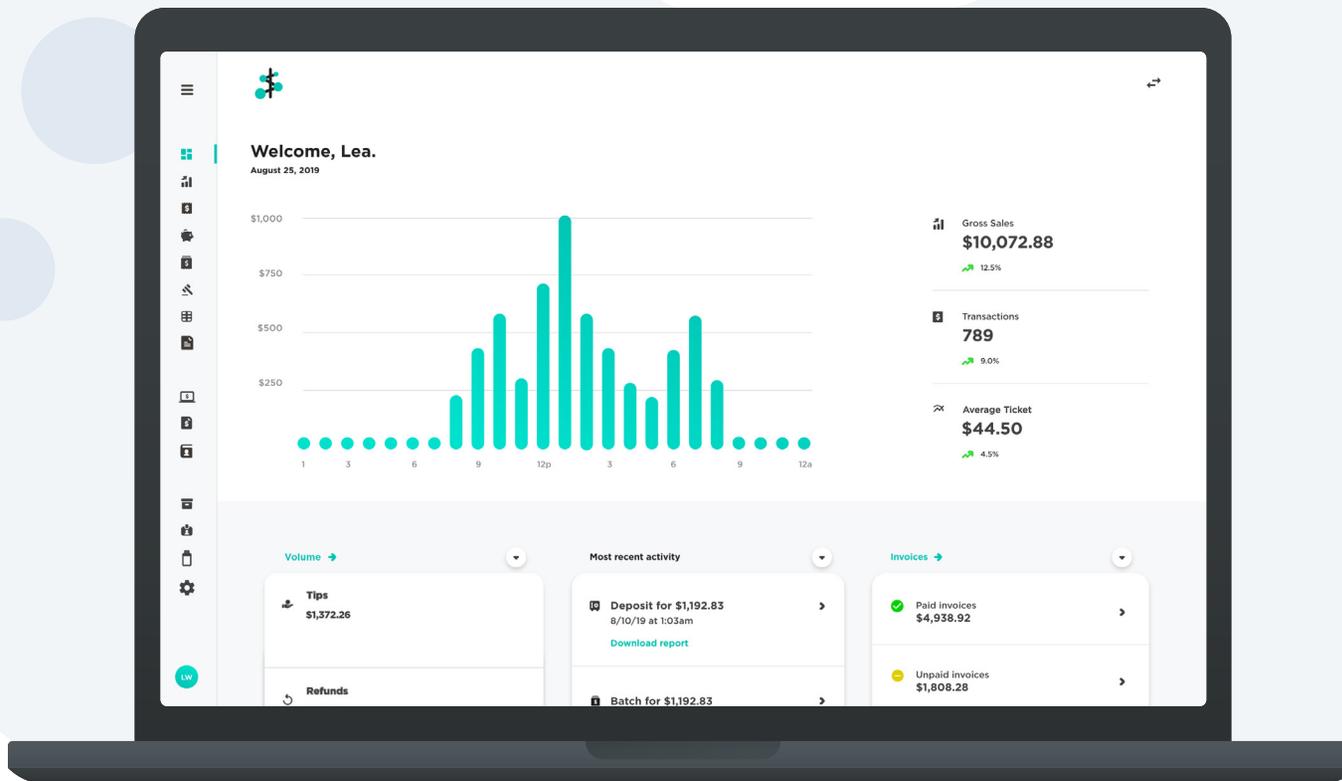




Your guide to your business command center.



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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.

The collage displays five key features of the Payments Hub interface:

- Dashboard:** A central overview showing sales performance with a bar chart, a 'Welcome, Lea' greeting, and summary cards for tips (\$3,732.26), refunds (\$432.81), and invoices (\$337.42). It also includes sections for 'Most recent activity', 'Inventory', and 'Customers'.
- Sales Overview:** A detailed view of sales data, including a bar chart comparing current and previous periods, and a table listing individual customer transactions with details like name, change, status, and total value.
- User Settings:** A configuration page for an employee named Edward, allowing for updates to two-factor authentication, email address, password, and personal profile information.
- Virtual Terminal:** A secure interface for processing payments, featuring fields for customer information and a 'Processing payment...' status indicator.
- Purchase Summary:** A breakdown of a recent purchase, showing the product (Product delivery) for \$45.00, subtotal, tax, and total amount.



	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.

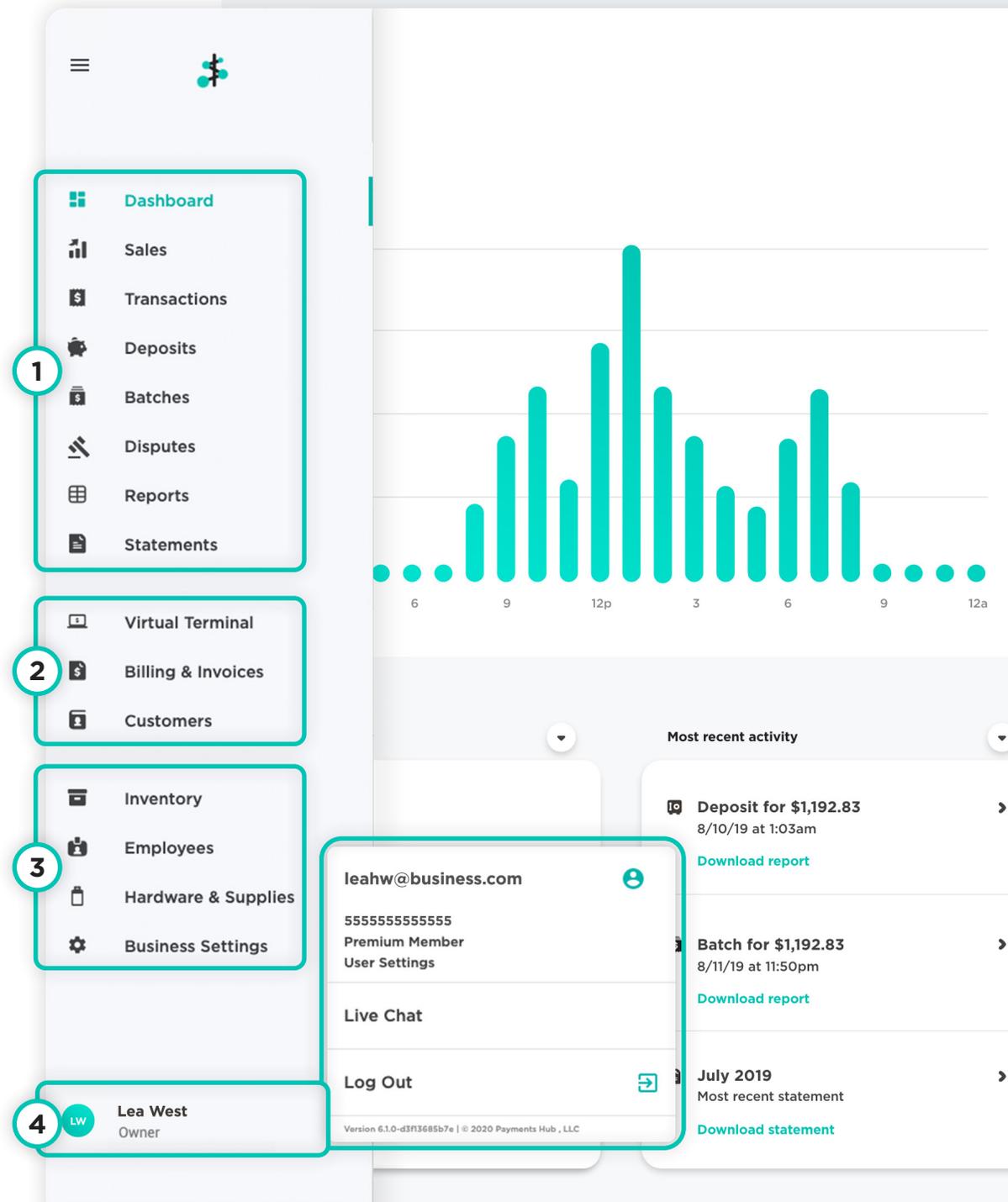
New merchants are automatically enrolled in a 60-day free trial of the Premium plan. After the trial, you will be charged \$14.95/mo, unless you choose to downgrade to the Free plan.

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.

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 mobile application interface for transactions. On the left is a vertical navigation menu with icons for home, transactions, credit sales, debit sales, cash sales, pre-auth, virtual terminal, invoices, refunds, voids, and settings. The main content area is titled 'Transactions' and shows a list of 20 transactions. At the top of the main area is a search bar, a date range selector (set to 'This month, 5/1/19 12:00 am - 5/31/19 11:59 pm'), and an 'Export' button. The table has columns for Invoice, Date, Transaction Types, Sold by, Customer, and Amount. A callout points to the left panel, another to the search and date range area, and a third to the column headers.

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.

User settings.

- ✓ Enable two factor authentication
- @ Update email
- 🔑 Update password
- ✏️ Edit personal profile

Enable two factor authentication for added account security.

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

Username
leahw@business.com

Password

Plan

Premium plan
\$14.95 per month. Enrolled August 16, 2018. [Opt out of Premium plan](#)

Name
Leah Whiteside

Date of Birth
xx/xx/xxxx

SSN
* * * * *

Hide sensitive data
Yes

Address
XXXXXXXXXX

Suite/Apt.
XXXXXXXXXX

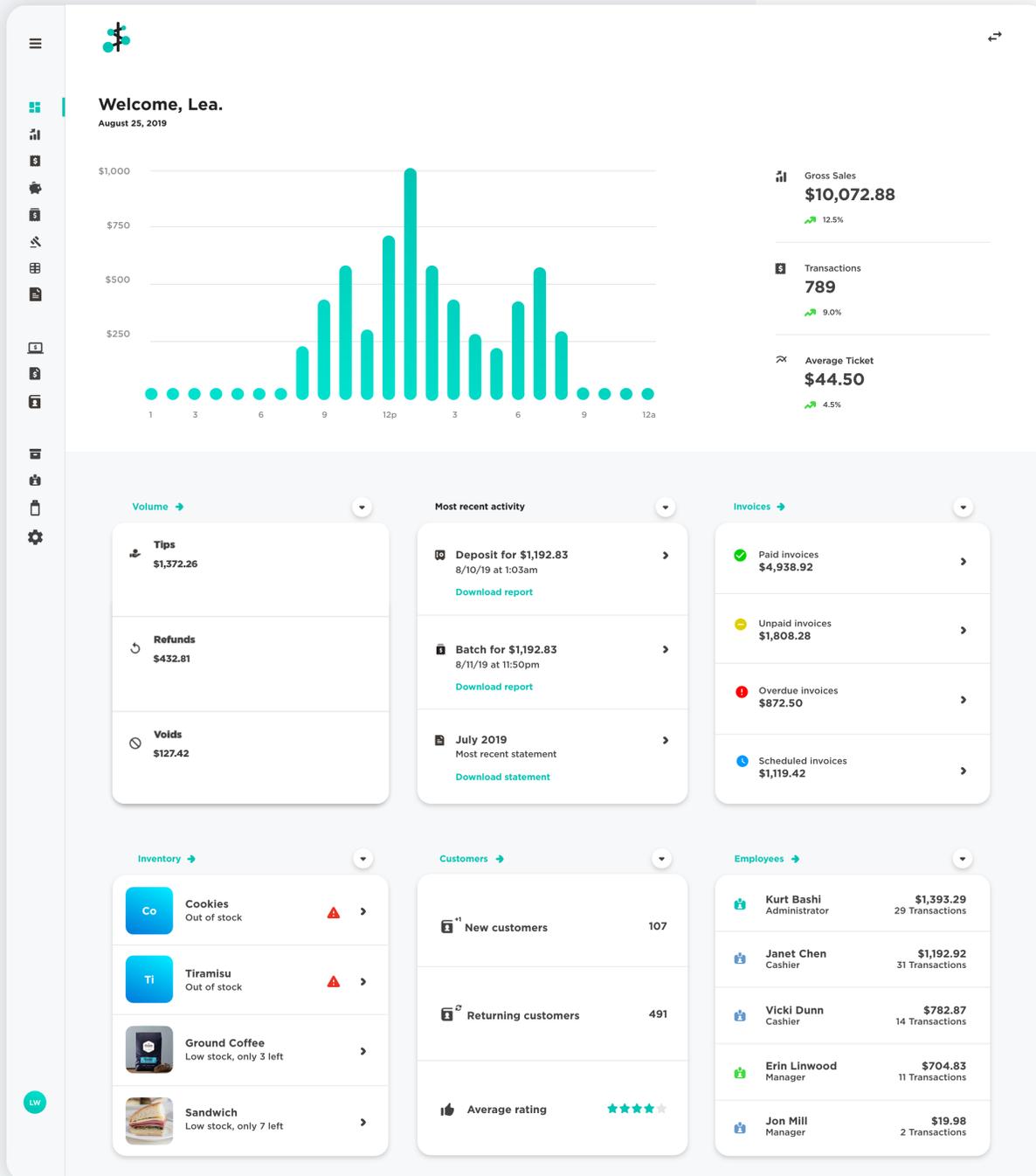
City
XXXXXXX

State
XX

Zip
XXXXXX

Phone Number
(XXX) XXX-XXXX

M.G.

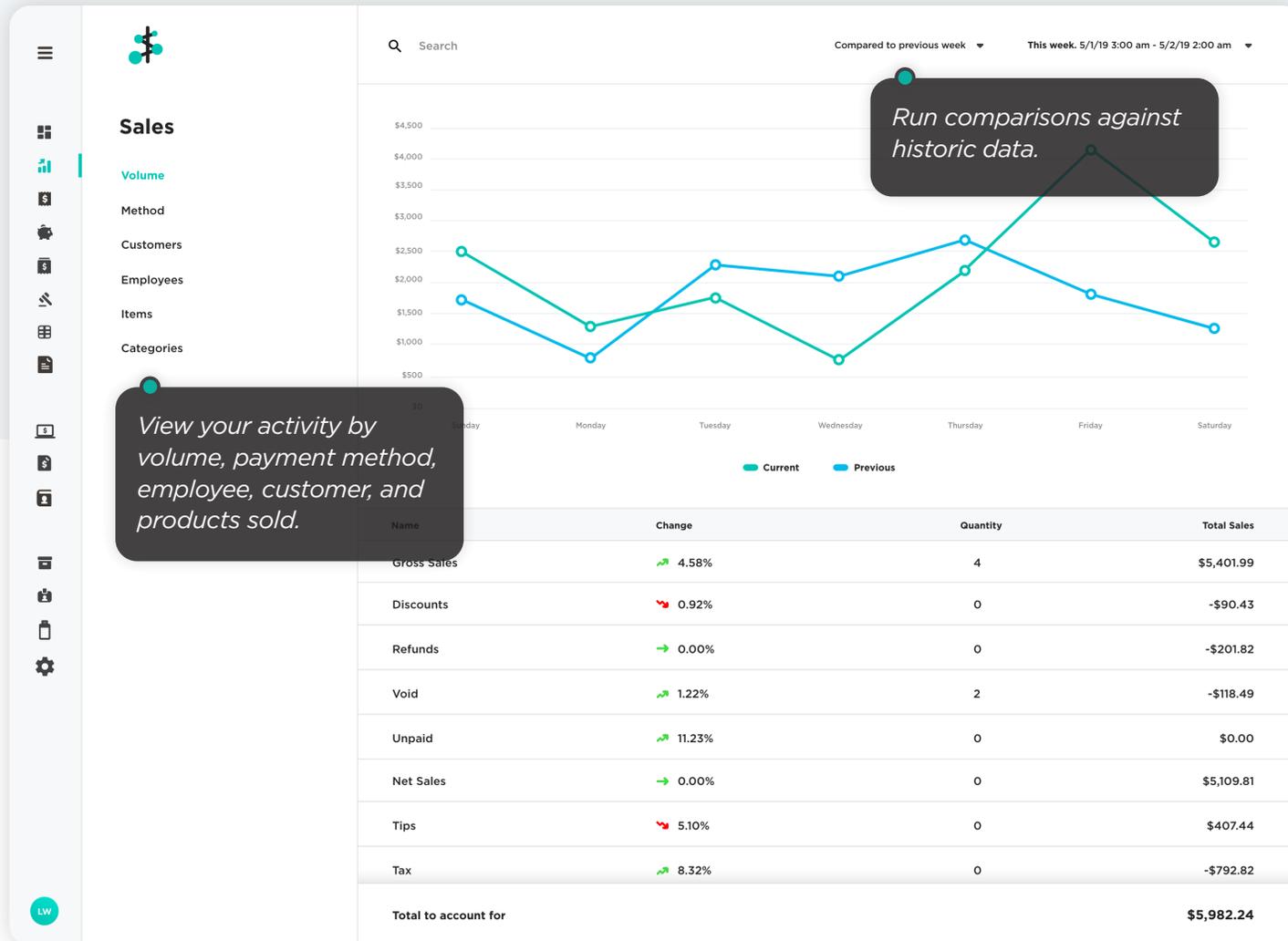


Dashboard

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 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 containing filters like 'All transactions (1,023)', 'All Sales', 'Credit Sales', 'Debit Sales', 'Cash Sales', 'Pre-auth', 'Virtual Terminal', 'Invoices', 'Refunds', and 'Voids'. The main area shows a table of transactions for the month of May 2019. A callout box highlights that clicking on an individual transaction leads to a detailed view. This view shows a '\$102.56 credit sale' on May 10, 2019, at 8:58 am. The details include transaction information (Invoice #28171, MID 38807389234745, Front counter terminal, EMV chip card, Visa 5901, Authorization #02829, Authorized amount \$355.01), employee information (Victoria L. Cashier), and customer information (Sonia M. Customer, Sonia.m@customer.com). The items purchased are listed as a Suitcase (\$195.00), Backpack (1) Large Two tone (\$100.00), and Passport cover (2) (\$40.00). The summary shows a Subtotal of \$335.00, Tax of \$20.00, and a Total of \$355.00.

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
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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

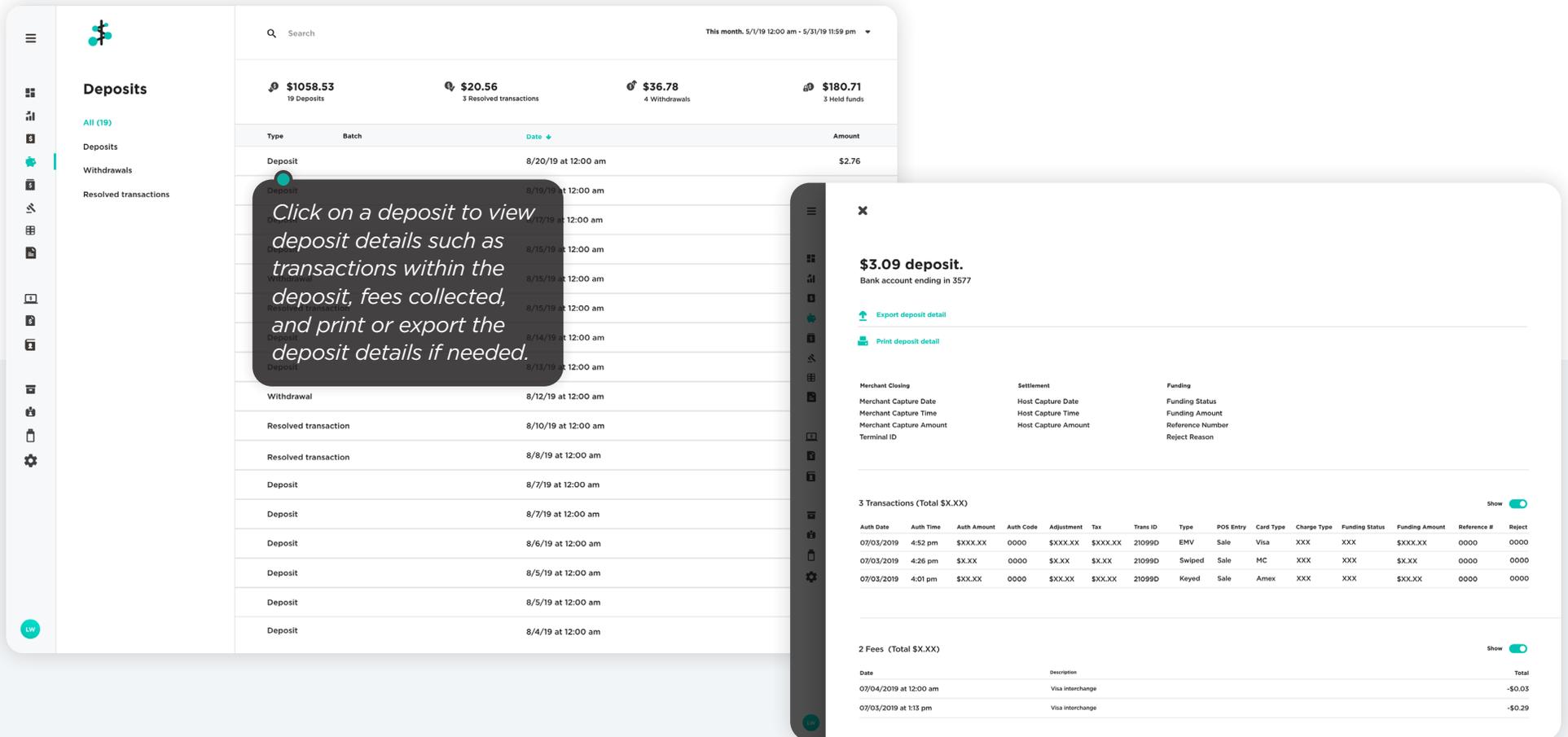
Where are today's transactions? Transactions will display after you have batched. Open Batch is a list of live credit card authorizations that have not yet settled and does not include refunds, cash, and virtual terminal transactions.

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.



The dashboard shows a list of deposits with a total of \$1058.53 from 19 deposits. A callout box highlights that clicking on a deposit allows users to view details such as transactions within the deposit, fees collected, and the ability to print or export details.

The detailed view for a \$3.09 deposit shows the following merchant closing information:

Merchant Closing	Settlement	Funding
Merchant Capture Date	Host Capture Date	Funding Status
Merchant Capture Time	Host Capture Time	Funding Amount
Merchant Capture Amount	Host Capture Amount	Reference Number
Terminal ID		Reject Reason

Below this, there are sections for 3 Transactions (Total \$X.XX) and 2 Fees (Total \$X.XX).

Auth Date	Auth Time	Auth Amount	Auth Code	Adjustment	Tax	Trans ID	Type	POS Entry	Card Type	Charge Type	Funding Status	Funding Amount	Reference #	Reject
07/03/2019	4:52 pm	\$XXX.XX	0000	\$XXX.XX	\$XXX.XX	21099D	EMV	Sale	Visa	XXX	XXX	\$XXX.XX	0000	0000
07/03/2019	4:26 pm	\$X.XX	0000	\$X.XX	\$X.XX	21099D	Swiped	Sale	MC	XXX	XXX	\$X.XX	0000	0000
07/03/2019	4:01 pm	\$XX.XX	0000	\$XX.XX	\$XX.XX	21099D	Keyed	Sale	Amex	XXX	XXX	\$XX.XX	0000	0000

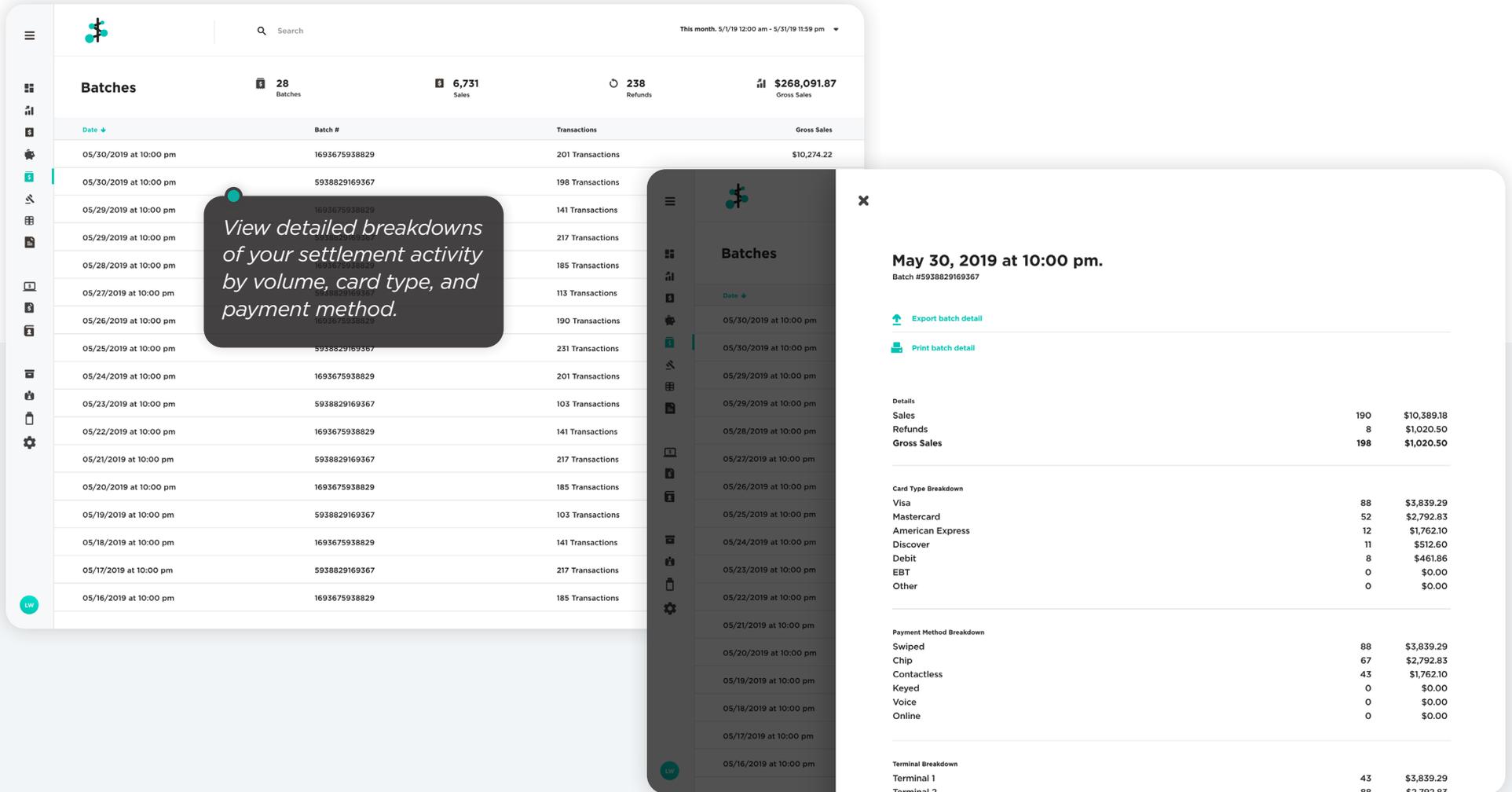
Date	Description	Total
07/04/2019 at 12:00 am	Visa Interchange	-\$0.03
07/03/2019 at 1:13 pm	Visa Interchange	-\$0.29

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.



Batches 28 Batches 6,731 Sales 238 Refunds \$268,091.87 Gross Sales

Date	Batch #	Transactions	Gross Sales
05/30/2019 at 10:00 pm	1693675938829	201 Transactions	\$10,274.22
05/30/2019 at 10:00 pm	5938829169367	198 Transactions	
05/29/2019 at 10:00 pm	1693675938829	141 Transactions	
05/29/2019 at 10:00 pm		217 Transactions	
05/28/2019 at 10:00 pm		185 Transactions	
05/27/2019 at 10:00 pm		113 Transactions	
05/26/2019 at 10:00 pm		190 Transactions	
05/25/2019 at 10:00 pm	5938829169367	231 Transactions	
05/24/2019 at 10:00 pm	1693675938829	201 Transactions	
05/23/2019 at 10:00 pm	5938829169367	103 Transactions	
05/22/2019 at 10:00 pm	1693675938829	141 Transactions	
05/21/2019 at 10:00 pm	5938829169367	217 Transactions	
05/20/2019 at 10:00 pm	1693675938829	185 Transactions	
05/19/2019 at 10:00 pm	5938829169367	103 Transactions	
05/18/2019 at 10:00 pm	1693675938829	141 Transactions	
05/17/2019 at 10:00 pm	5938829169367	217 Transactions	
05/16/2019 at 10:00 pm	1693675938829	185 Transactions	

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

May 30, 2019 at 10:00 pm.

Batch #5938829169367

[Export batch detail](#)

[Print batch detail](#)

Details		
Sales	190	\$10,389.18
Refunds	8	\$1,020.50
Gross Sales	198	\$1,020.50

Card Type Breakdown		
Visa	88	\$3,839.29
Mastercard	52	\$2,792.83
American Express	12	\$1,762.10
Discover	11	\$512.60
Debit	8	\$461.86
EBT	0	\$0.00
Other	0	\$0.00

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

Terminal Breakdown		
Terminal 1	43	\$3,839.29
Terminal 2	88	\$2,792.83

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.

The interface is divided into three main sections:

- Left Sidebar:** Contains navigation icons and a 'Disputes' section with a sub-menu: 'All (6)', 'Action required', 'Under review', 'Closed', and 'See how it works'.
- Center Panel:** A table titled 'Search Disputes' with columns: Due date, Transaction date, MID, Status, Card, Case type, Reason code, and Dispute amount. A callout box points to the first row (Feb 08, 2020) with the text: 'Click on a dispute in order to view dispute details, such as the transaction details, chargeback notice, and the due date for a response.'
- Right Panel:** A detailed view of a chargeback for '1002 Service Center *5555'. It includes: 'Notice Date Jan 26, 2020', 'Action required' (with a red dot icon) and a warning: 'A response is required by Feb 08, 2020 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: XXXXXXXXXXXXXXXXXXXX, ARN: XXXXXXXXXXXXXXXXXXXX, MID: 12345678910121', 'Original transaction: Transaction amount \$49.95, Invoice on Jan 02, 2020, Invoice: 35613135', 'Associated notices: Chargeback-2019-02-24', and 'Associated comments'. At the bottom, there are 'Accept' and 'Rebut' buttons. A callout box points to the 'Rebut' button with the text: 'Accept the dispute if it is valid, otherwise upload supporting documentation and comments when you rebut. File limit is 5 mb.'

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.

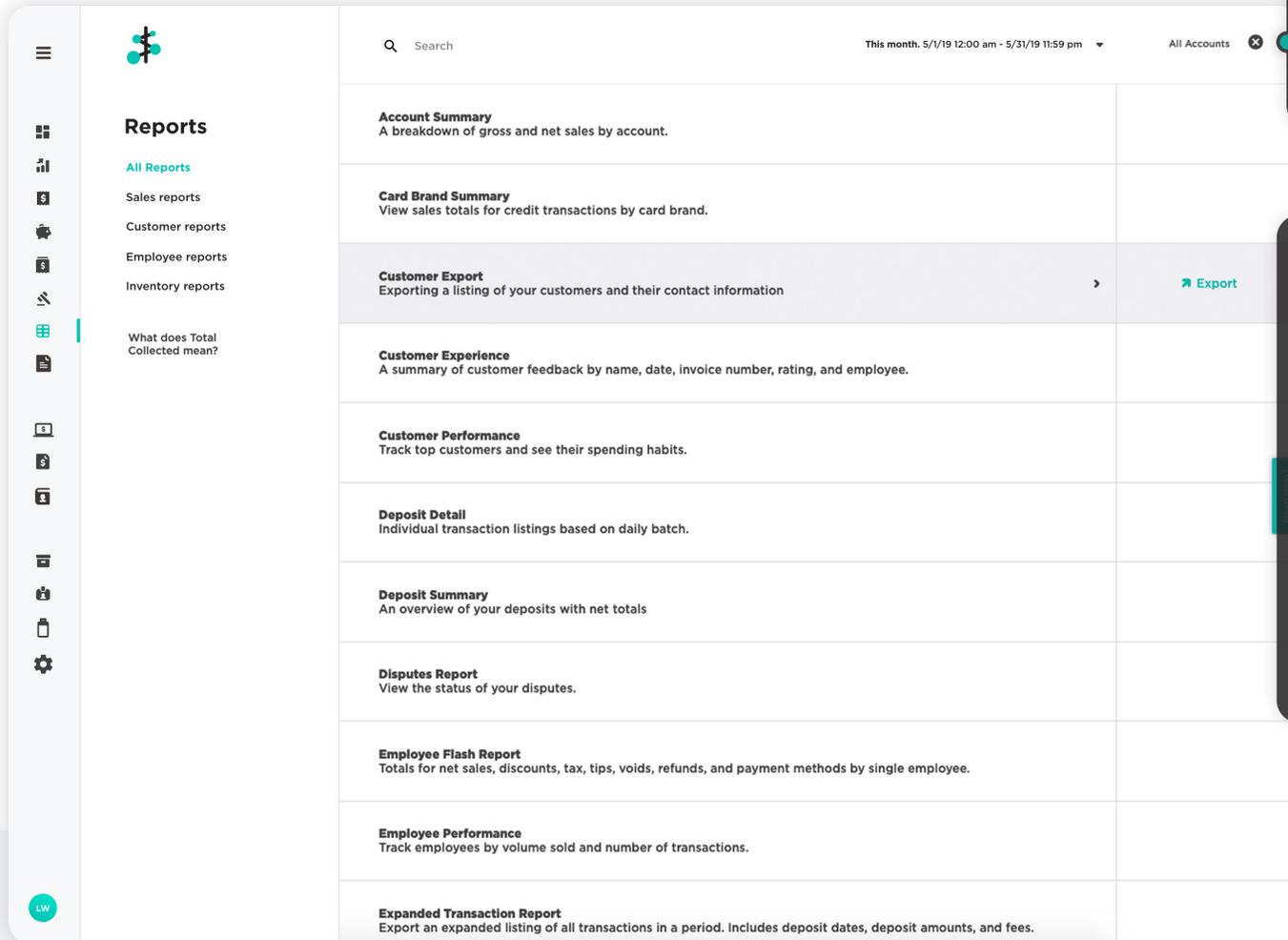
Reports

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:

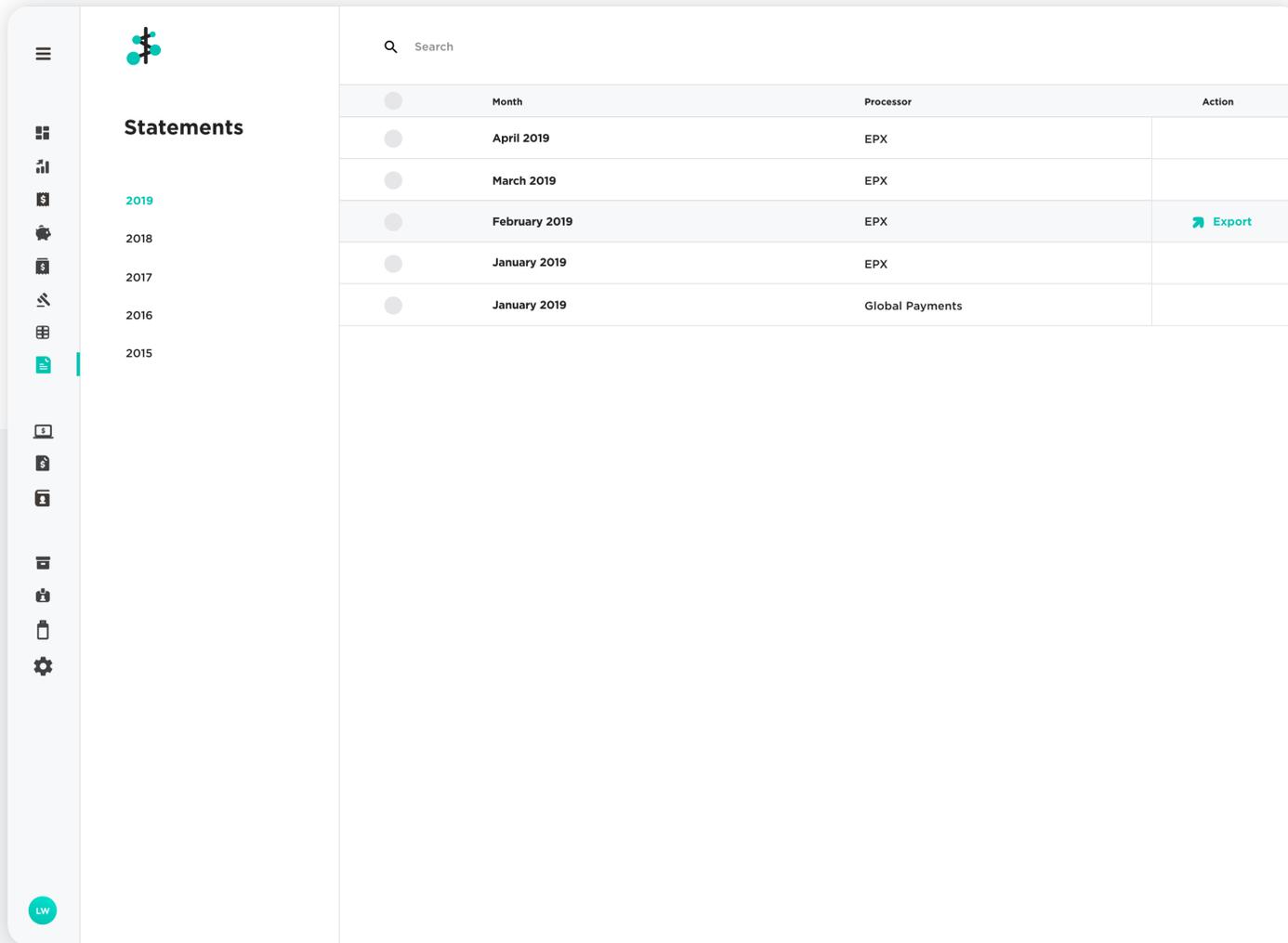
- ✓ Account Summary
- ✓ Flash
- ✓ Expanded Transactions
- ✓ Batch
- ✓ Deposit Detail



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.

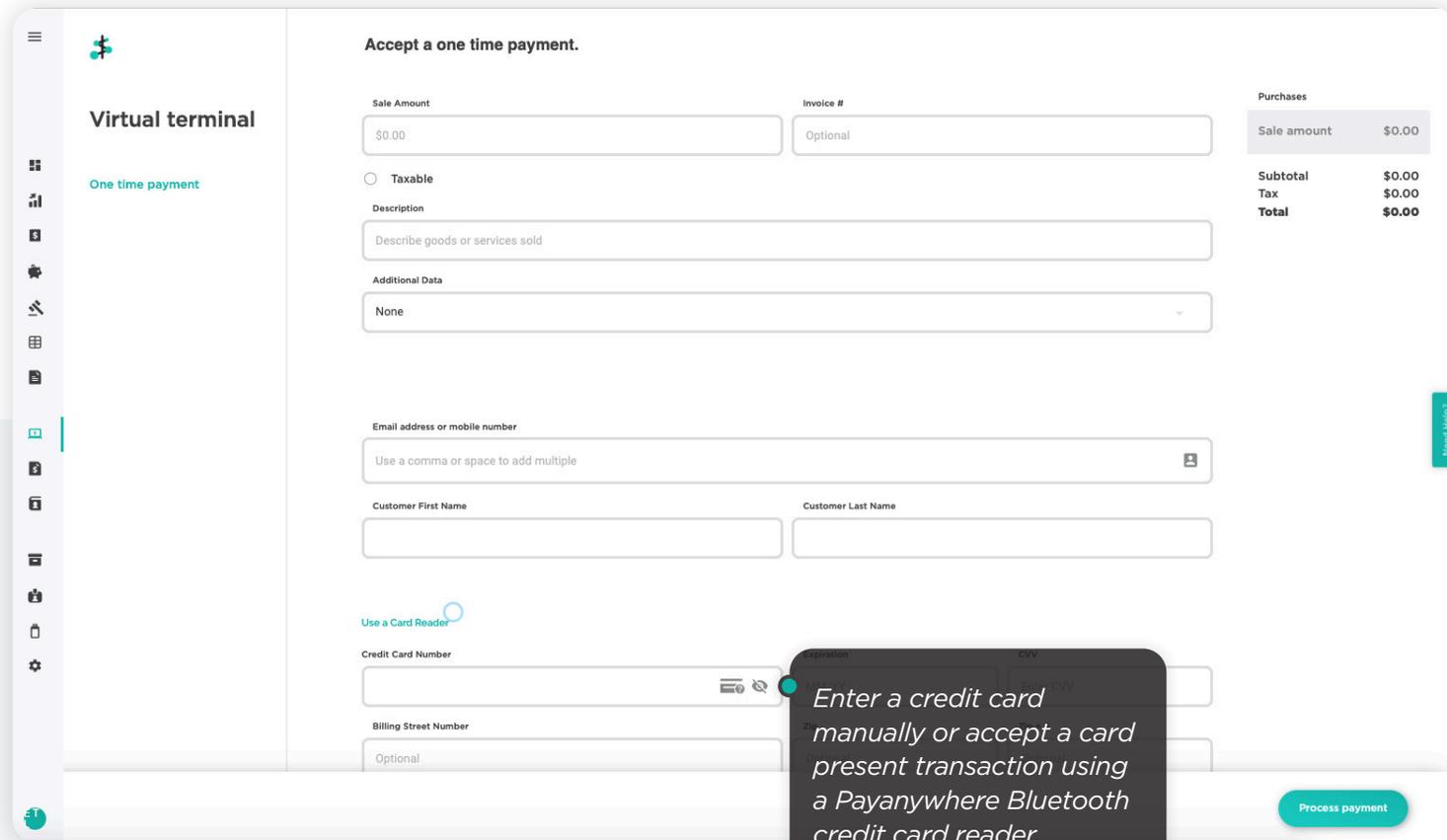


The screenshot displays a web application interface for viewing and exporting statements. On the left is a vertical sidebar with various navigation icons, including a menu icon at the top and a user profile icon at the bottom labeled 'LW'. The main content area is divided into three sections: a search bar at the top, a table of statements, and a large empty space below the table. The table has three columns: 'Month', 'Processor', and 'Action'. The 'February 2019' row is highlighted in light blue and includes an 'Export' button with a download icon. The 'January 2019' row with 'Global Payments' as the processor is also visible.

Month	Processor	Action
April 2019	EPX	
March 2019	EPX	
February 2019	EPX	Export
January 2019	EPX	
January 2019	Global Payments	

Virtual Terminal

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



Accept a one time payment.

Sale Amount **Invoice #**

Taxable

Description

Additional Data

Email address or mobile number

Customer First Name **Customer Last Name**

[Use a Card Reader](#)

Credit Card Number

Billing Street Number

Purchases

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

Process payment

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

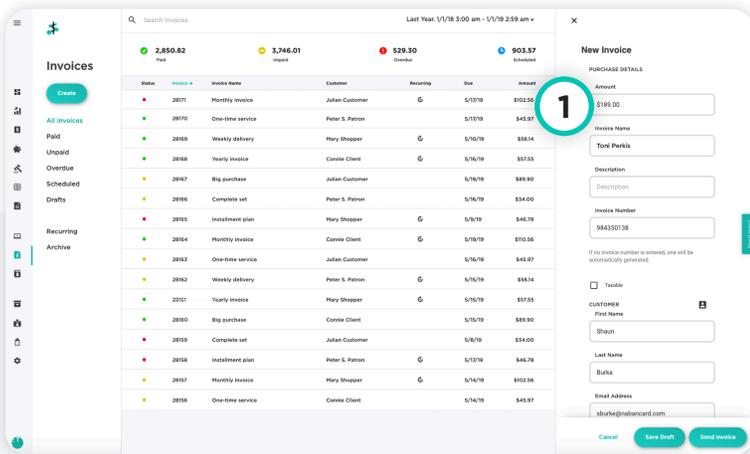
Create invoice.

2

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

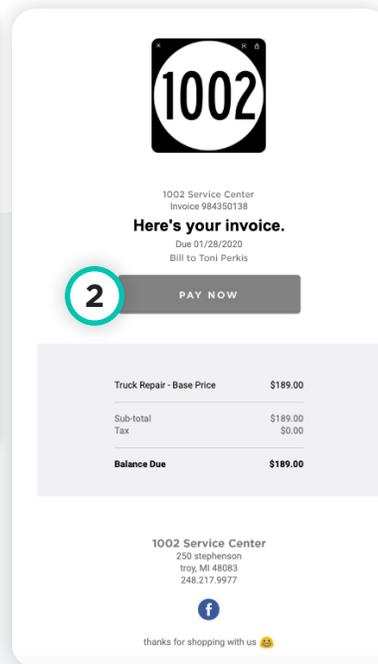
3

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

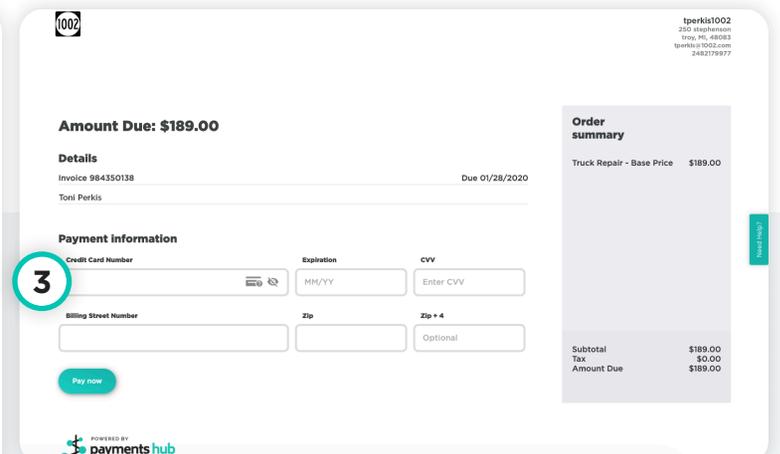


The screenshot shows the 'Invoices' management interface. On the left is a sidebar with navigation options: Create, All Invoices, Paid, Unpaid, Overdue, Scheduled, Drafts, Recurring, and Archive. The main area displays a table of invoices with columns for Status, Invoice #, Invoice Name, Customer, Recurring, Due, and Amount. A 'New Invoice' form is open on the right, with a '1' in a circle highlighting the 'Invoice Name' field.

Status	Invoice #	Invoice Name	Customer	Recurring	Due	Amount
2,850.82 Paid	2871	Monthly invoice	Julian Customer	☑	5/17/19	\$102.50
3,746.01 Unpaid	2870	One-time service	Peter S. Paton	☑	5/17/19	\$45.87
529.30 Overdue	2869	Weekly delivery	Mary Shopper	☑	5/16/19	\$38.34
903.57 Scheduled	2868	Yearly service	Connie Client	☑	5/16/19	\$57.51
	2867	Big purchase	Julian Customer	☑	5/16/19	\$89.90
	2866	Complete set	Peter S. Paton	☑	5/16/19	\$34.00
	2865	Installation plan	Mary Shopper	☑	5/16/19	\$45.78
	2864	Monthly invoice	Connie Client	☑	5/16/19	\$102.56
	2863	One-time service	Julian Customer	☑	5/16/19	\$45.87
	2862	Weekly delivery	Peter S. Paton	☑	5/16/19	\$38.34
	2861	Yearly invoice	Mary Shopper	☑	5/16/19	\$57.55
	2860	Big purchase	Connie Client	☑	5/16/19	\$89.90
	2859	Complete set	Julian Customer	☑	5/16/19	\$34.00
	2858	Installation plan	Peter S. Paton	☑	5/17/19	\$45.78
	2857	Monthly invoice	Mary Shopper	☑	5/16/19	\$102.56
	2856	One-time service	Connie Client	☑	5/16/19	\$45.87



The screenshot shows an email notification for a new invoice. It features the 1002 logo, the text 'Here's your invoice.', and a 'PAY NOW' button. A '2' in a circle highlights the button. Below the button is a summary of the invoice: Truck Repair - Base Price \$189.00, Sub-total \$189.00, Tax \$0.00, and Balance Due \$189.00. The sender information is 1002 Service Center, 250 Stephenson, Troy, MI 48063, 248.217.9977.



The screenshot shows the payment page. It displays the amount due (\$189.00), invoice details (Invoice 984350138, Due 01/28/2020), and payment information fields (Credit Card Number, Expiration, CVV, Billing Street Number, Zip, Zip + 4). A '3' in a circle highlights the 'PAY NOW' button. An 'Order summary' box on the right shows: Truck Repair - Base Price \$189.00, Subtotal \$189.00, Tax \$0.00, and Amount Due \$189.00. The page is powered by Payments Hub.

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.

































Search Customers
Export

Average Rating 4.4 

Ratings 5 

Name	Email	Phone Number	Transactions
Stacy Aarron	Stacey@customer.com	555-820-8124	2 Transactions
Anthony Abero	Anthony@customer.com	555-820-8124	4 Transactions
Susie Acerman	susie@customer.com	555-820-8124	3 Transactions
Robert Acsar	rob@customer.com	555-820-8124	2 Transactions
Julie Adams	Julian@customer.com	555-820-8124	7 Transactions
Sarah Adams	sarah@customer.com	555-820-8124	4 Transactions
Henry Ahzar	hahazar@customer.com	555-820-8124	8 Transactions
Joseph Allendale	joe@customer.com	555-820-8124	5 Transactions
Victoria Alride	victoria@customer.com	555-820-8124	3 Transactions
Michael Amdale	Michael@customer.com	555-820-8124	6 Transactions
Stacy Aarron	Stacey@customer.com	555-820-8124	2 Transactions
Anthony Abero	Anthony@customer.com	555-820-8124	9 Transactions
Susie Acerman	susie@customer.com	555-820-8124	7 Transactions

Edit Customer

First Name

Last Name

Phone Number

Email Address

[Add Email](#)

Details

1 Transactions

[See Transactions](#)

Customer Experience

0 Ratings  Average Rating

[Cancel](#) [Save](#)

Need Help?

Inventory

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

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

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 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.

The screenshot shows the 'Inventory' management interface. On the left, there is a sidebar with a '+ Create' button. The main area displays a table of items:

Item Name	Barcode Number	# In Stock	Price
Americano	No barcode	Not tracked	\$2.95
Cappuccino	No barcode	Not tracked	\$4.95
Espresso	No barcode	Not tracked	From \$2.50
House blend coffee	No barcode	Not tracked	\$2.95
Latte	No barcode	Not tracked	From \$5.95
Sandwich	000691723009	14 in stock	\$7.99
Spanish Coffee	No barcode	Not tracked	\$7.95
Tiramisu	000691723009	3 in stock	\$12.95
Torino blend ground coffee	000691723009	52 in stock	\$1.95
Water	000691723009	176 in stock	\$0.99

At the bottom of the table, there are buttons for '+ Add to category', 'Archive', and 'Cancel'. A status bar at the bottom left indicates '7 Items selected'.

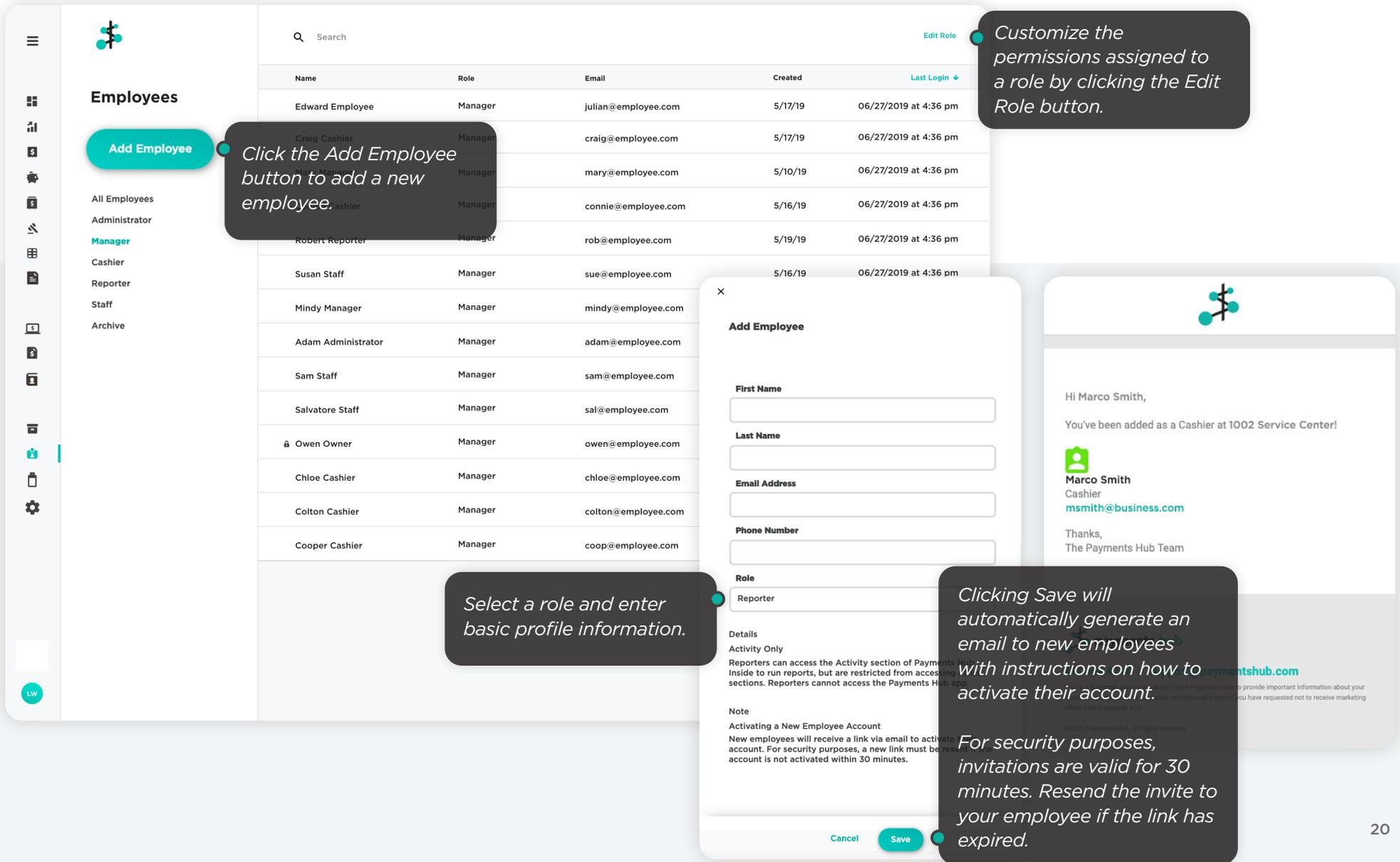
The screenshot shows the detail view for 'Torino blend coffee'. It includes a photo of the coffee bag and several action buttons: 'Remove photo', 'Remove from favorites', and 'Discount this item'. Below these are dropdown menus for 'Category' (set to 'Breakfast') and 'Tax' (set to 'None'). There are also toggle switches for 'Track stock for this item' (checked) and 'Allow out of stock sales' (unchecked). At the bottom, there is a table of price variants:

Name	Barcode #	Price	# In Stock	Low Stock Alert
8.6 oz	88888881	\$8.95	26	5
16 oz	88888882	\$14.95	0	5
5 lb	88888883	\$29.95	14	5

A '+ Add item variant' button is located at the bottom left of the table.

Employees

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



The screenshot displays the 'Employees' management page. On the left is a sidebar with navigation icons and a list of roles: All Employees, Administrator, **Manager**, Cashier, Reporter, Staff, and Archive. The main area shows a table of employees with columns for Name, Role, Email, Created, and Last Login. A search bar and an 'Edit Role' link are at the top right. A modal window titled 'Add Employee' is open, showing fields for First Name, Last Name, Email Address, and Phone Number, with a dropdown for Role set to 'Reporter'. Below the form are sections for 'Details' and 'Note'. A separate email preview shows a welcome message to Marco Smith, identifying him as a Cashier and providing a link to activate his account. Callouts provide instructions on how to use these features.

Name	Role	Email	Created	Last Login
Edward Employee	Manager	julian@employee.com	5/17/19	06/27/2019 at 4:36 pm
Craig Cashier	Manager	craig@employee.com	5/17/19	06/27/2019 at 4:36 pm
Mary Manager	Manager	mary@employee.com	5/10/19	06/27/2019 at 4:36 pm
Connie Cashier	Manager	connie@employee.com	5/16/19	06/27/2019 at 4:36 pm
Robert Reporter	Manager	rob@employee.com	5/19/19	06/27/2019 at 4:36 pm
Susan Staff	Manager	sue@employee.com	5/16/19	06/27/2019 at 4:36 pm
Mindy Manager	Manager	mindy@employee.com		
Adam Administrator	Manager	adam@employee.com		
Sam Staff	Manager	sam@employee.com		
Salvatore Staff	Manager	sal@employee.com		
Owen Owner	Manager	owen@employee.com		
Chloe Cashier	Manager	chloe@employee.com		
Colton Cashier	Manager	colton@employee.com		
Cooper Cashier	Manager	coop@employee.com		

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.
- Add Employee Form:** Select a role and enter basic profile information.
- Email Preview:** Clicking Save will automatically generate an email to new employees with instructions on how to activate their account.
- Security Note:** For security purposes, invitations are valid for 30 minutes. Resend the invite to your employee if the link has expired.

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

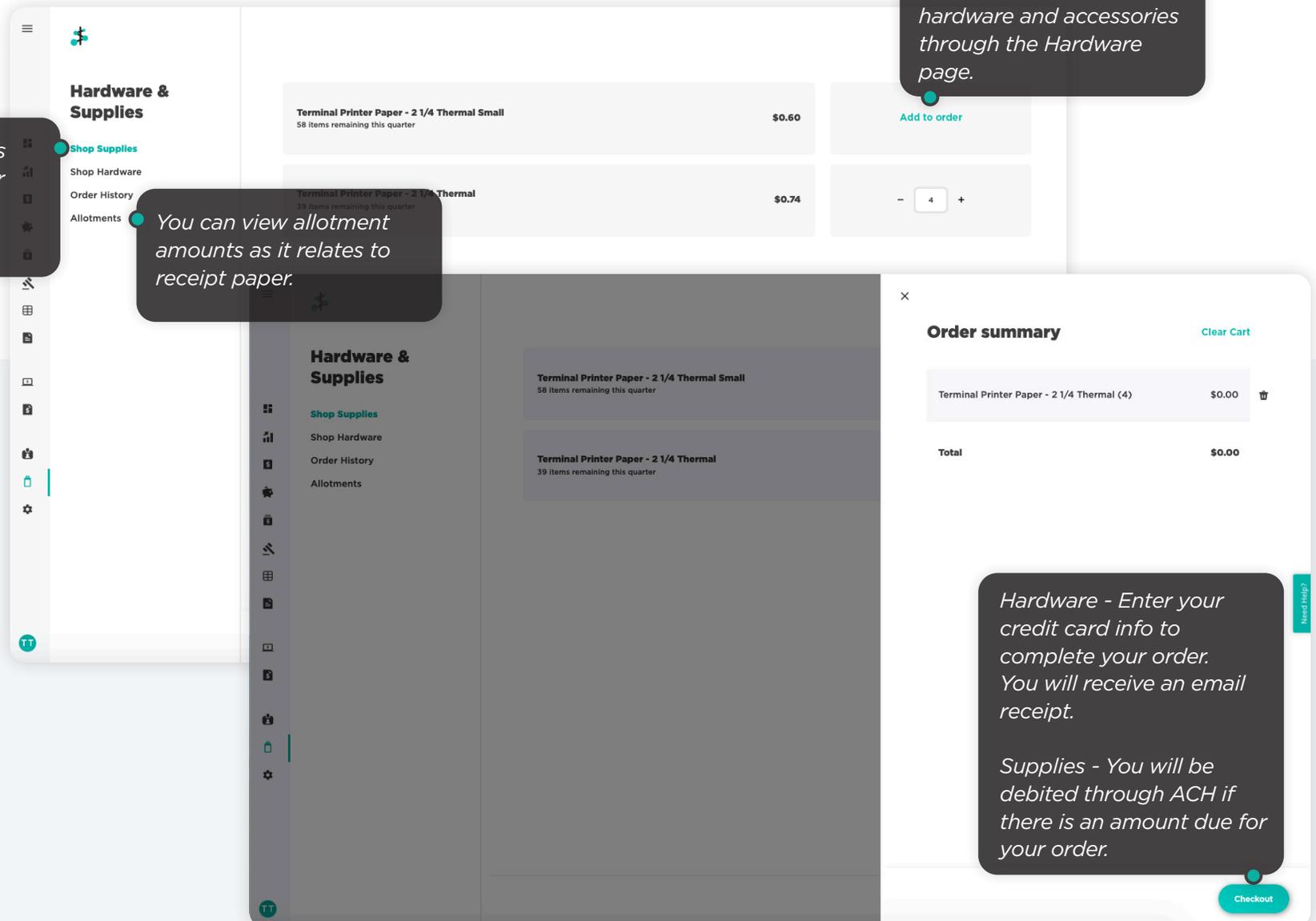
Hardware & Supplies

Order additional hardware, accessories, and supplies.

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

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

Purchase Payanywhere hardware and accessories through the Hardware page.



The screenshot displays the 'Hardware & Supplies' interface. On the left is a navigation sidebar with options: Shop Supplies (highlighted), Shop Hardware, Order History, and Allotments. The main content area shows a list of items:

Item Name	Price	Action
Terminal Printer Paper - 2 1/4 Thermal Small <small>58 items remaining this quarter</small>	\$0.60	Add to order
Terminal Printer Paper - 2 1/4 Thermal <small>39 items remaining this quarter</small>	\$0.74	- 4 +

An 'Order summary' modal is open on the right, showing:

Item	Price	Quantity
Terminal Printer Paper - 2 1/4 Thermal (4)	\$0.00	4
Total	\$0.00	

At the bottom right of the modal is a 'Checkout' button. A 'Need help?' link is visible on the far right edge of the modal.

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.



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.

The screenshot displays the 'Business settings' sidebar on the left and the 'Receipt Settings' main content area on the right. The sidebar includes a menu with icons for various settings: App settings, Receipt settings (highlighted in teal), Business profile, Compliance & tax, Funding, Alerts, Integrations, and Devices. The 'Receipt Settings' page features a 'Logo' section with a preview of a red receipt logo and a 'Remove logo' link. Below this are input fields for 'Business Name' (Name), 'Street Address' (Address), 'City', 'State' (a dropdown menu), and 'Zip Code'. There are also fields for 'Phone Number' and 'Website', and an 'Email' field. At the bottom right of the page, there are two buttons: 'View receipt preview' and 'Save settings'.

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>

The image shows a business dashboard on the left and a help center overlay on the right. The dashboard features a bar chart of sales data, a summary of key metrics, and a 'Needs Attention' section. The help center overlay includes a search bar, navigation icons for various help topics, and a list of suggested articles.

Dashboard Metrics:

- Gross Sales: **\$10,072.88** (↑ 12.5%)
- Transactions: **789** (↑ 9.0%)
- Refunds and voids: **-\$344.50** (↑ 4.5%)

Needs Attention:

- 2 new disputes
- 2 subscription payments failed
- 3 items are out of

Most recent activity:

- Deposit for \$1,192.83 (8/10/19 at 1:03am) - Download report
- Batch for \$1,192.83 (8/11/19 at 11:50pm) - Download report
- July 2019

Invoices:

- Paid invoices: \$4,938.92
- Unpaid invoices: \$1,808.28
- Overdue invoices: \$872.50

Help Center:

- Search for help
- What's New
- Self Help
- Help Videos
- Chargebacks
- Order Supplies
- Statements
- Suggested articles:
 - [Card present Virtual Terminal transactions](#)
 - [Want to talk?](#)
 - [Employee roles & permissions](#)
- Getting Started:
 - [Icon Glossary](#)
 - [Want to talk?](#)
 - [First time login](#)
 - [Supported Browsers](#)
- Release Notes

