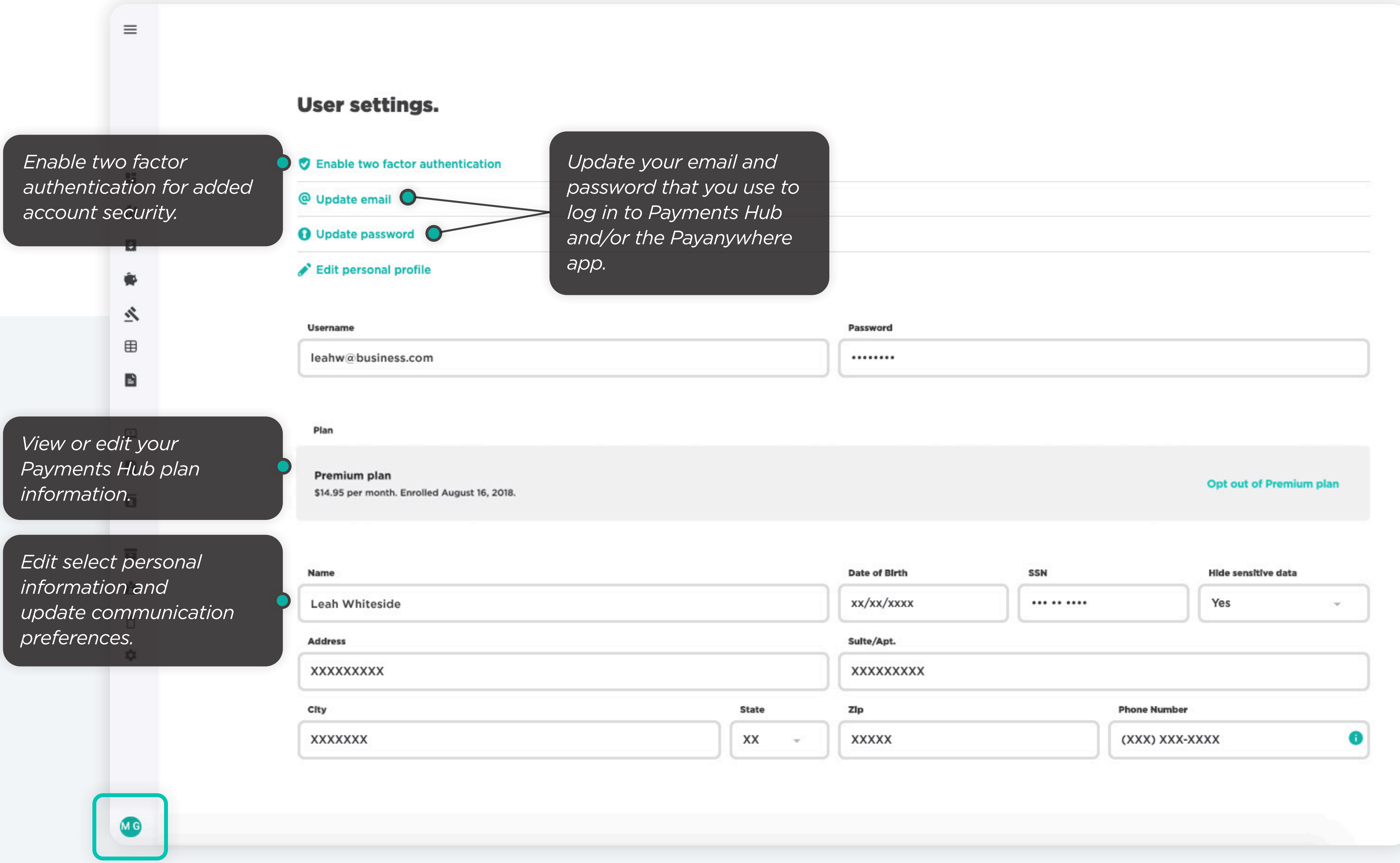
Left panel - *Use the panel to quickly filter data.*

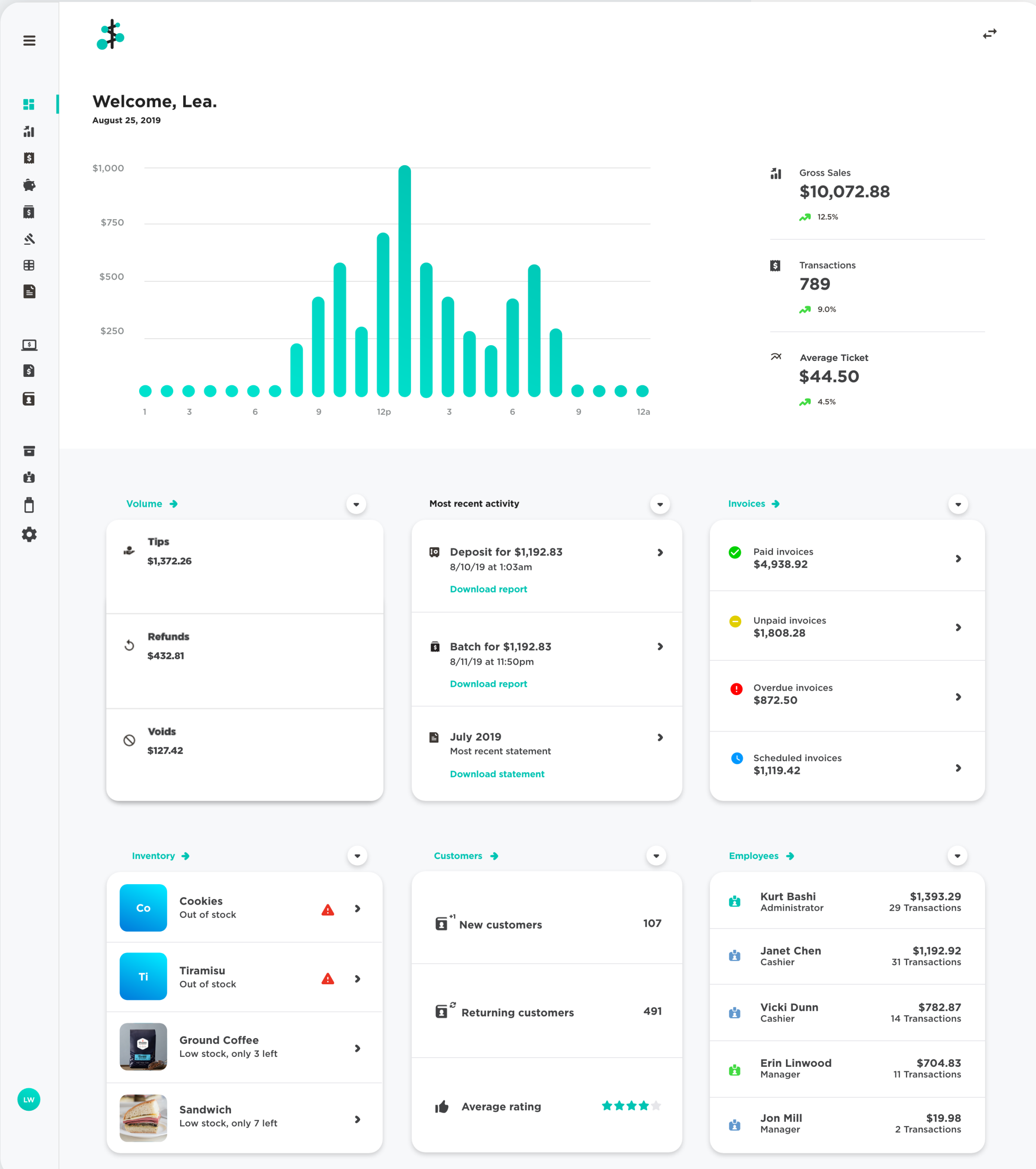


Invoice	Date	Transaction Types	Sold by	Customer	Amount
28171	05/10/2019 at 4:36 pm	Chip Read Void	Victoria R.	Julian Customer	- $102.58
28170	05/9/2019 at 4:36 pm	Chip Read Void	Michael B.	Peter S. Patron	- $102.58
28169	05/9/2019 at 4:36 pm	Chip Read Credit Sale	Sonya T.	Mary Shopper	$102.58
28168	05/9/2019 at 4:36 pm	Chip Read Credit Sale	Joseph J.	Connie Client	$102.58
28167	05/9/2019 at 4:36 pm	Chip Read Credit Sale	Erica L.	Julian Customer	$102.58
28166	05/9/2019 at 4:36 pm	Chip Read Refund	Lori J.	Peter S. Patron	- $102.58
28165	05/9/2019 at 4:36 pm	Chip Read Refund	Samantha S.	Mary Shopper	- $102.58
28164	05/9/2019 at 4:36 pm	Chip Read Void	Nick M.	Connie Client	- $102.58
28163	05/9/2019 at 4:36 pm	Chip Read Sale	Stacey P.	Julian Customer	$102.58
28162	05/9/2019 at 4:36 pm	Chip Read Void	Brooke T.	Peter S. Patron	- $102.58
28161	05/9/2019 at 4:36 pm	Chip Read Void	Sean M.	Mary Shopper	- $102.58
28160	05/9/2019 at 4:36 pm	Chip Read Sale	Lea W.	Connie Client	$102.58
28159	05/9/2019 at 4:36 pm	Chip Read Sale	Matthew H.	Julian Customer	$102.58
28158	05/9/2019 at 4:36 pm	Chip Read Sale	Fred R.	Peter S. Patron	$102.58
28157	05/9/2019 at 4:36 pm	Chip Read Sale	Brian B.	Mary Shopper	$102.58
28156	05/9/2019 at 4:36 pm	Chip Read Sale	Alison A.	Connie Client	$102.58

XX User Settings

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



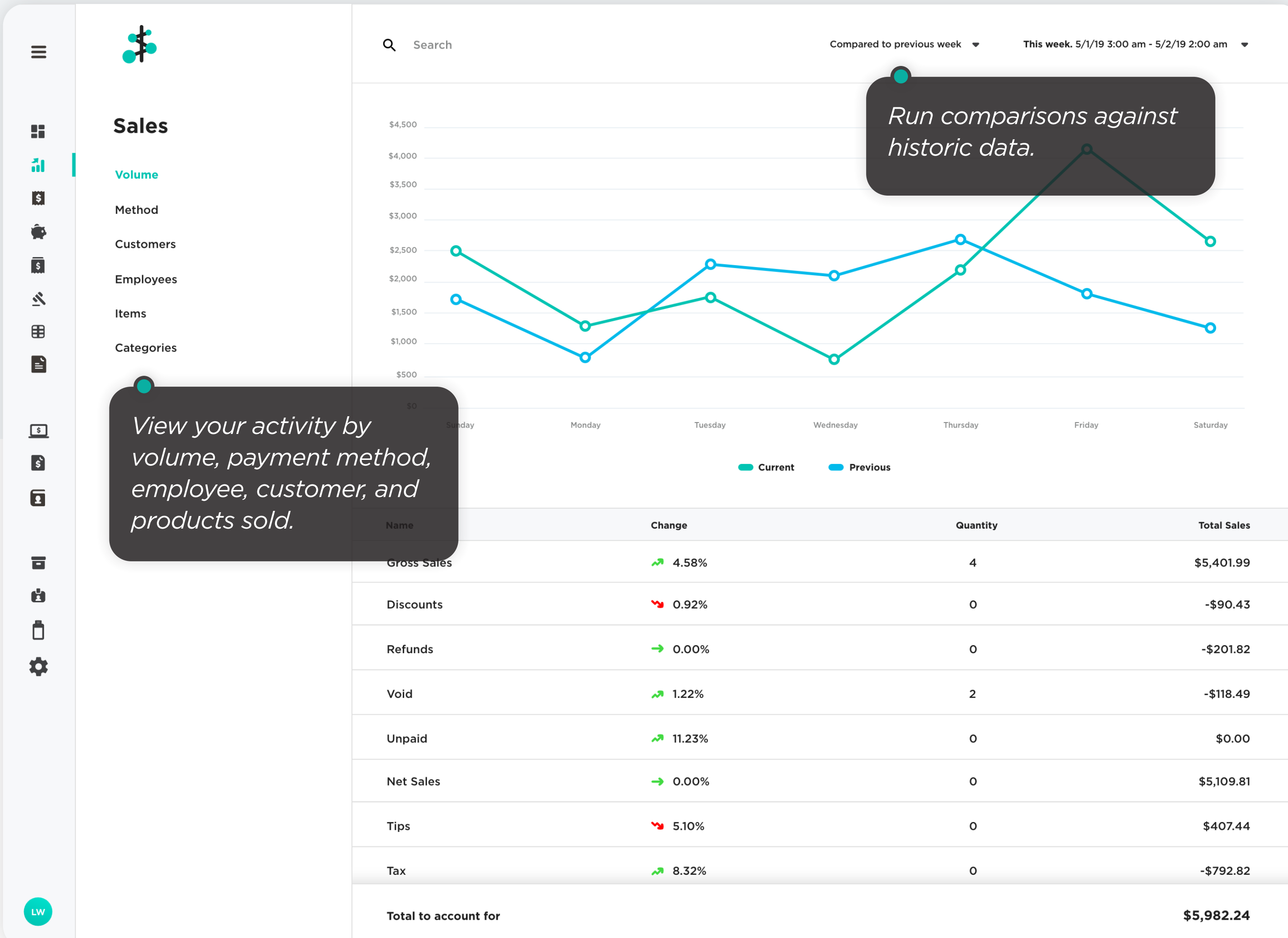


Dashboard

This is the default home screen when you log in. Here you'll get a quick overview of your most recent activity, including volume, your latest deposit, employee performance, top customers, and other helpful information.

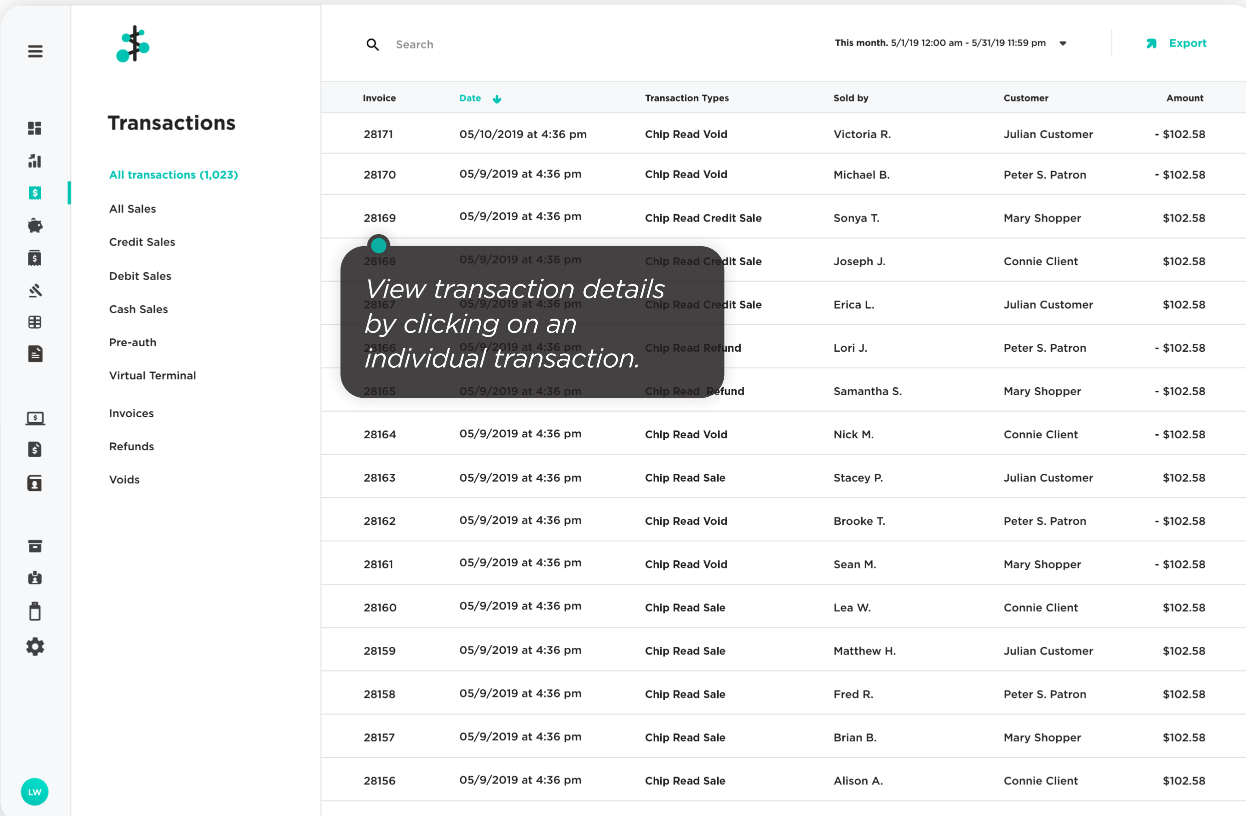
Sales

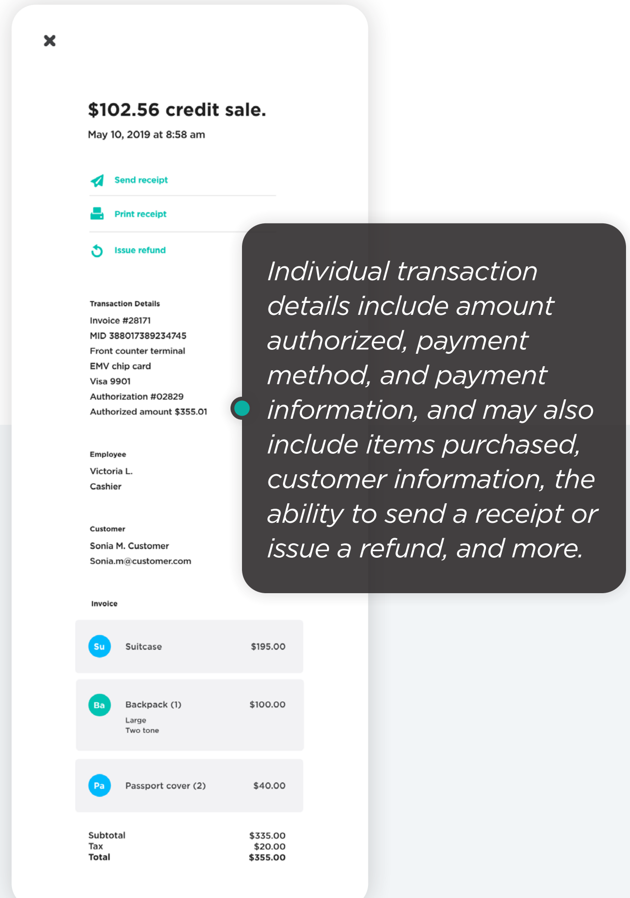
See a breakdown of your sales activity with the help of charts and graphs.



Transactions

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



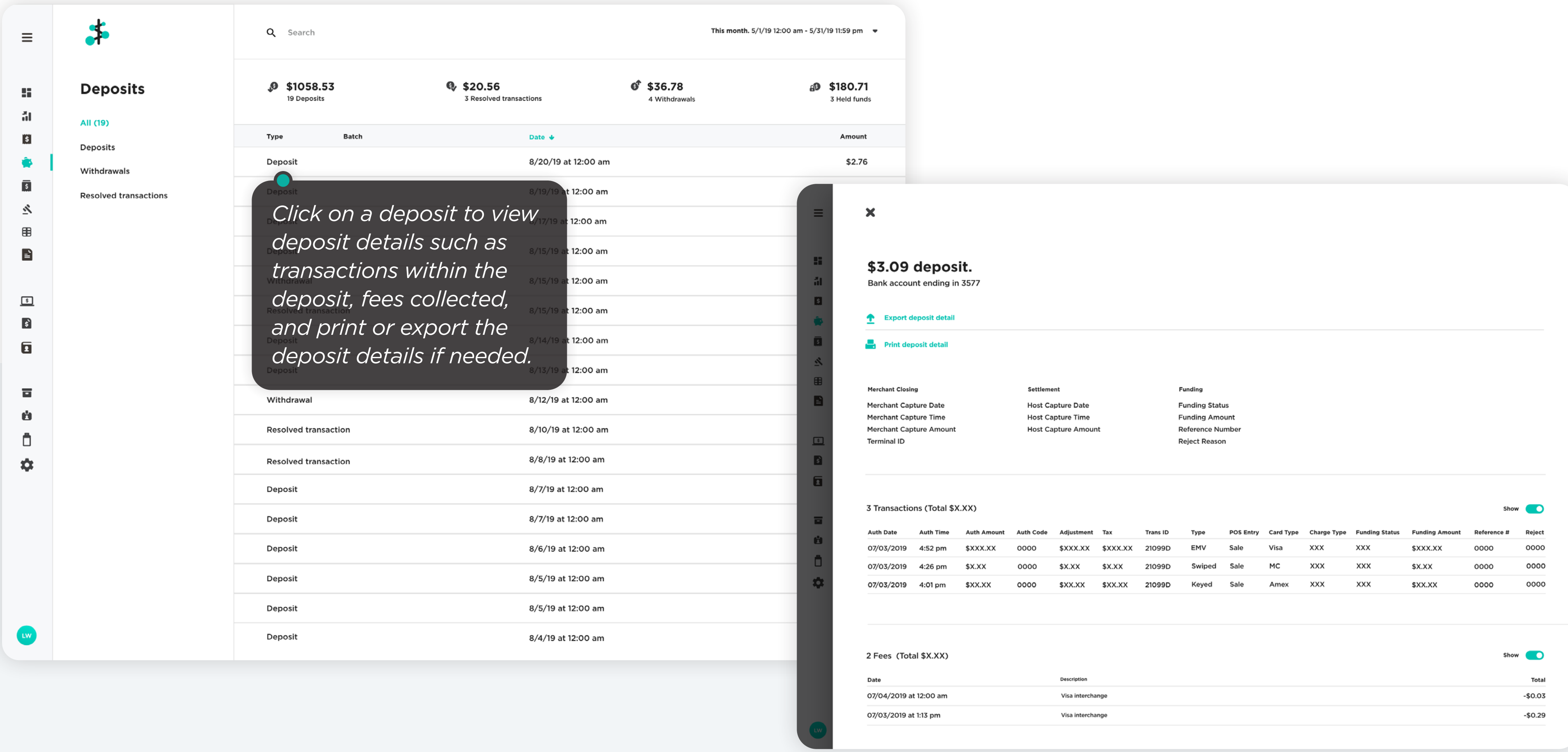


Where are today's transactions? Transactions will display after you have batched. Open Batch is a list of live credit card authorizations that have not yet settled and does not include refunds, cash, and virtual terminal transactions.

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

Deposits

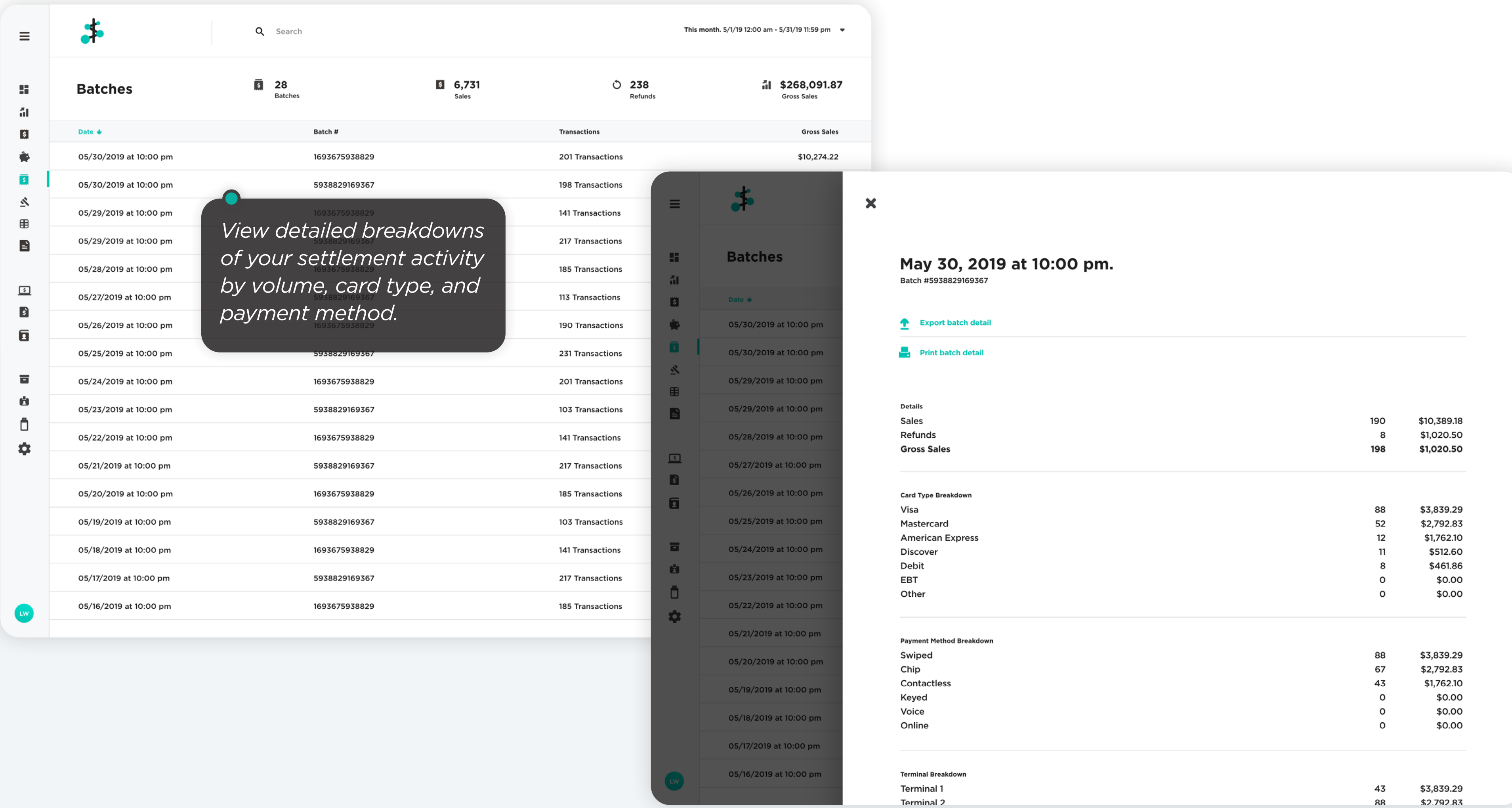
View a list of incoming and outgoing activity from your bank account based on transaction and settlement activity.



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

Batches

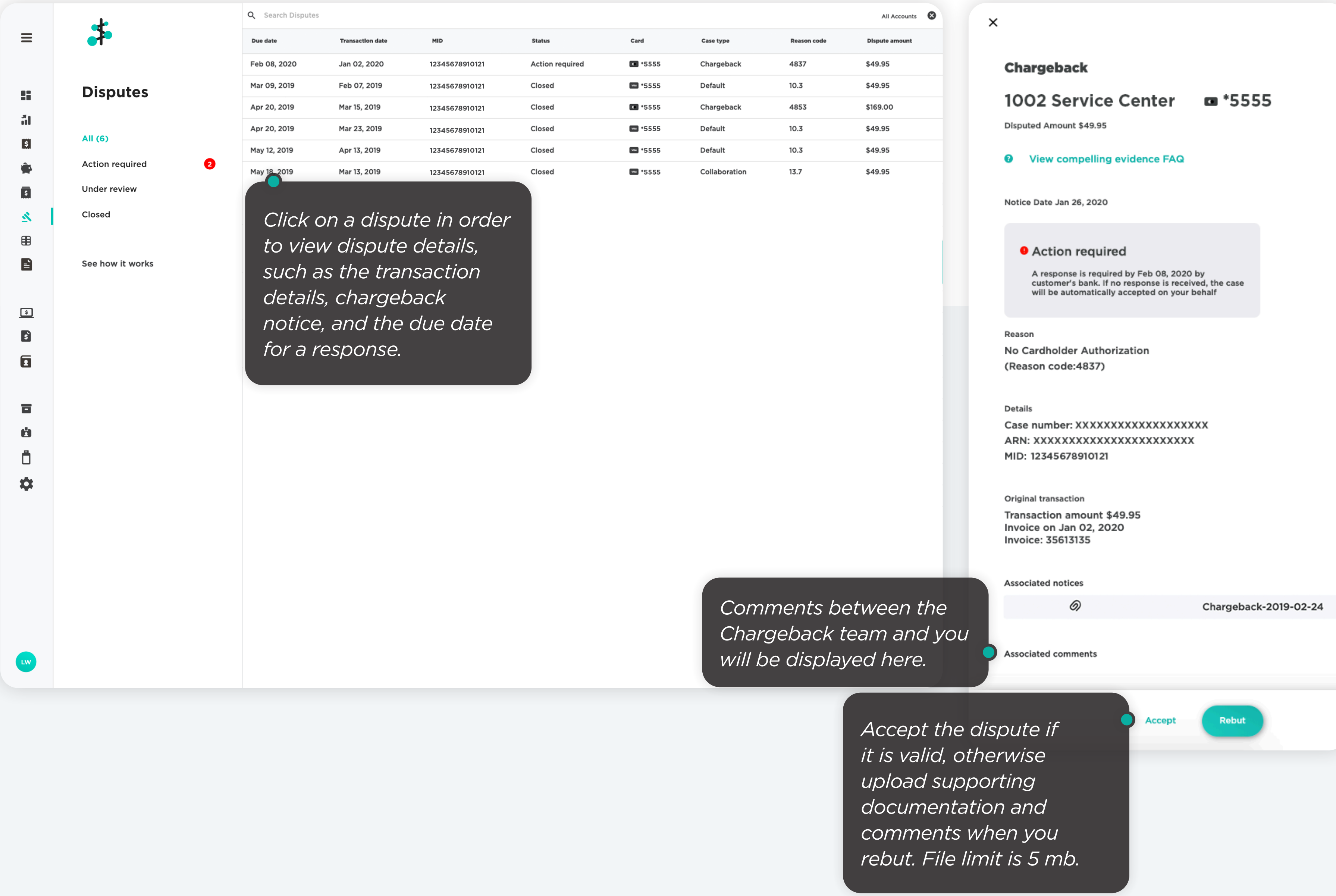
Batches are a record of the transactions you've closed and sent for settlement.



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

Disputes

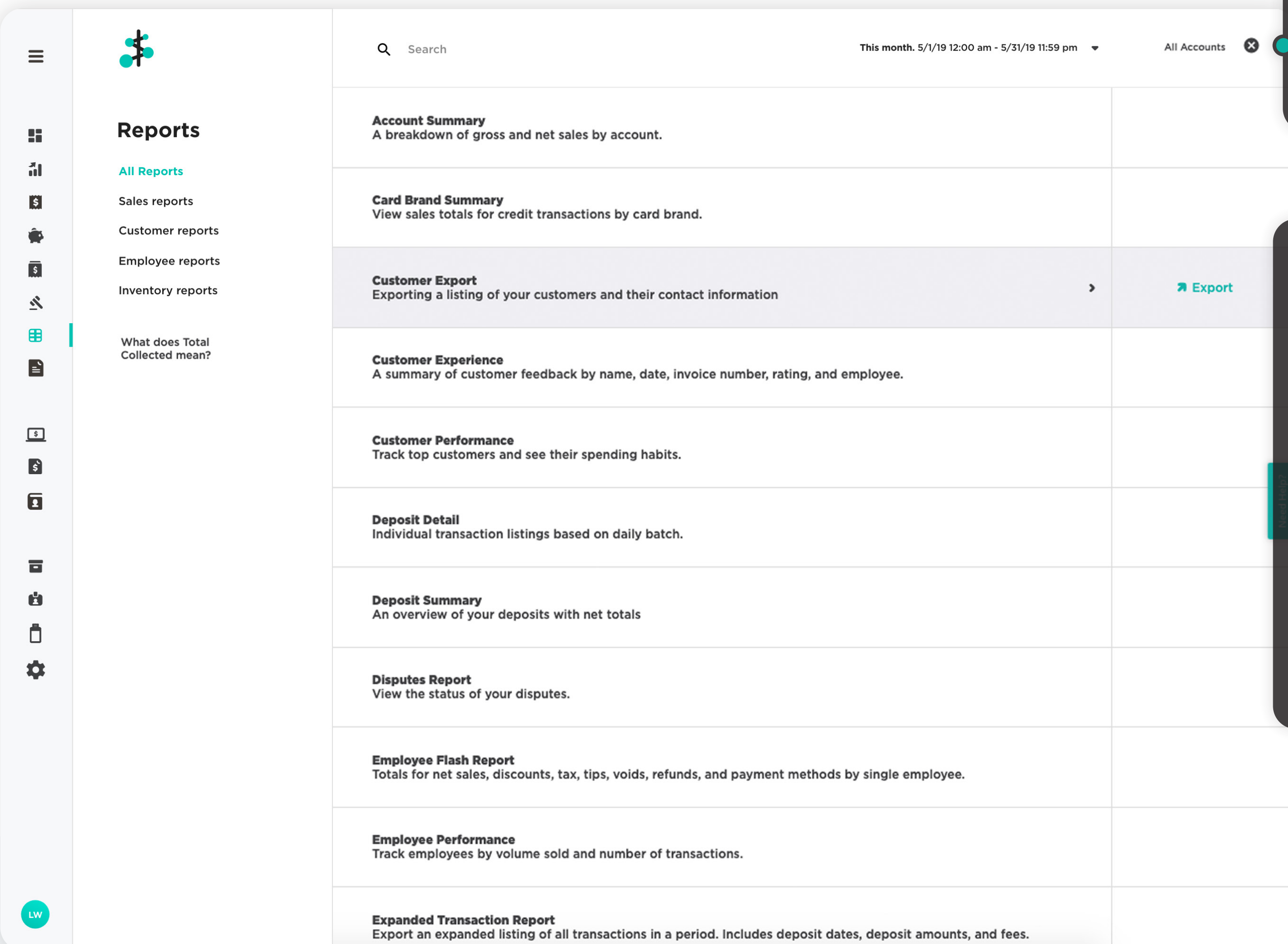
View and manage chargebacks, and dispute the ones you believe are not valid.



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.



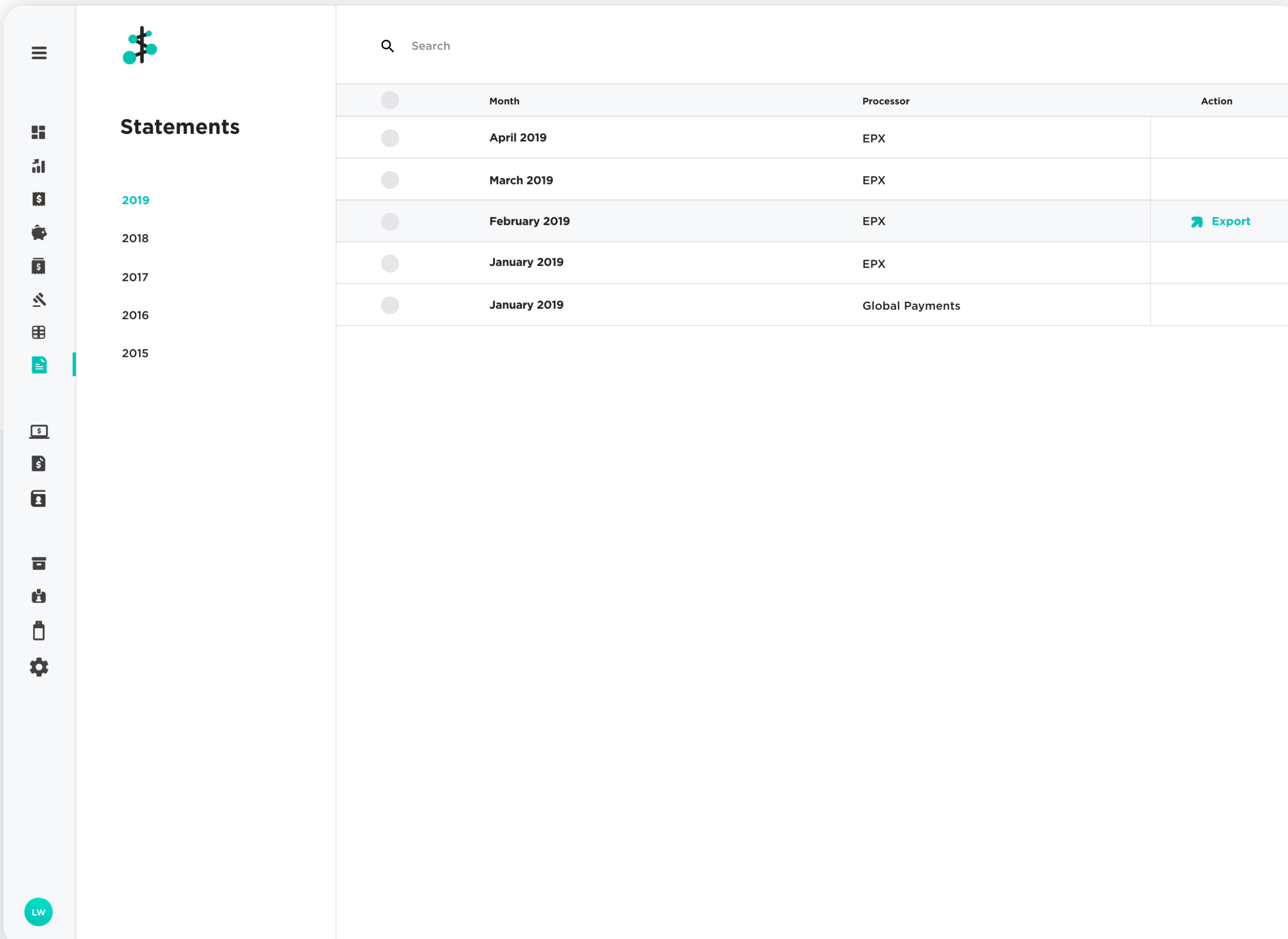
Commonly used reports:

- Account Summary
- Flash
- Expanded Transactions
- Batch
- Deposit Detail

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

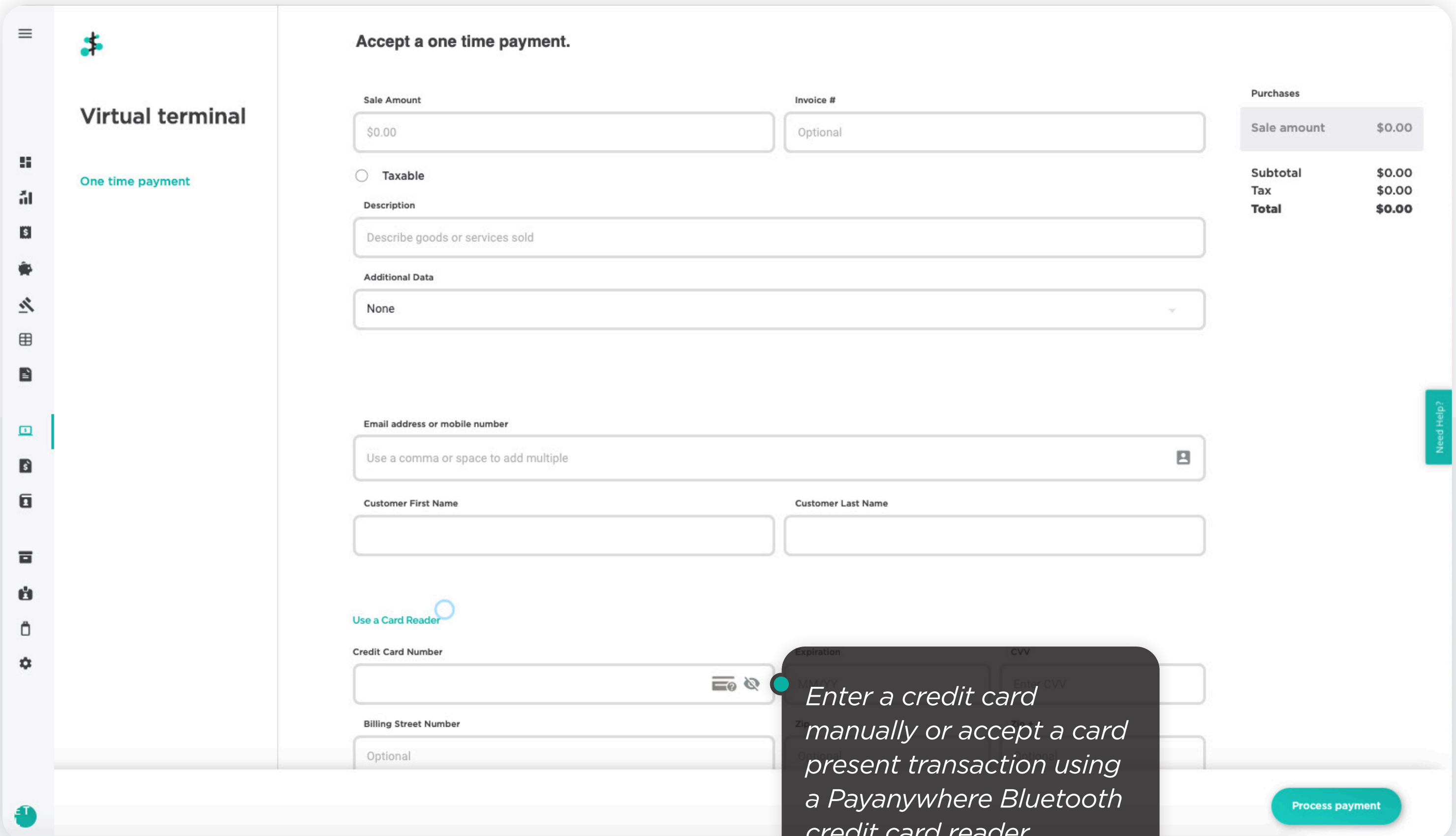
Statements

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



Virtual Terminal

Accept payments using the Virtual Terminal feature.
Standard processing rates apply.



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

Invoices

Manage and monitor your one time and recurring invoices here.

1

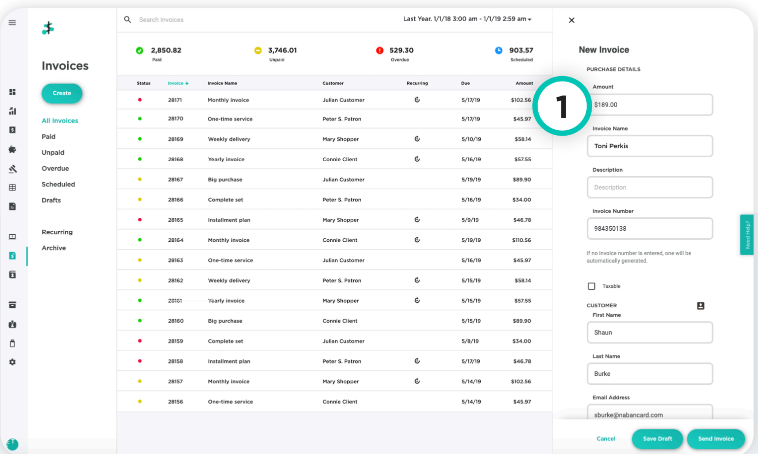
Create invoice.

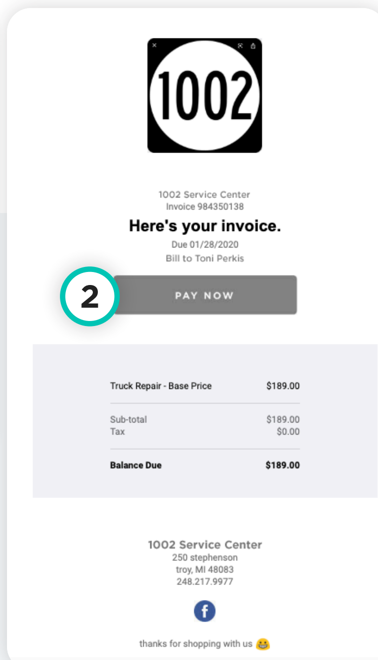
2

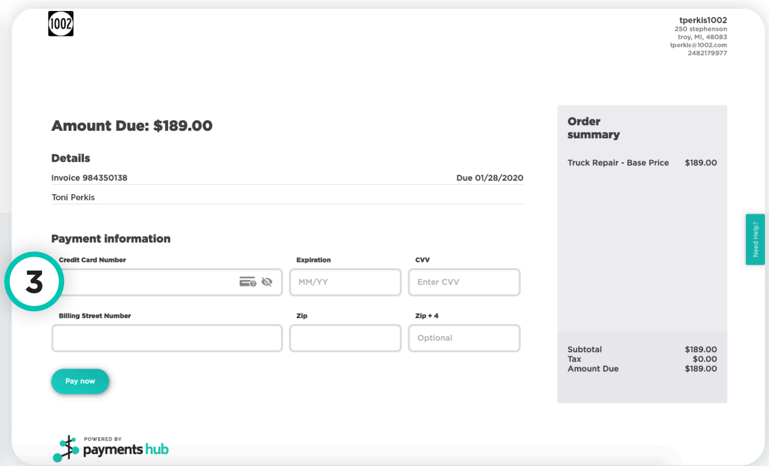
Your customer receives the invoice via email with a link to a secure payment page.

3

Your customer pays their invoice by entering their card information on the payment page.

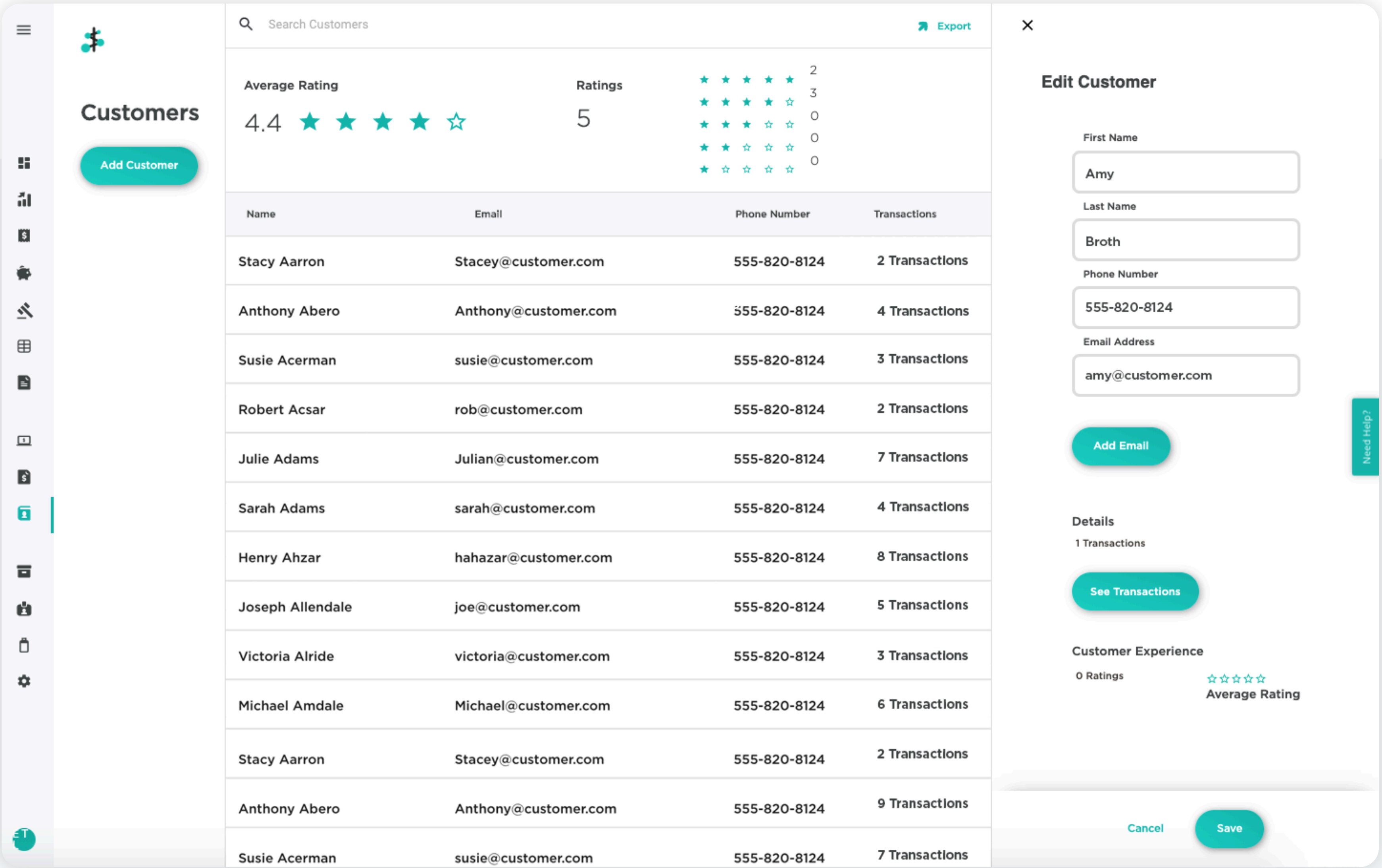






Customers

View and edit your customer directory with contact information, associated transactions, and how they rated their experience. Export your customer list as a .csv file.



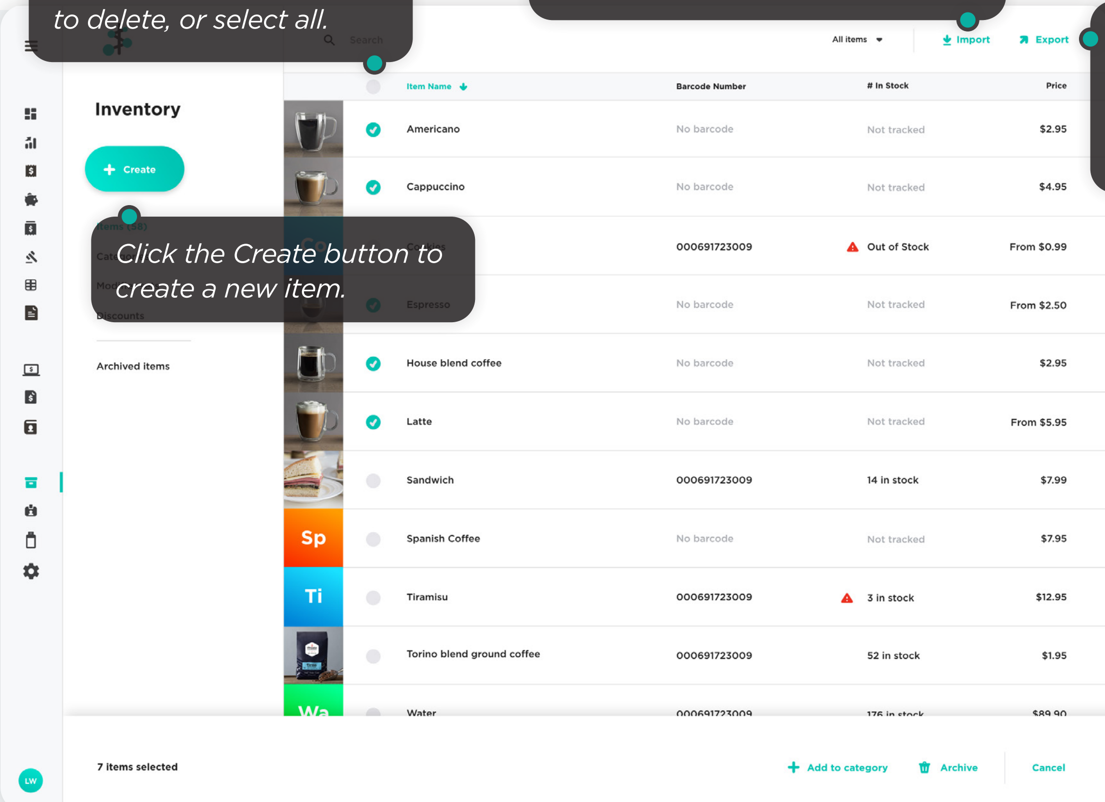
Inventory

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

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

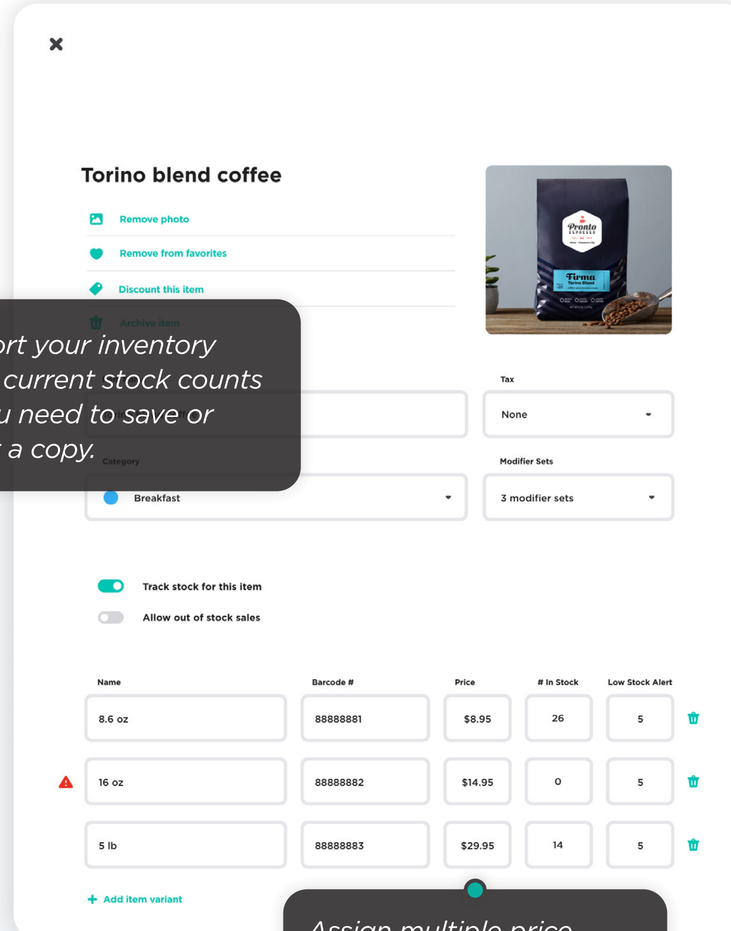
Skipping this step may case an error during item import. Assign modifiers to items after you've imported.

To delete your inventory, select the items you wish to delete, or select all.



Click the Create button to create a new item.

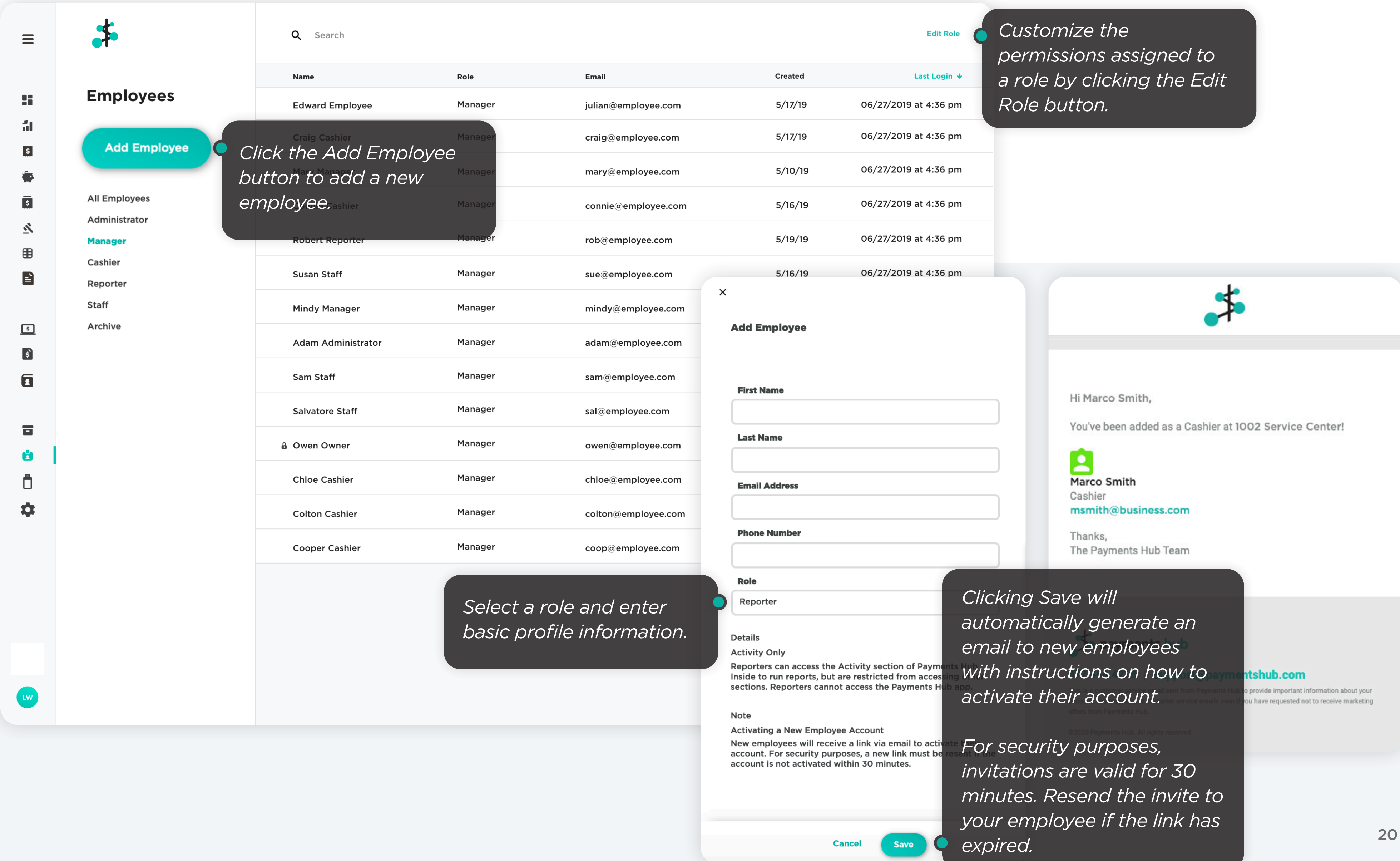
Export your inventory with current stock counts if you need to save or print a copy.



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

Employees

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

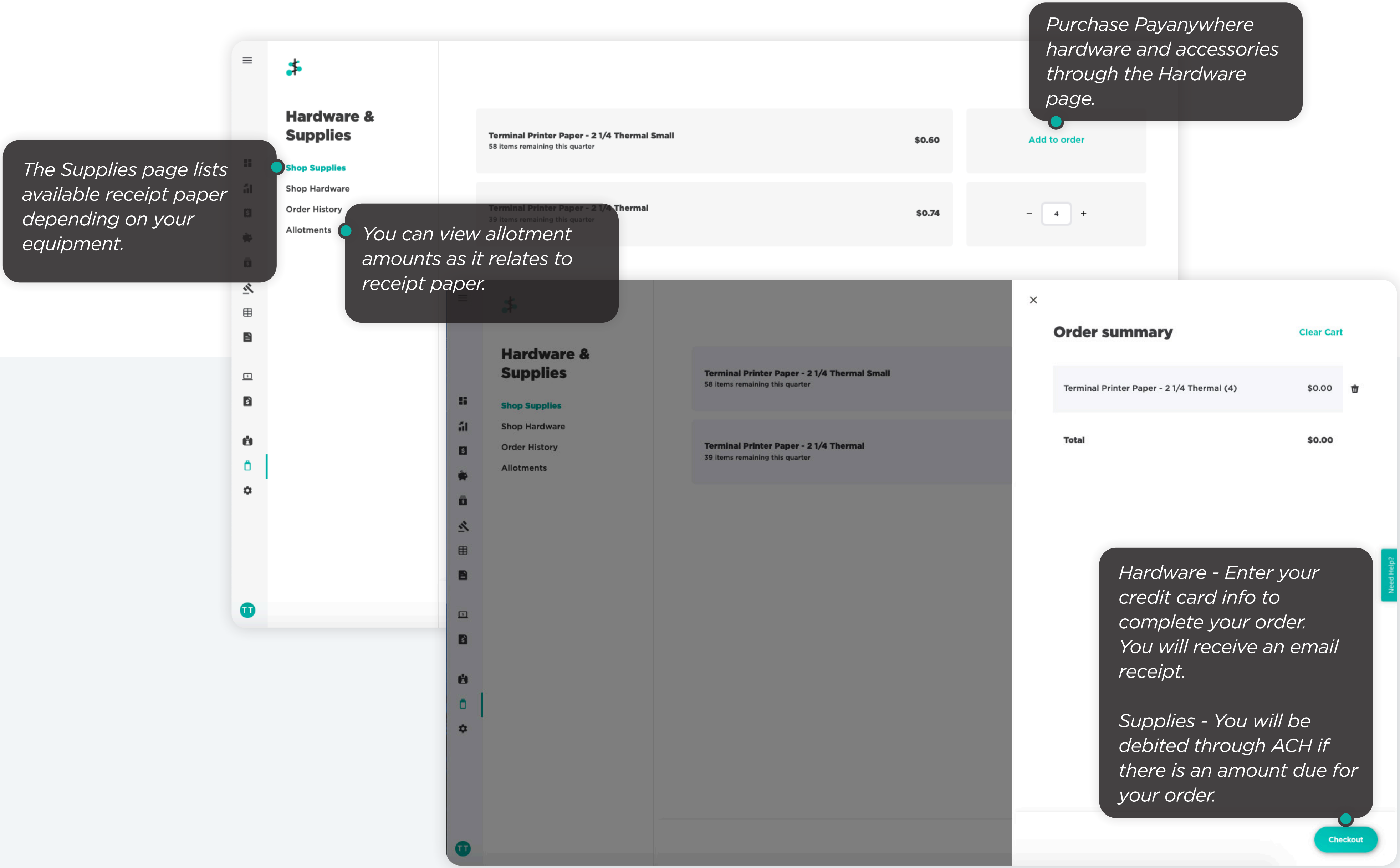


Employees Roles

	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.	✓		
Staff Employees that need to clock in and out using Homebase, but don't accept payments, handle inventory, or view reports.			

Hardware & Supplies

Order additional hardware, accessories, and supplies.



Business Settings

View and manage your Business Settings.

Set up your receipt with an image, custom message, and links to your social media profiles.

View and edit your business information.

You will need to answer security questions in order to validate your identity before you can make changes.

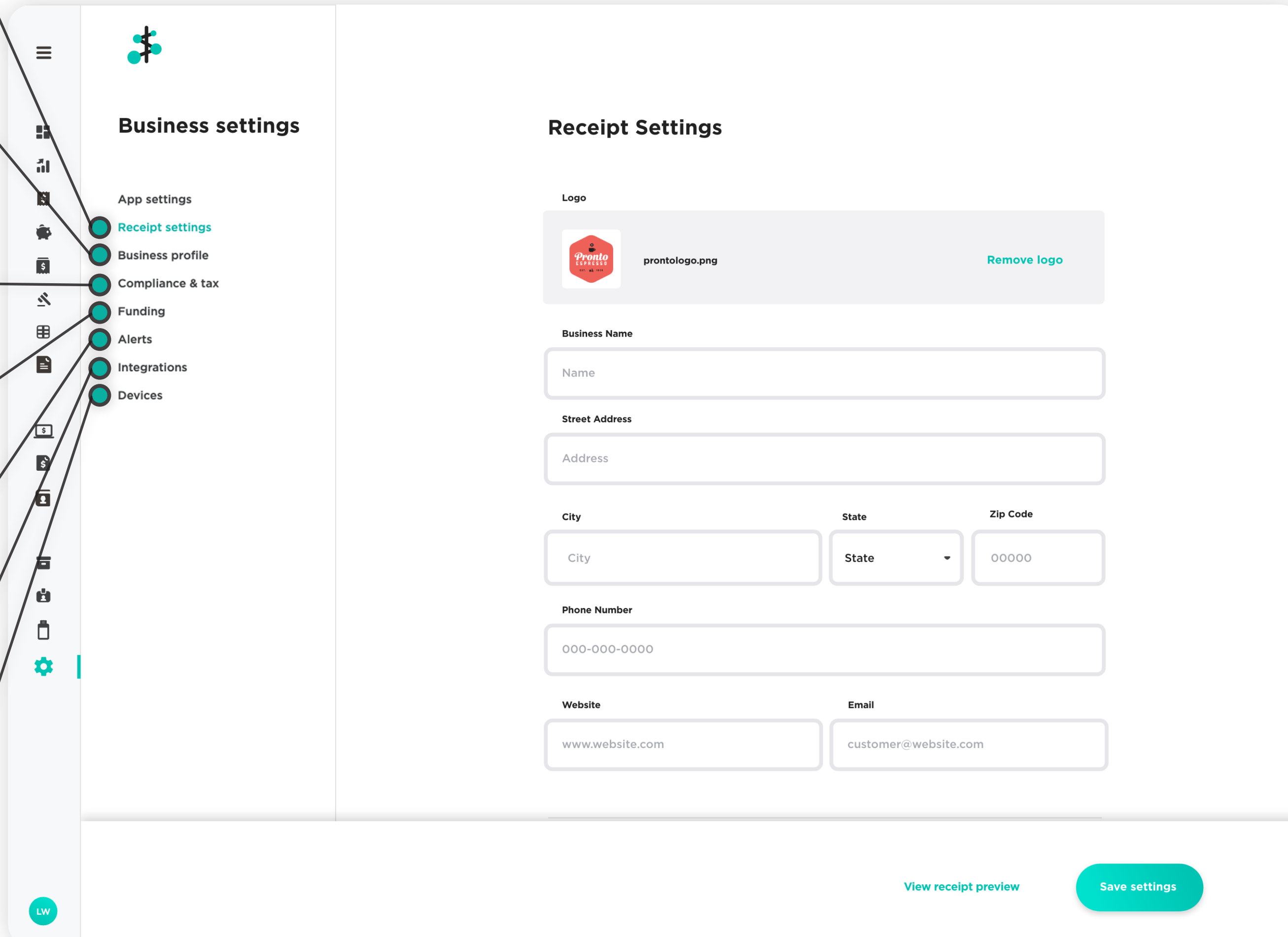
See relevant tax information, including TIN mismatch status and download your 1099K.

Make changes to your funding settings and bank information.

Use basic and custom email alerts to keep an eye on your business activity.

Integrate with third party services such as Homebase and QuickBooks Online.

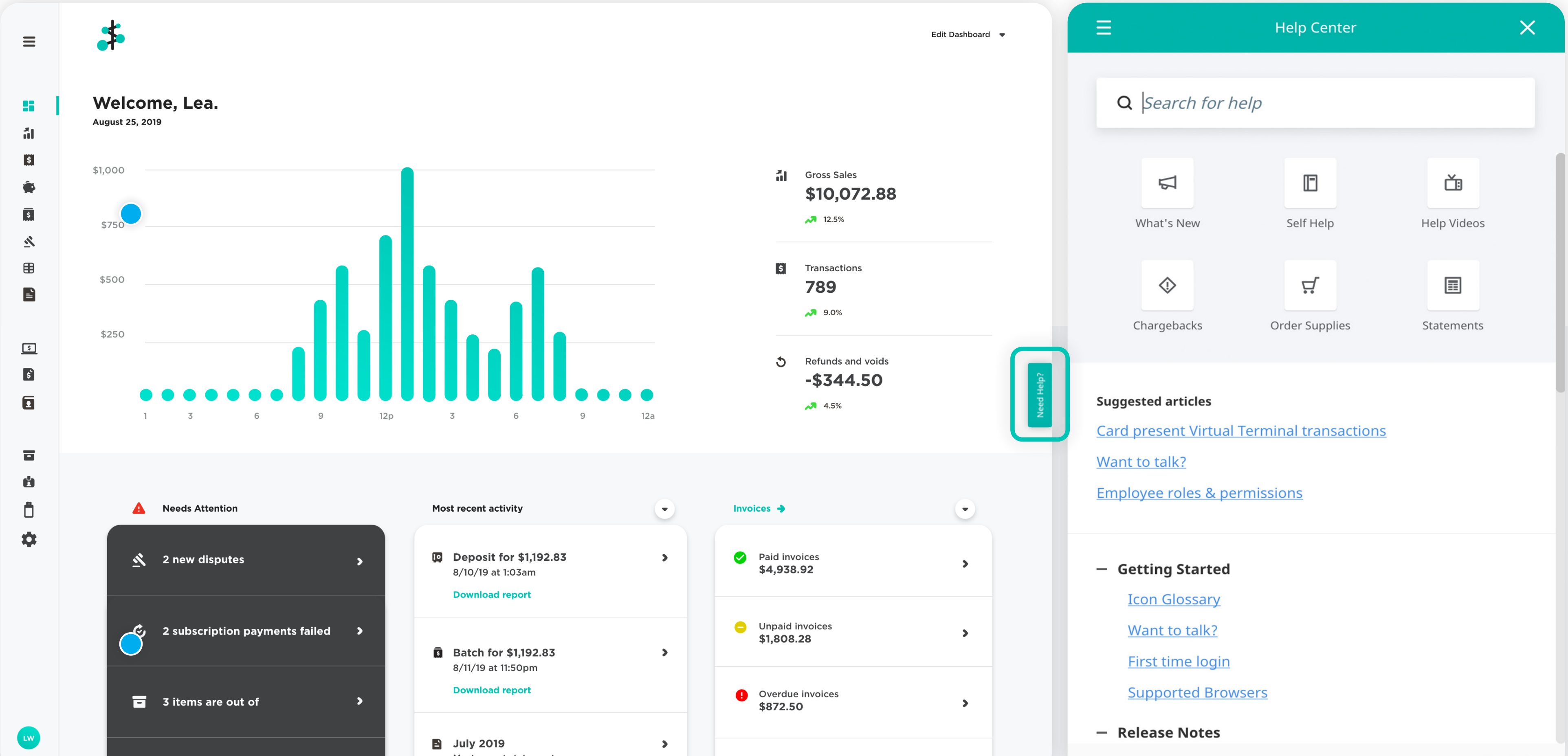
View devices that are running the Payanywhere app.



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.

https://vimeo.com/user47072975



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