Your guide to PayAnywhere Inside.



Version 5.5

Topics.

Activity

Today 04
Sales 05
Transactions 06
Deposits 07
Reports 08

Business

Customers 10
Employees 11
Online payments 12
Invoices 13
Recurring invoices & payments 14
Disputes 15

Library

Items 17
Item details 18
Manage stock 19
Categories, modifiers, and discounts 20

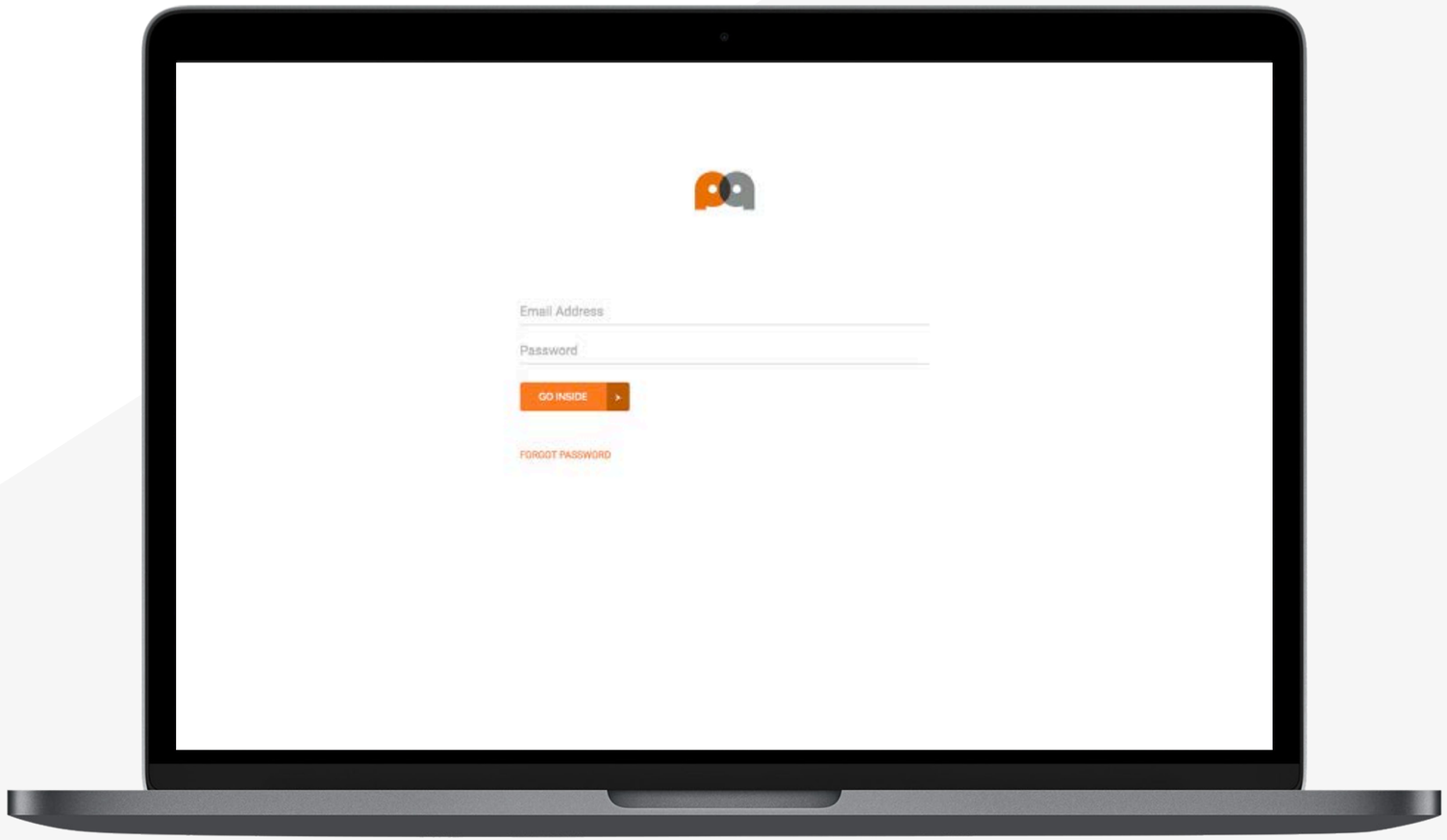
Etc.

Manage your account 22
Contact 23

Get started.

Log in.

Navigate to **inside.payanywhere.com** and enter the email and password you used when signing up for PayAnywhere. Then, enter the passcode you receive via SMS text.



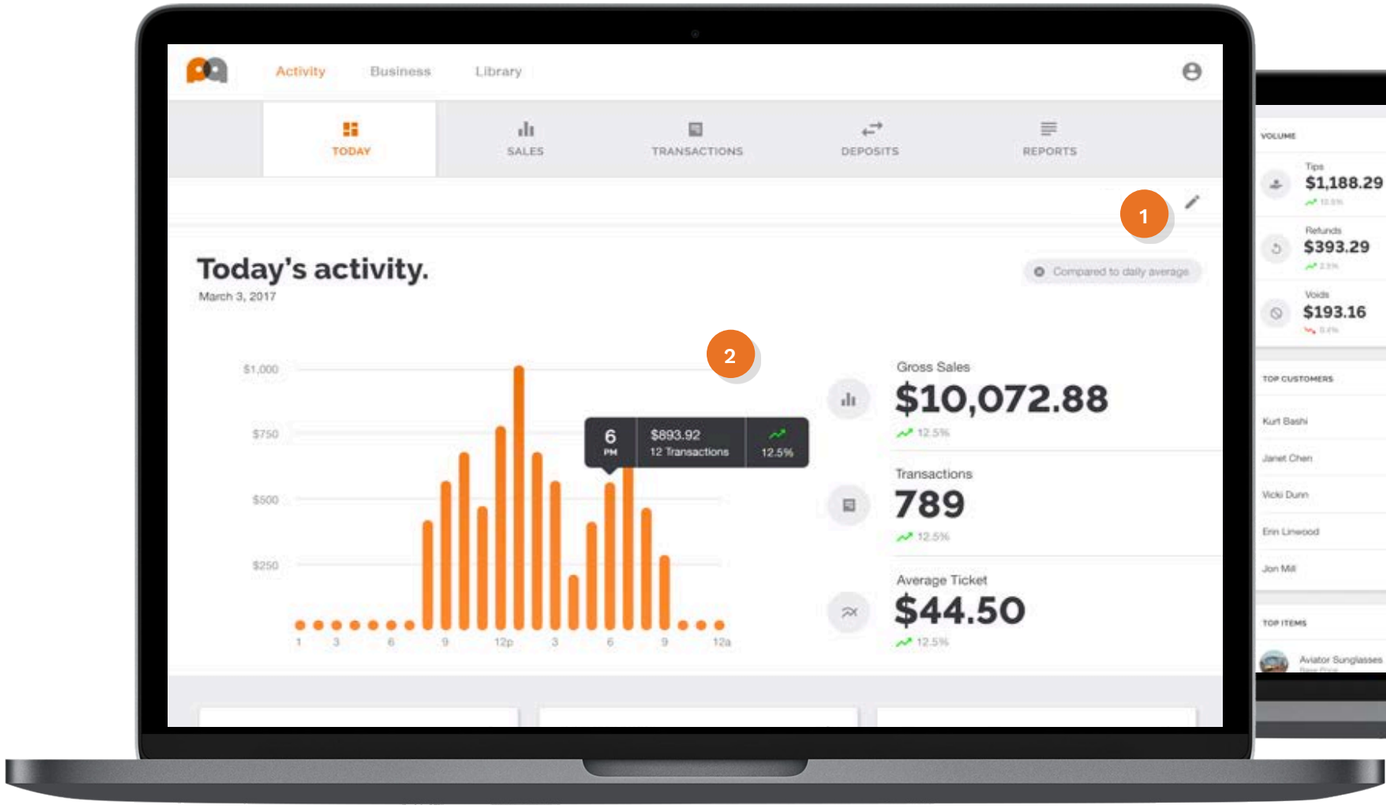
TIP

You will need to provide your account number in order to reset your password.

Activity.

Today.

Get a snapshot of your day with a detailed dashboard of high-level sales activity.



1. Edit button.

Toggle which information you want to see on your dashboard.

2. Volume.

Real-time totals for today's gross sales, number of transactions, and average ticket.

3. Widgets.

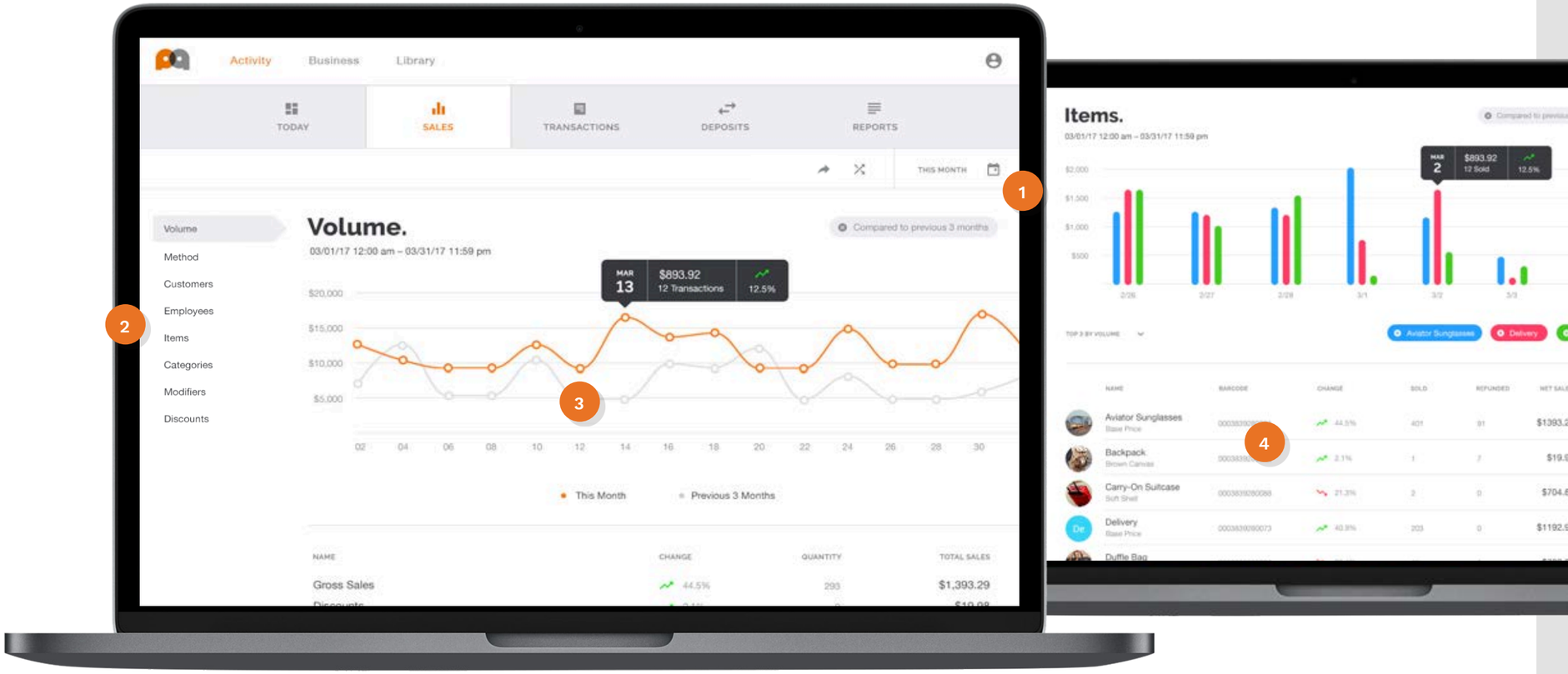
View sales and deposit data, customer trends, stock alerts, and top performing employees, customers, items, discounts, and modifiers.

TIP

Click on a widget title for a shortcut to that section, or click the Export button for a quick report.

Sales.

View sales volume, payment methods, and top sellers.



1. Date range.

Pick from convenient preselected periods or create a custom range.

2. Filter.

View sales data for volume, payment method, customers, employees, and your inventory.

3. Graphs.

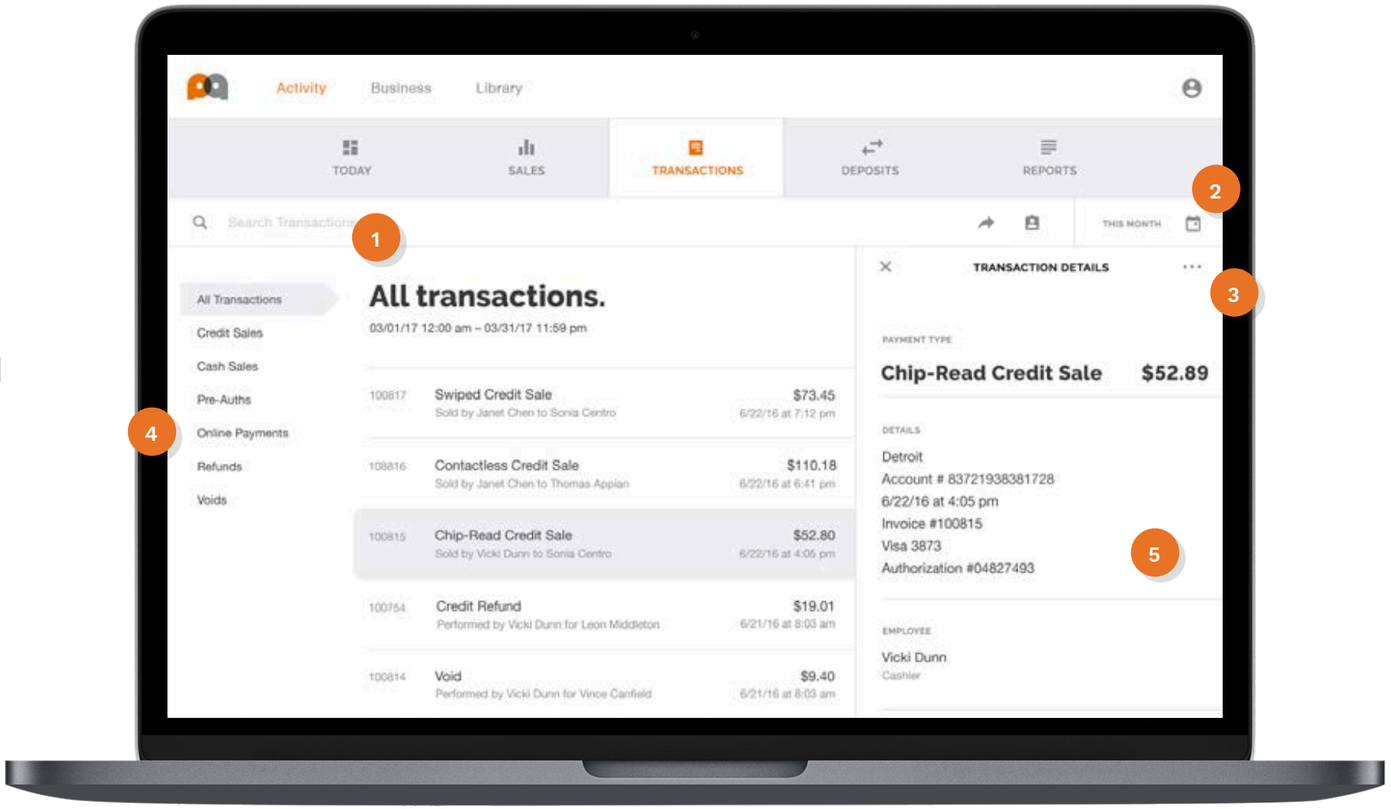
Get a visual of your sales trends and export reports.

4. Breakdown.

A complete listing of your sales data with comparison trends.

Transactions.

View and share your transactions.



1. Search.

Enter a card number, date, customer, or invoice number to filter results.

2. Date range.

Pick from convenient preselected periods or create a custom range.

3. Options.

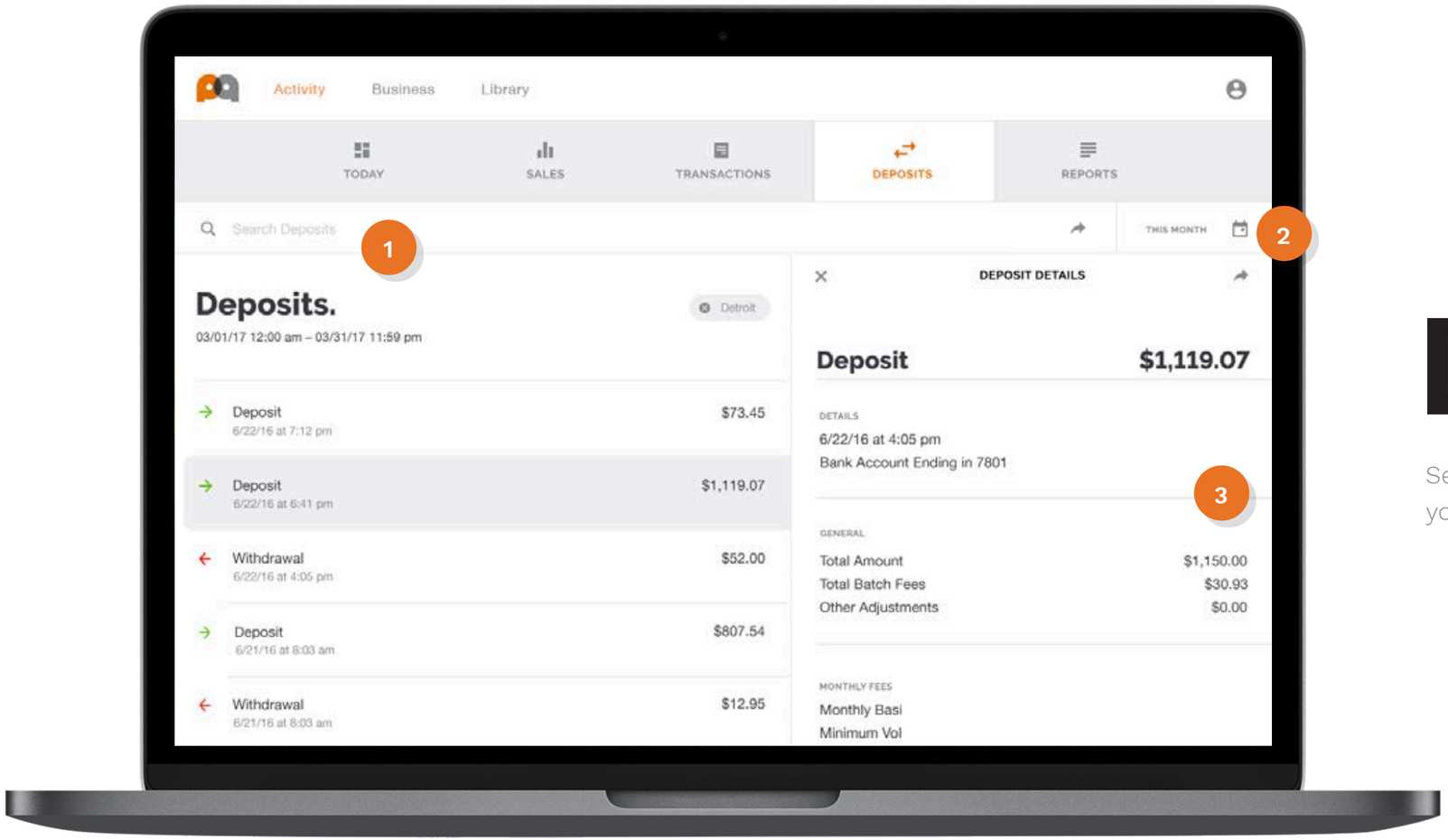
Email, SMS, or print a receipt.

4. Filter.

View all transactions or filter by sale, pre-auth, refund, or void.

5. Details.

View date and time, invoice number, payment method, employee, customer, and purchases.



Deposits.

See what's coming in and going out of the bank account you connected to PayAnywhere.

1. Search.

Enter a date, dollar amount, or type of deposit to filter results.

2. Date range.

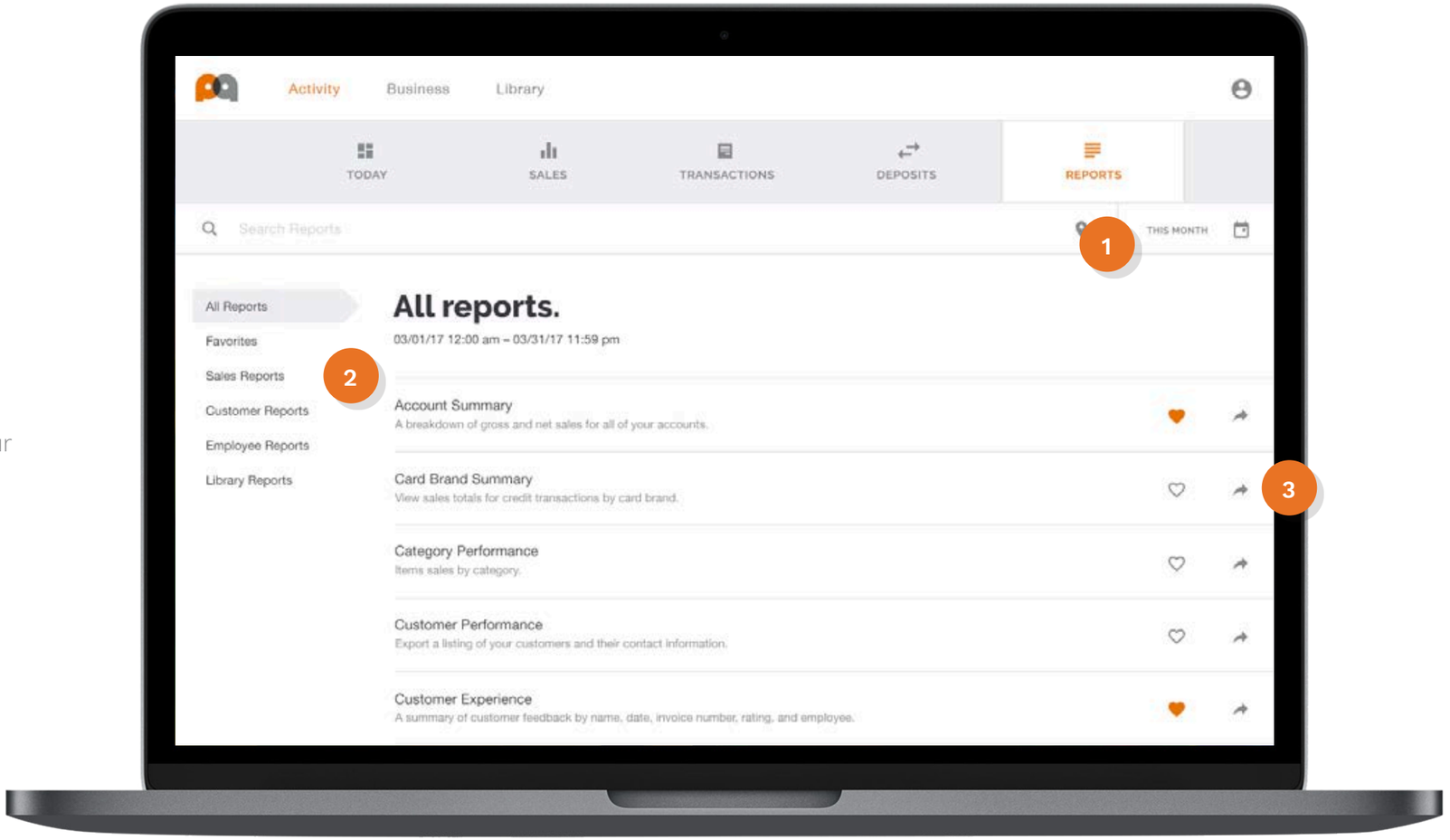
Pick from convenient preselected periods or create a custom range.

3. Details.

View date, fees, and adjustments for each deposit or withdrawal.

Reports.

Get a breakdown of the what, where, and how of your day-to-day sales.



1. Date range.

Pick from convenient preselected periods or create a custom range.

2. Report types.

Select from a variety of reports in the left panel.

3. Export.

Generate reports based on the selected date range.

Business.

BUSINESS

Customers.

View and export a list of your customers.

1. Search.

Enter a name, email, or phone to filter results.

2. Export.

Enter a name, email, or phone to filter results.

3. Add button.

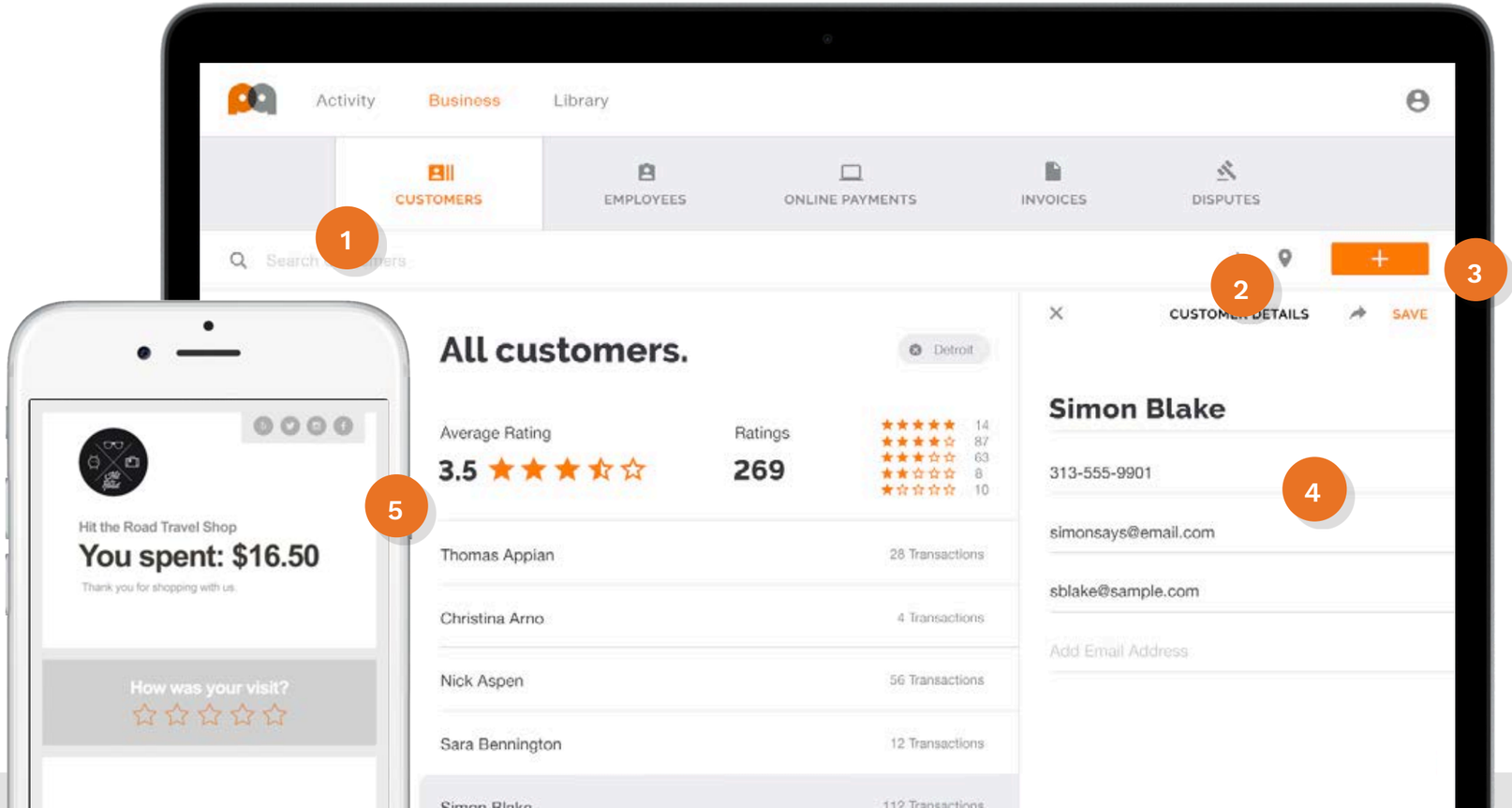
Create a new customer.

4. Details.

View name and contact information.

5. Customer Feedback

Enable under Receipt Settings in the PayAnywhere app.



BUSINESS

Employees.

Create and edit employees and assign roles based on permission level.
As the Business Principal, you are an Administrator by default.

1. Search.

Enter a name, role, email, or phone to filter results.

2. Add button.

Create a new employee.

3. Roles.

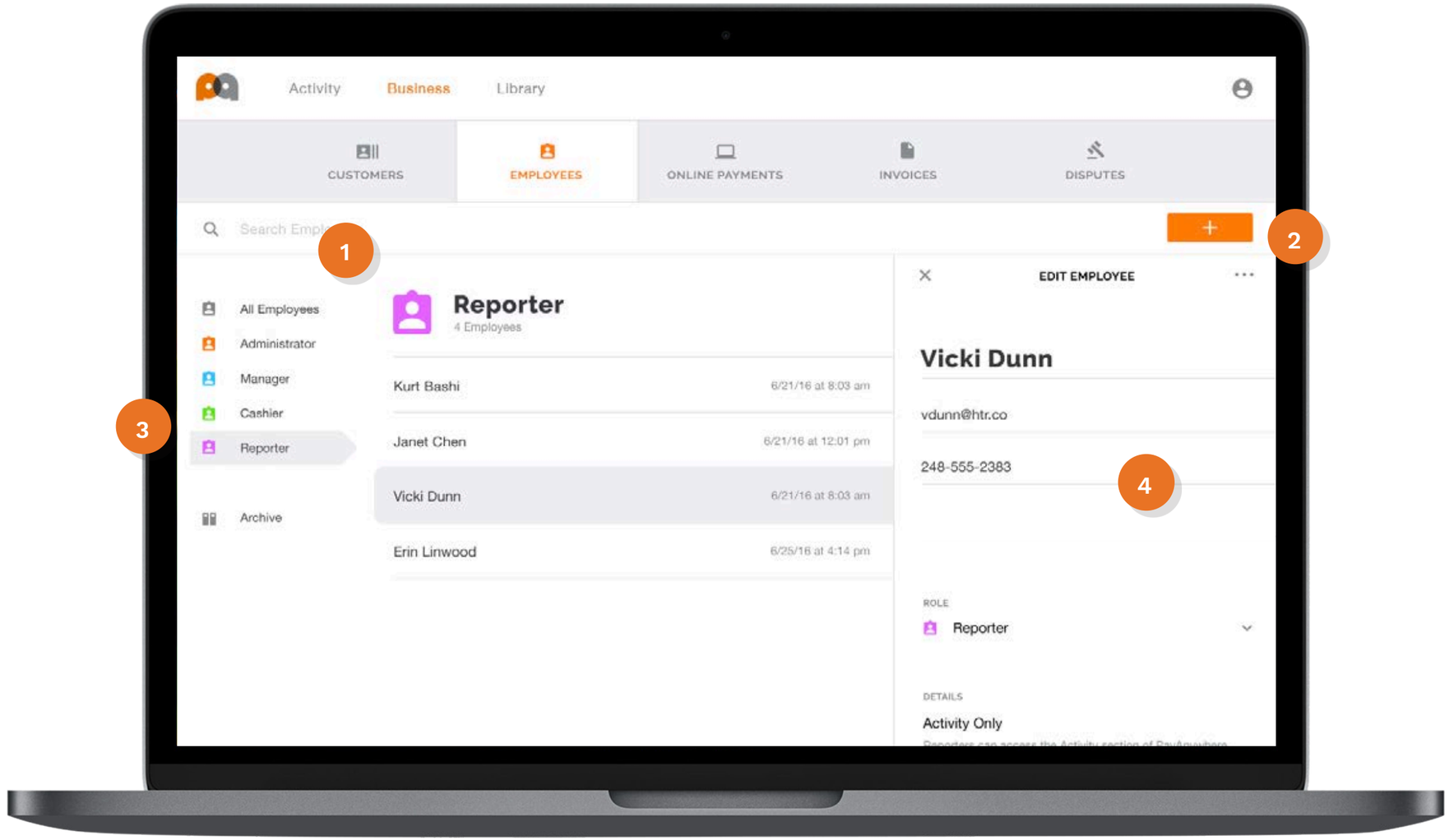
View all employees or filter to a single role:

Admin
Grant full access to the PayAnywhere app and PayAnywhere Inside.

Manager
Grant full access to the PayAnywhere app and limited access to PayAnywhere Inside.

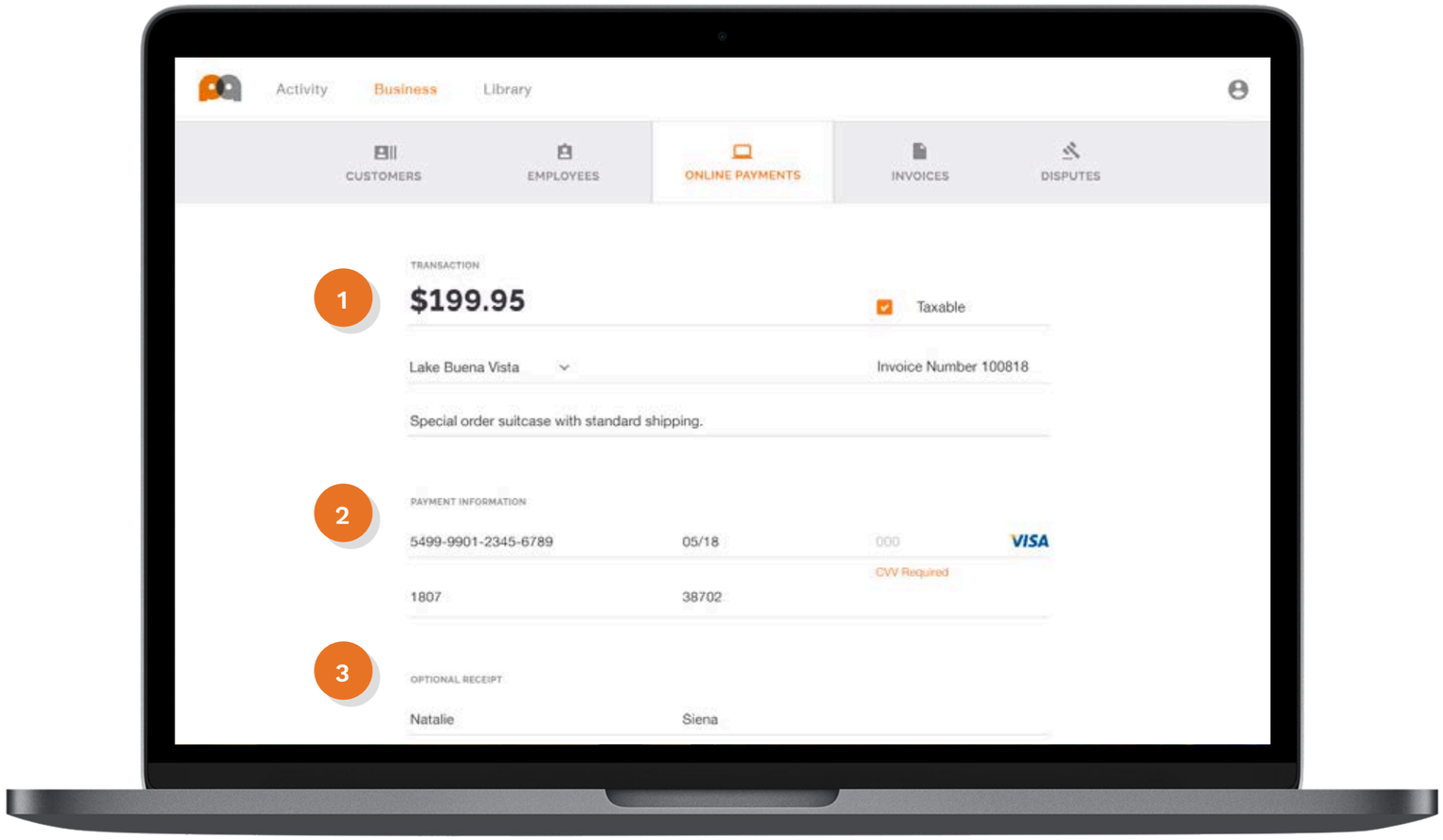
Cashier
An employee who accepts payments on your behalf with no access to PayAnywhere Inside.

Reporter
This user can view and pull reports with no access to the PayAnywhere app.



Online payments.

Use PayAnywhere Inside to accept payments, right in your browser.



1. Amount.

Enter transaction amount and optional notes.

2. Payment info.

Key in your customer's credit card information.

3. Receipt.

Assign a customer and enter contact information for an optional receipt.

BUSINESS

Invoices.

Create, manage, and send invoices and allow your customers to pay online. For pricing purposes, Invoices are considered keyed transactions.

1. Search.

Enter an invoice number, amount, customer name, or email address.

2. Invoice filter.

View all invoices or filter by paid, unpaid, and overdue status.

3. Add button.

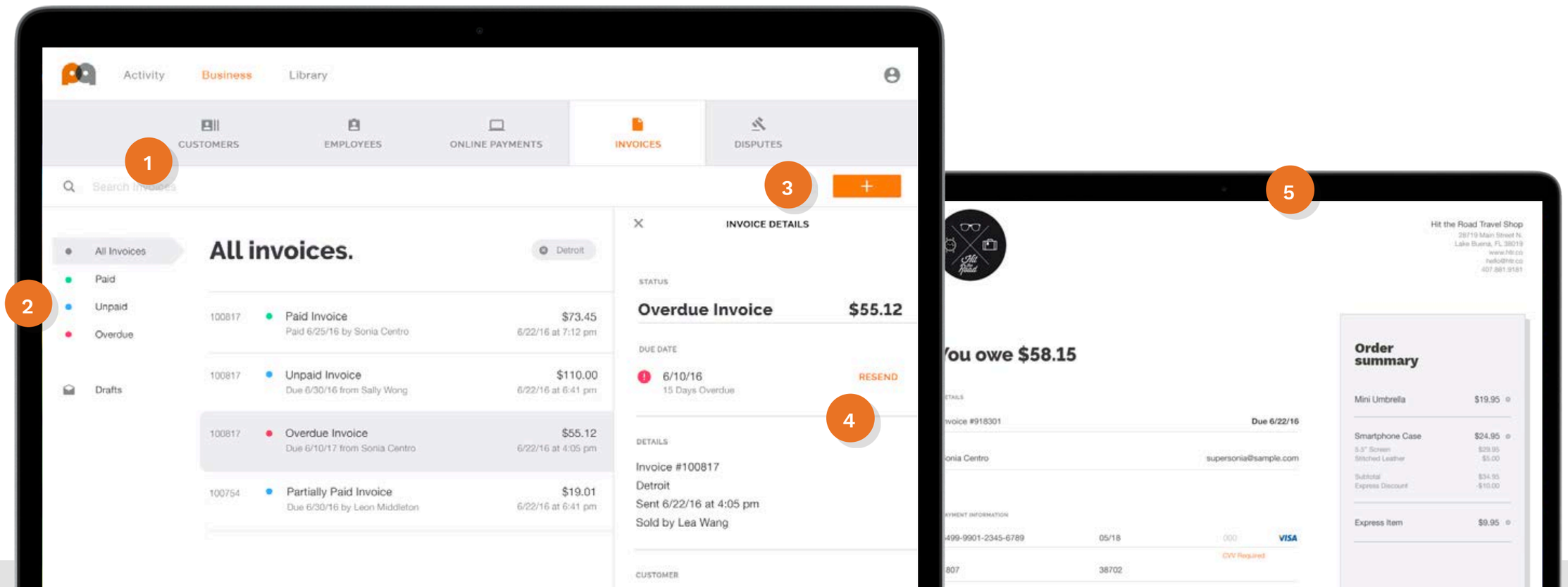
Create a new invoice.

4. Details.

Invoice amount, due date, and customer information.

5. Get paid.

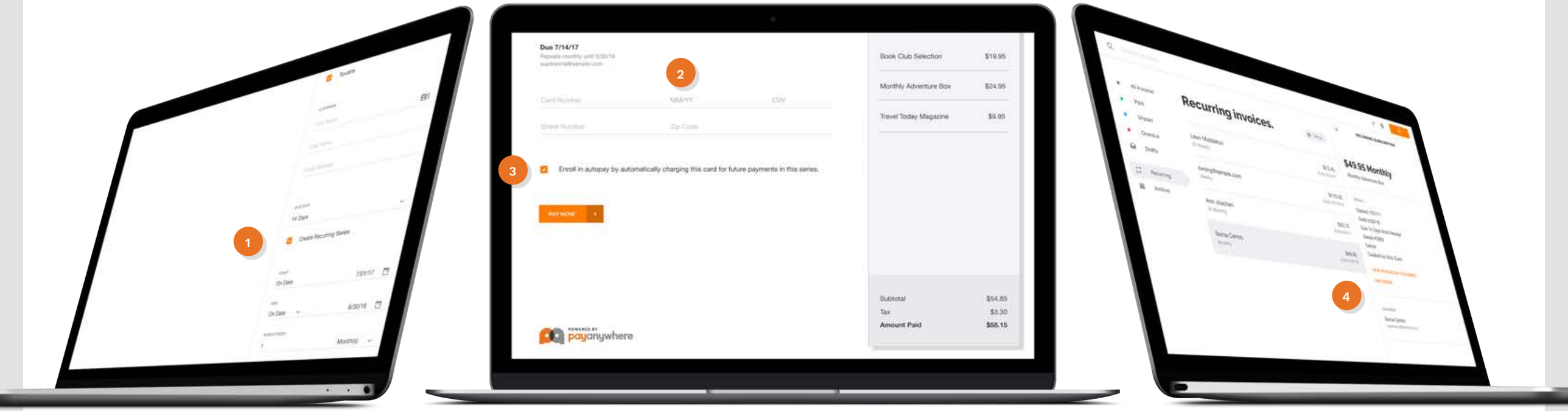
Send customers to a secure online payments page customized with your branding.



BUSINESS

Recurring invoices & payments

Create a recurring series of invoices and allow your customers to set up autopay.



1. Start series.

After entering invoice information, enable “Create Recurring Series” and choose the start date, end date, and when it should repeat.

2. Get info.

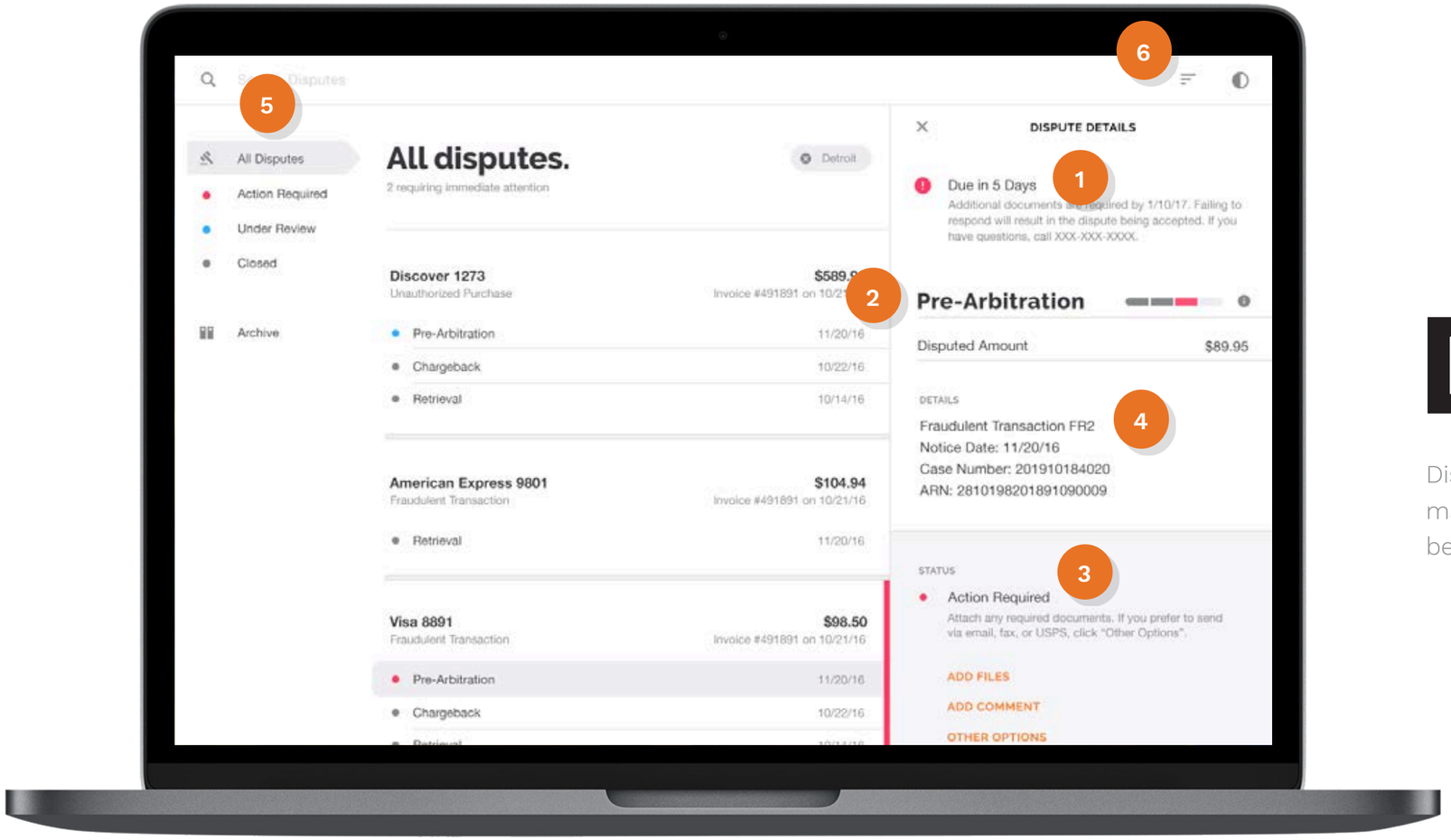
After your customer receives their invoice via email, they will be linked to a secure landing page to provide their credit card info.

3. Autopay.

The customer can save their card info and enable autopay to begin their subscription.

4. End series.

Select the customer from the Subscriptions filter and end the recurring subscription.



Disputes.

Disputes provides a convenient way to view and manage chargebacks, and dispute the ones you believe are not valid.

1. Due date.

The date in which all supporting documents for your dispute are due.

2. Stage.

The stage in which your dispute stands in the dispute process.

3. Action.

Attach supporting documents or add comments regarding your dispute.

4. Details.

Name, Notice Date, Case Number, and ARN.

5. Filter.

View your disputes by Action Required, Under Review, or Closed.

6. Sort.

View your disputes by recent case activity or original transaction date.

Library.

LIBRARY

Items.

Create sellable products with multiple variants.

1. Search.

Enter an item name, price name, barcode number, or price to filter results.

2. Add button.

Create a new item.

3. Import.

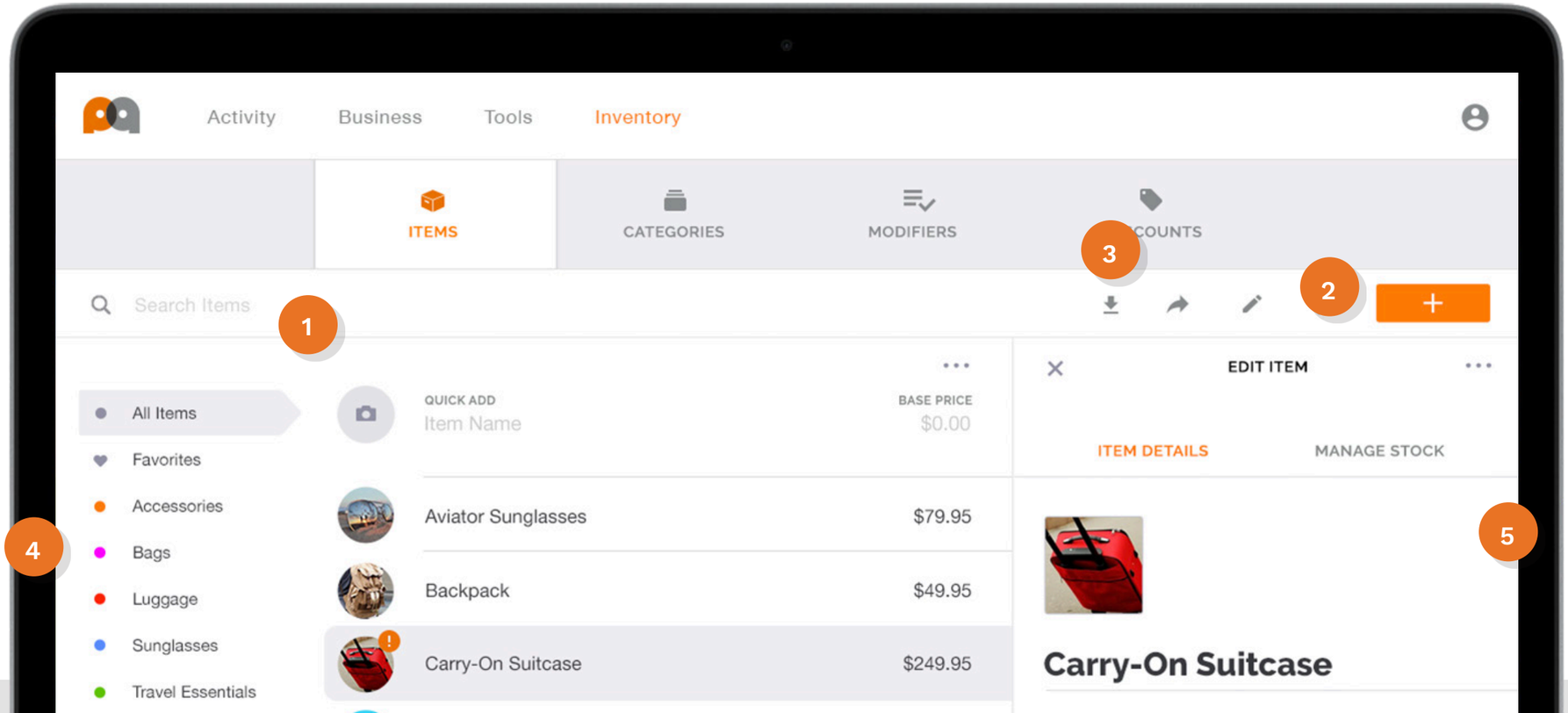
Enter items into the excel template and import to bulk upload your library.

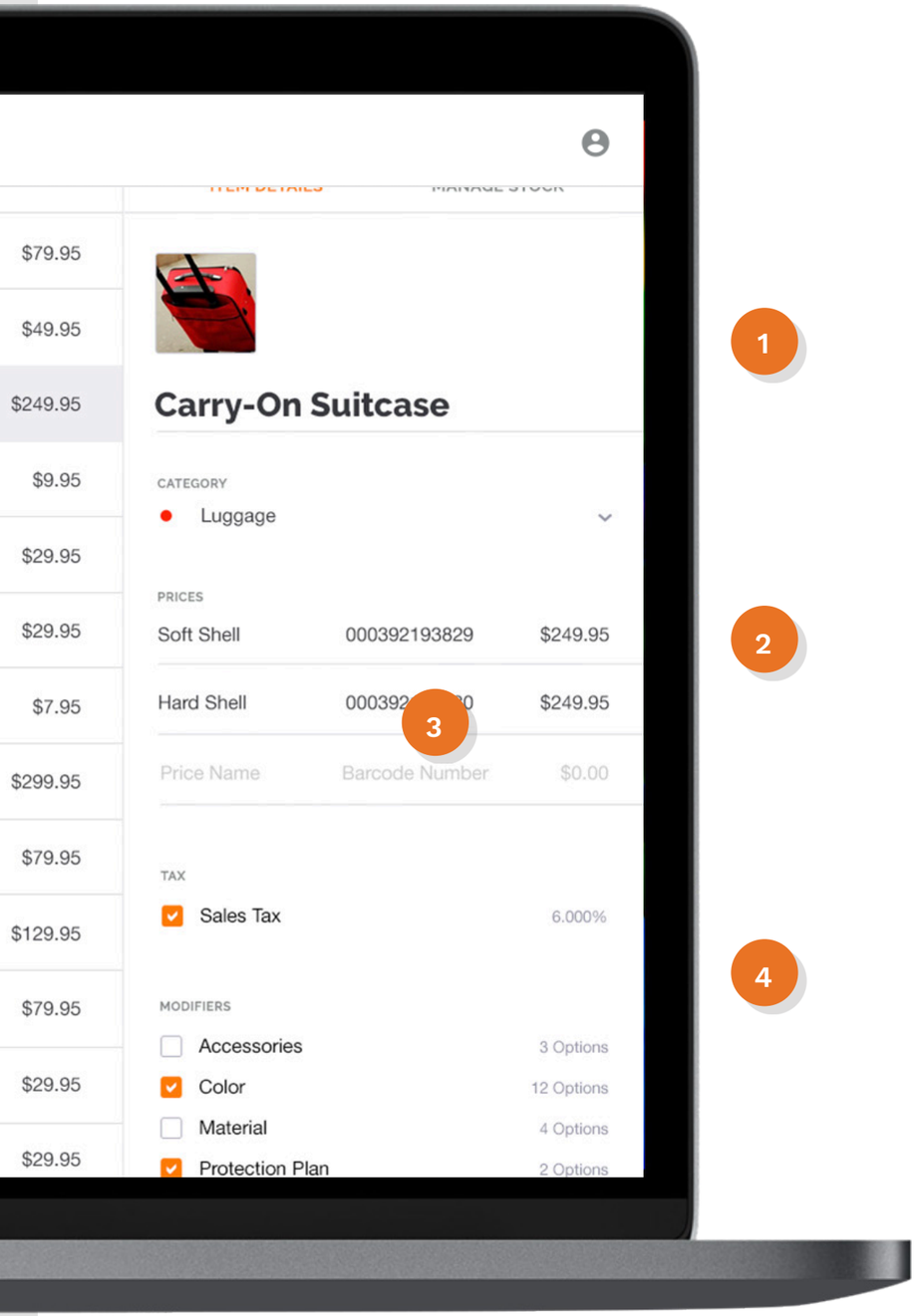
4. Category filter.

View all items or filter by assigned category.

5. Item options.

Mark as a favorite, or remove from your library.





Item details.

Create endless variations of your items with powerful customization options.

1. Basic info.

Enter an item name, select a category, and assign an optional photo.

2. Multiple prices.

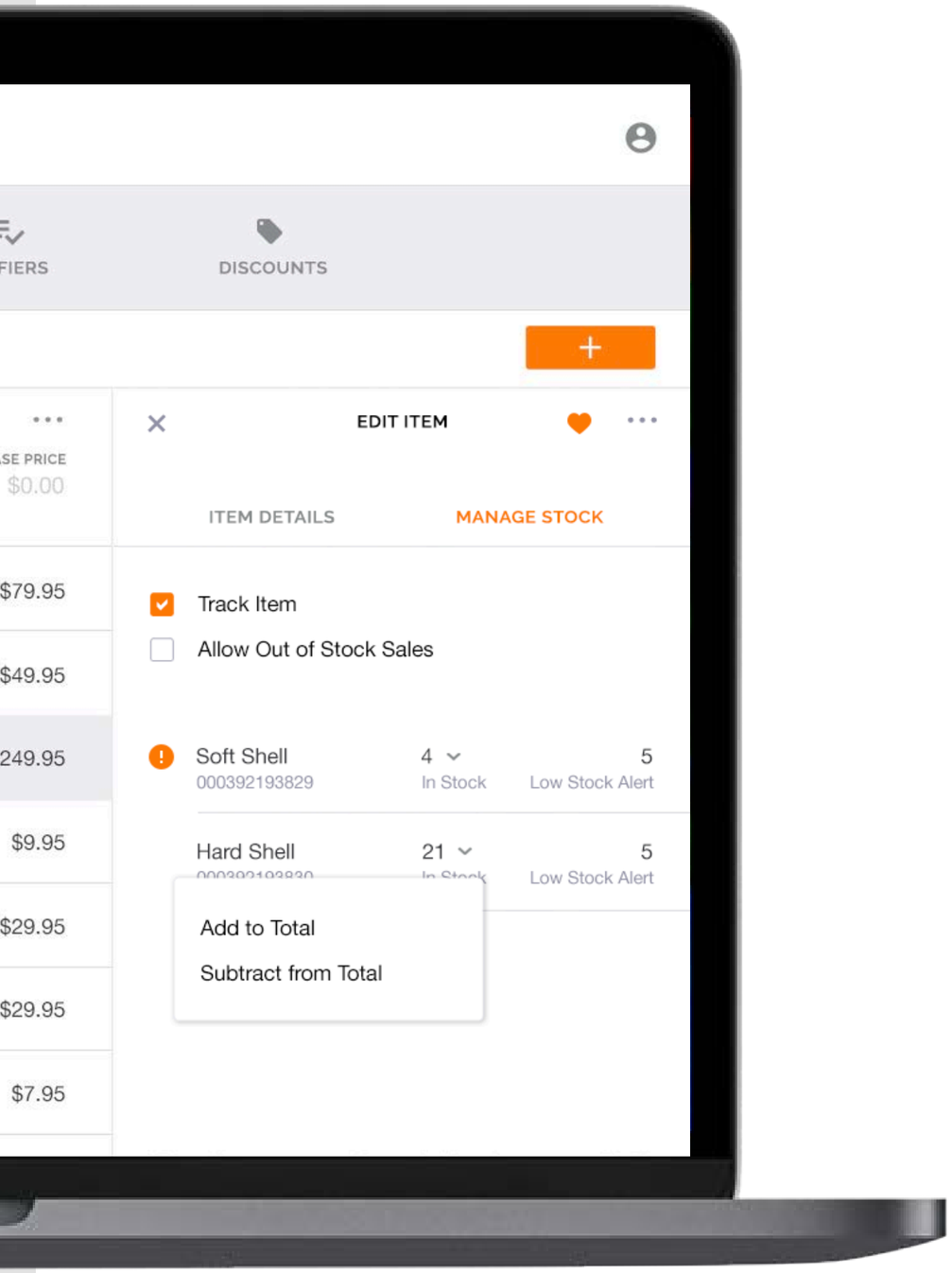
Enter at least one price and an optional price name, or add several.

3. Barcode number.

Enter an optional barcode number for each item price.

4. Tax and modifiers.

Assign optional tax and modifier sets that allow customization at the time of sale.



Manage stock.

Track your inventory and sync quantities across devices. Just enter the stock on hand for each price line. Set custom stock alerts and allow for out of stock sales.

LIBRARY

Categories, modifiers, and discounts.

Organize and customize your item library.

1. Categories.

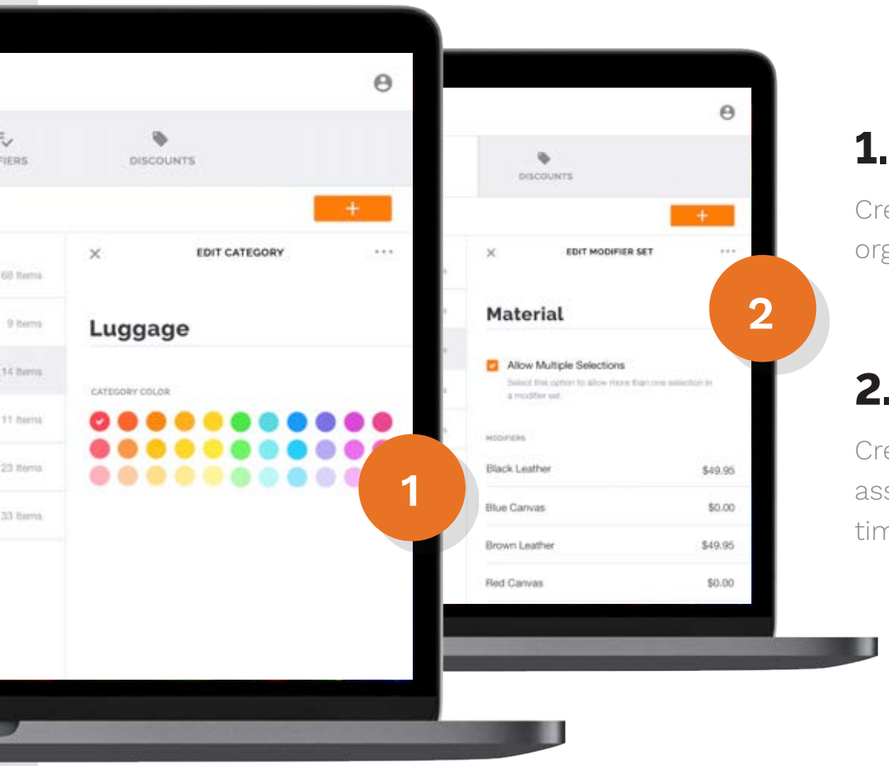
Create color-coded groups to organize your items.

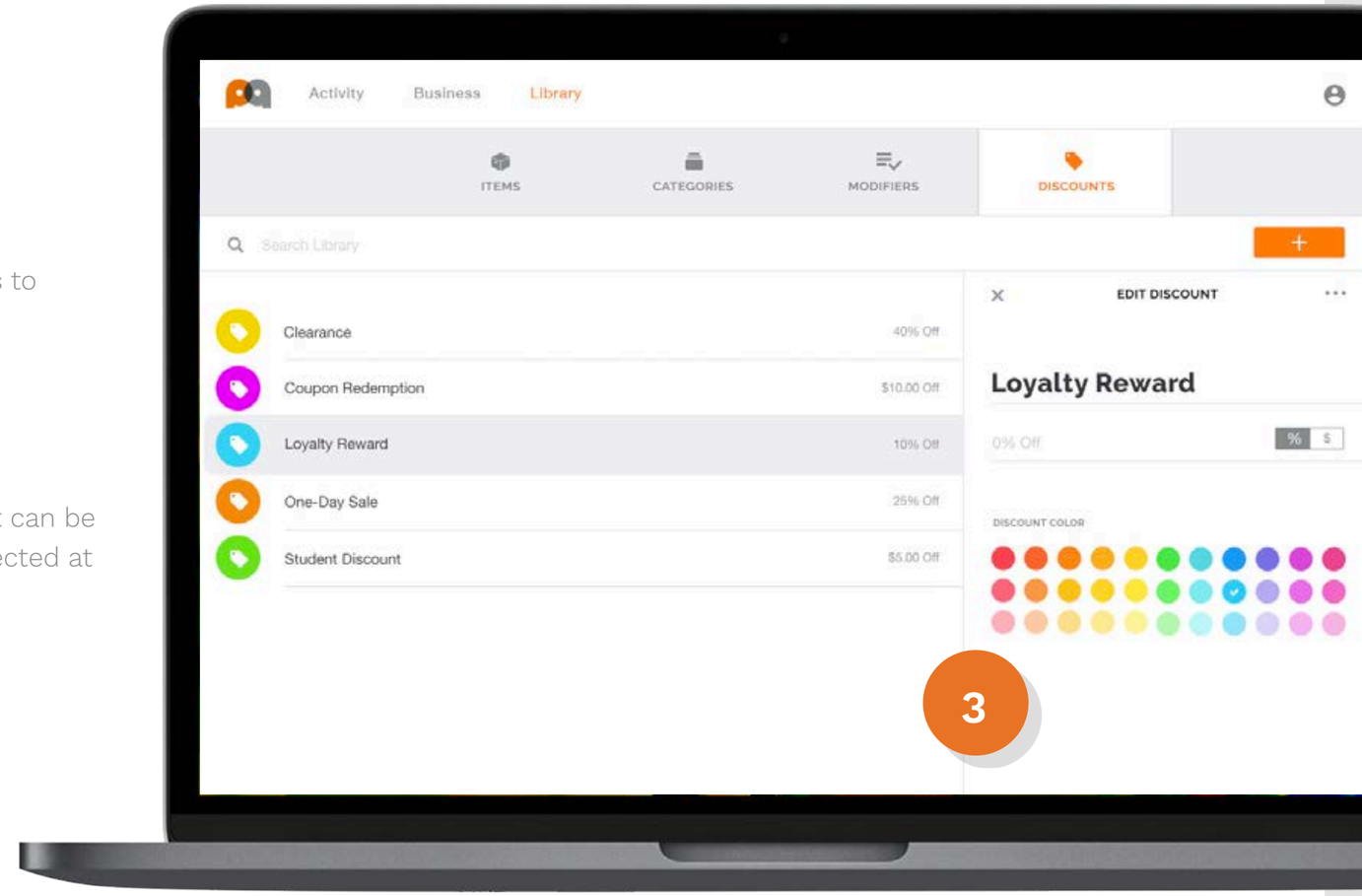
2. Modifiers

Create sets of options that can be assigned to items and selected at time of sale.

3. Discounts.

Create color-coded dollar or percentage-based discounts.





Etc.

Manage your account.

1. Account menu.

Navigate to the acount icon in the upper right corner of the screen.

2. Profile.

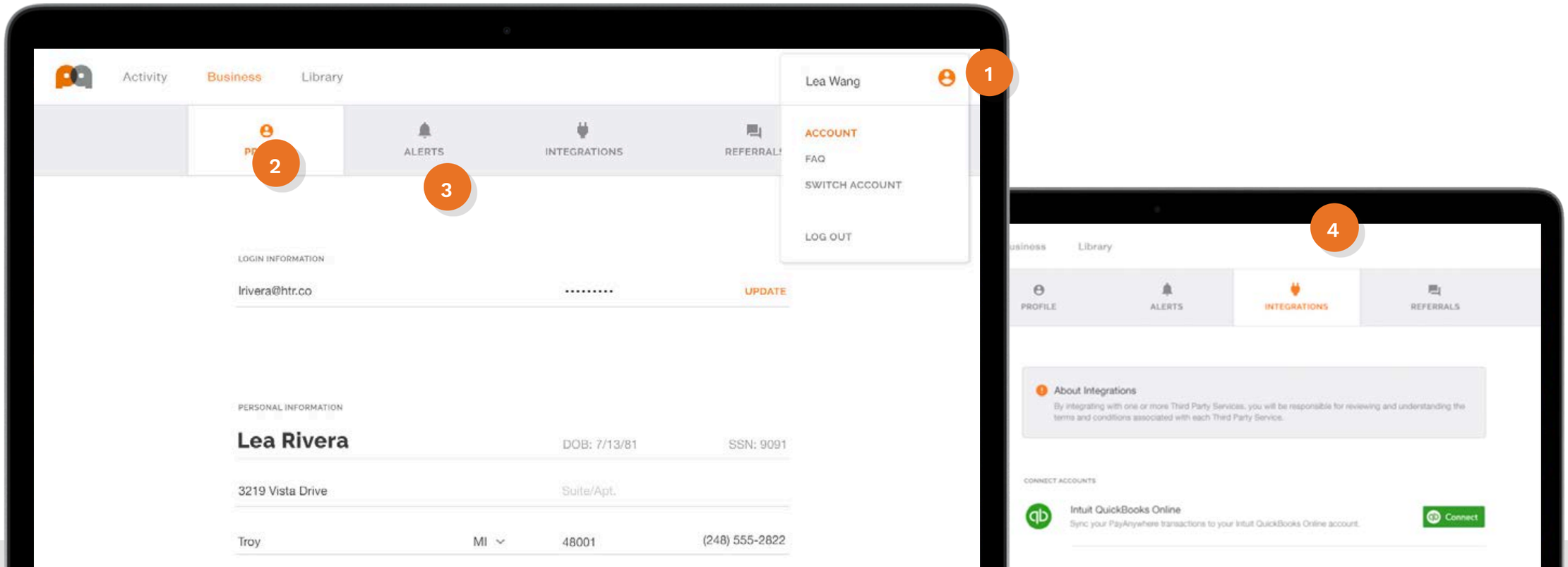
Change your password, order additional card readers, and manage tax documentation.

3. Alerts.

Generate email notifications based on processing, batch, and more.

4. Integrations.

Connect your PayAnywhere sales data to your QuickBooks Online account.



Still have questions?

Help guide and video tutorials.

payanywhere.com/faq

Customer service and technical support.

Monday - Friday, 8am - 9pm ET
Saturday-Sunday, 8am - 6pm ET
1.877.387.5640
custservice@payanywhere.com

Be social with us.

facebook.com/payanywhere
twitter.com/payanywhere
youtube.com/payanywhere