MarketSharp Onboarding Guide

PAYSIMPLE®

Welcome to PaySimple!

We are so excited to partner with you to help streamline your payment processes.

This onboarding guide is designed to help you complete set-up, navigate the integration, and ensure you're taking advantage of our entire suite of payment options!

Getting Started with PaySimple

Overview

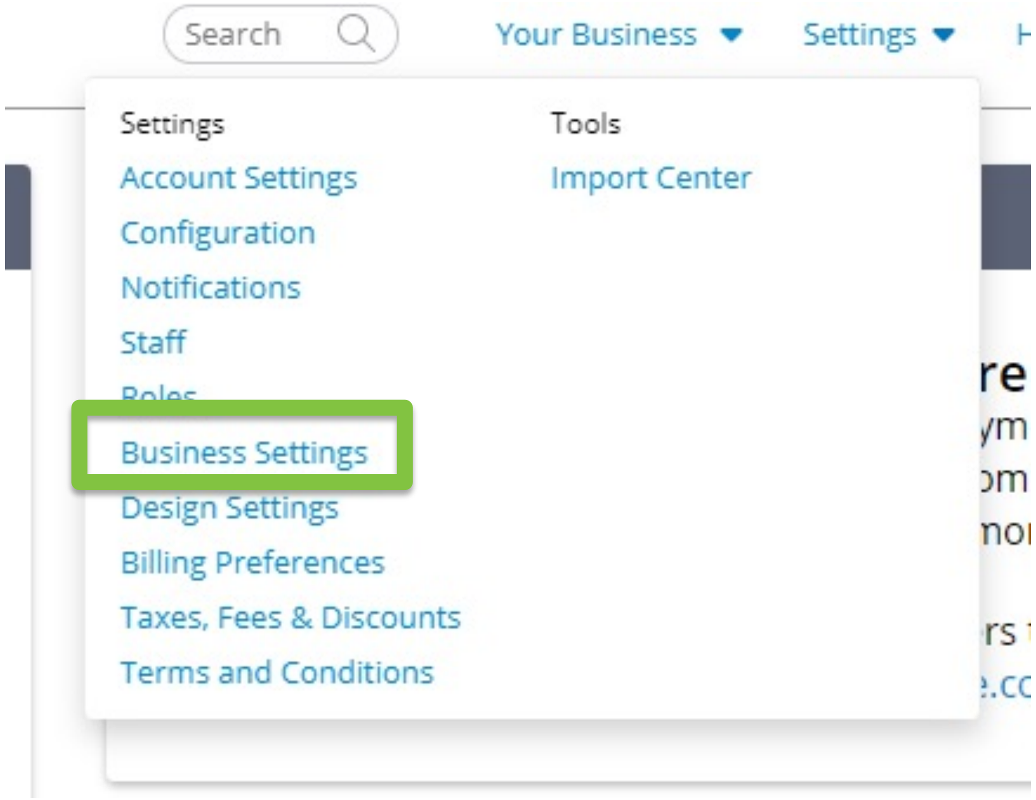
1. How to customize your business information
2. How to add staff
3. How to create catalog items
4. How to enable Online Payments
5. How to utilize the PaySimple mobile app
6. Processing payments within your MarketSharp CRM

Step 1: Update your business information

Settings > Business Settings

Click “Settings,” then click “Business Settings.”

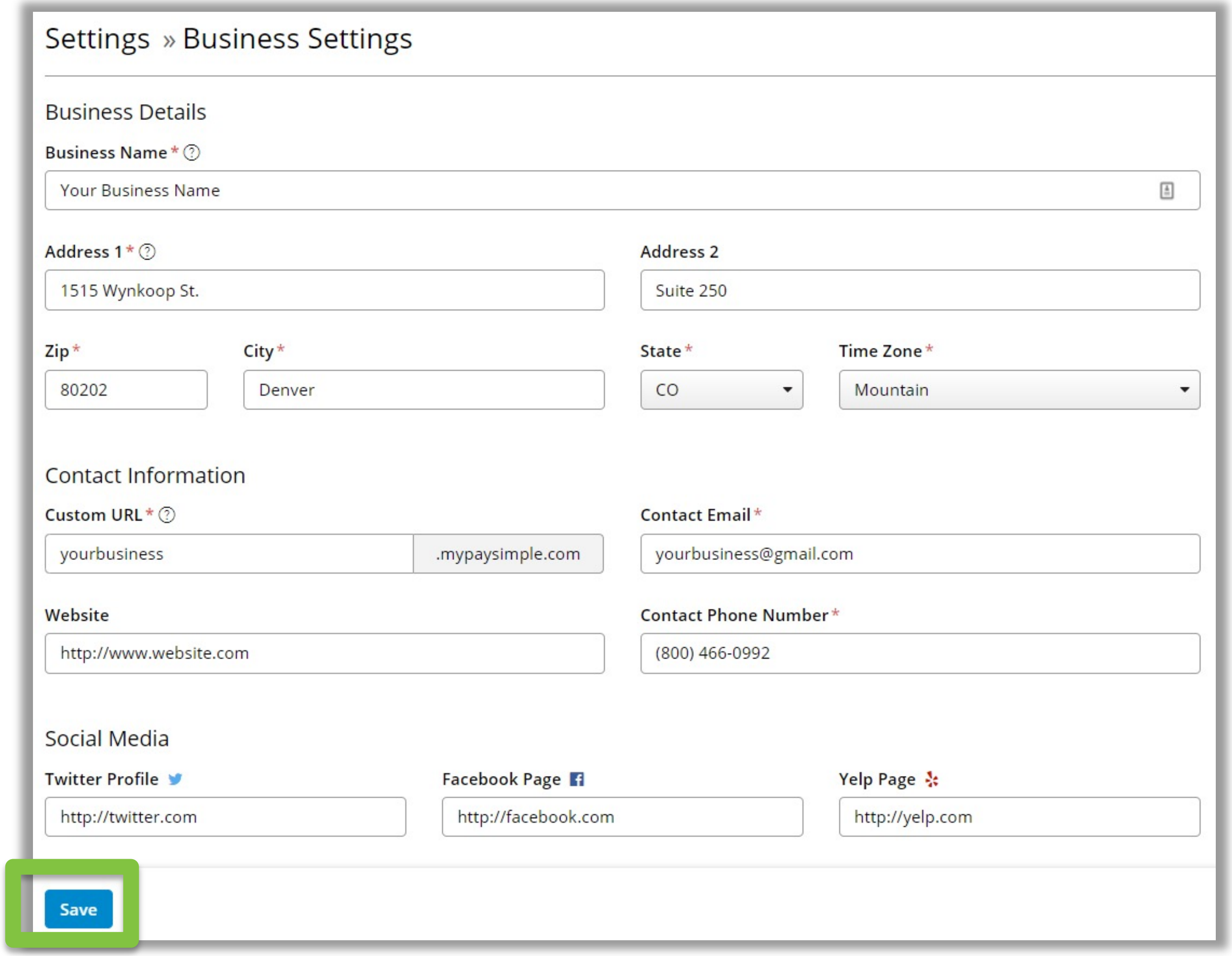
The settings are a great place to start and ensure all your business settings are correct; keep in mind this contact information will be on your customer’s receipts. Having this information up to date will ensure your clients have the correct information to contact you.



Step 1: Update your business information

Settings > Business Settings

Edit your information, then click “Save.”

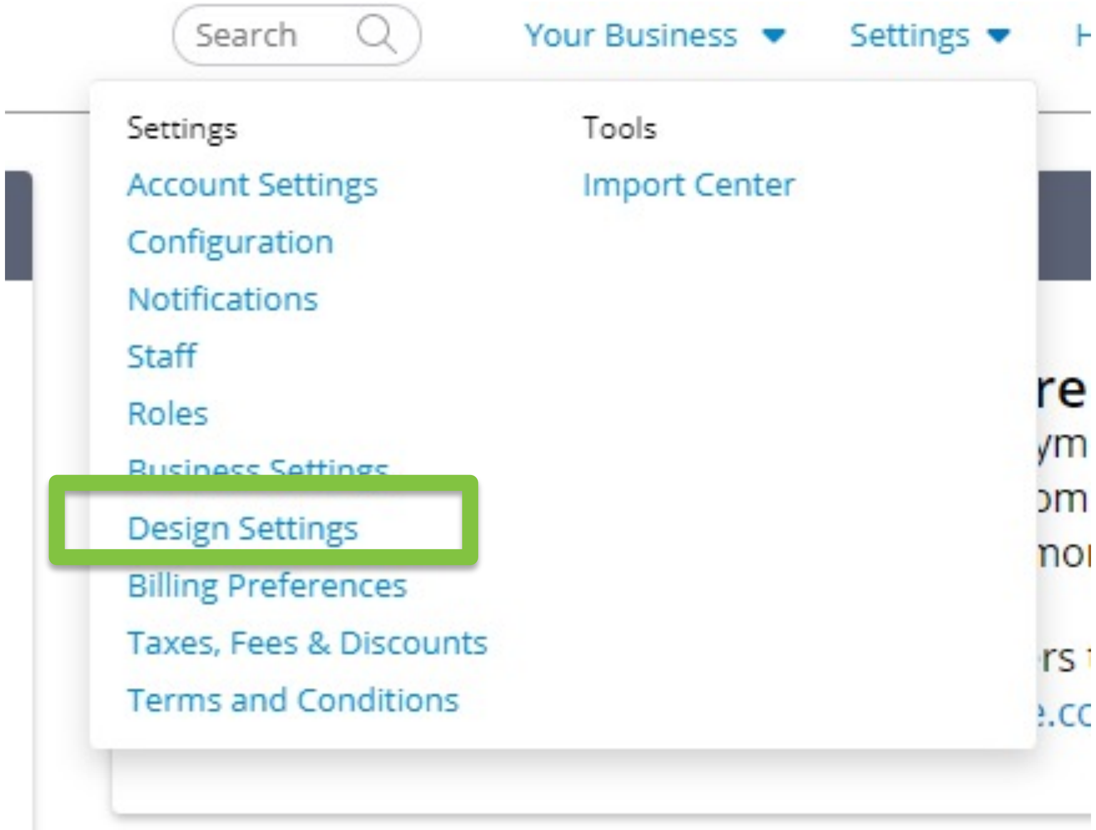


Step 2: Customize branding

Settings > Design Settings

Click “Settings,” then click “Design Settings.”

Design settings allow you to add your business logo to customer receipts and customize the platform to match your brand.

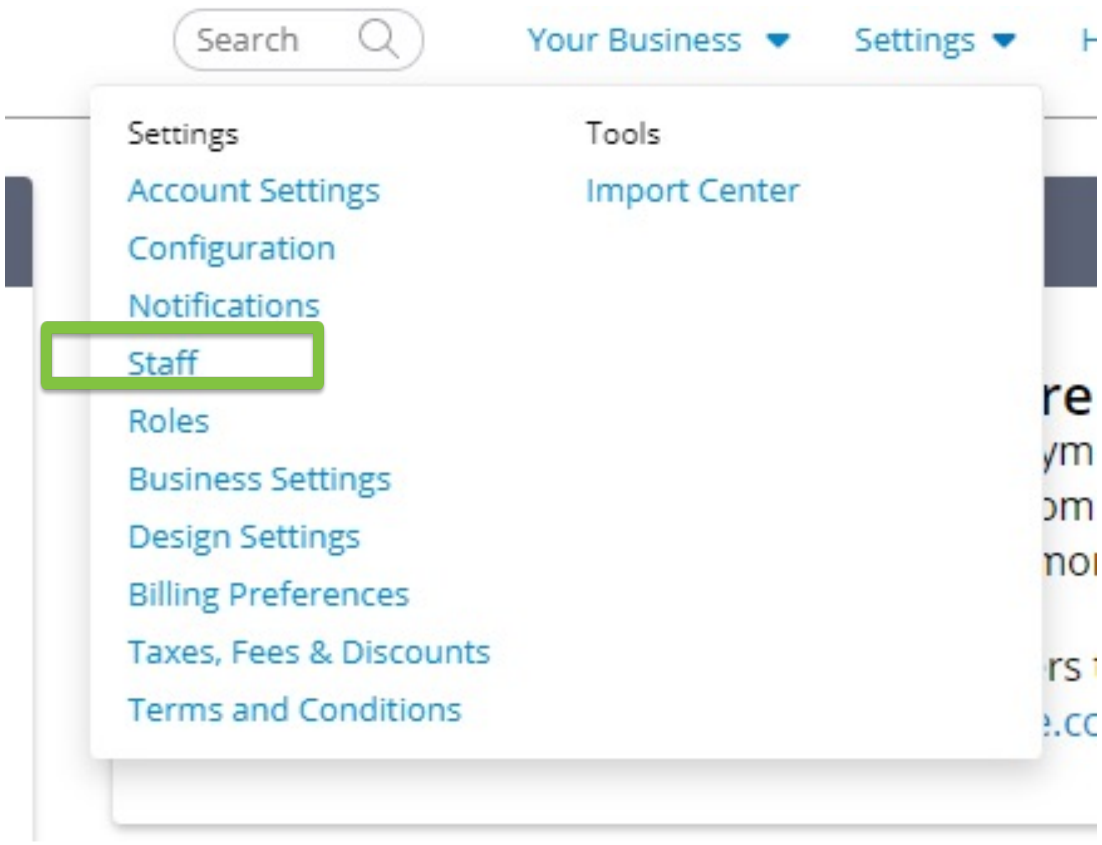


Step 3: Setup staff users

Settings > Staff

Creating additional staff users will give others within your business access to your PaySimple platform. You can add as many users as you'd like - there is no extra cost!

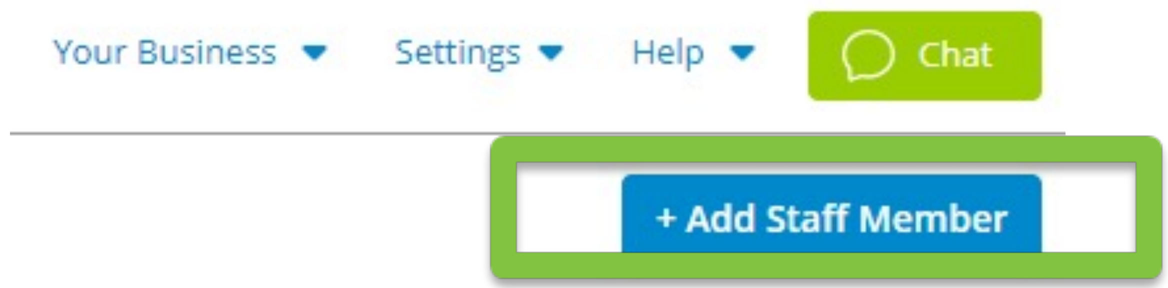
Click "Settings," then click "Staff."



Step 3: Setup staff users

Settings > Staff

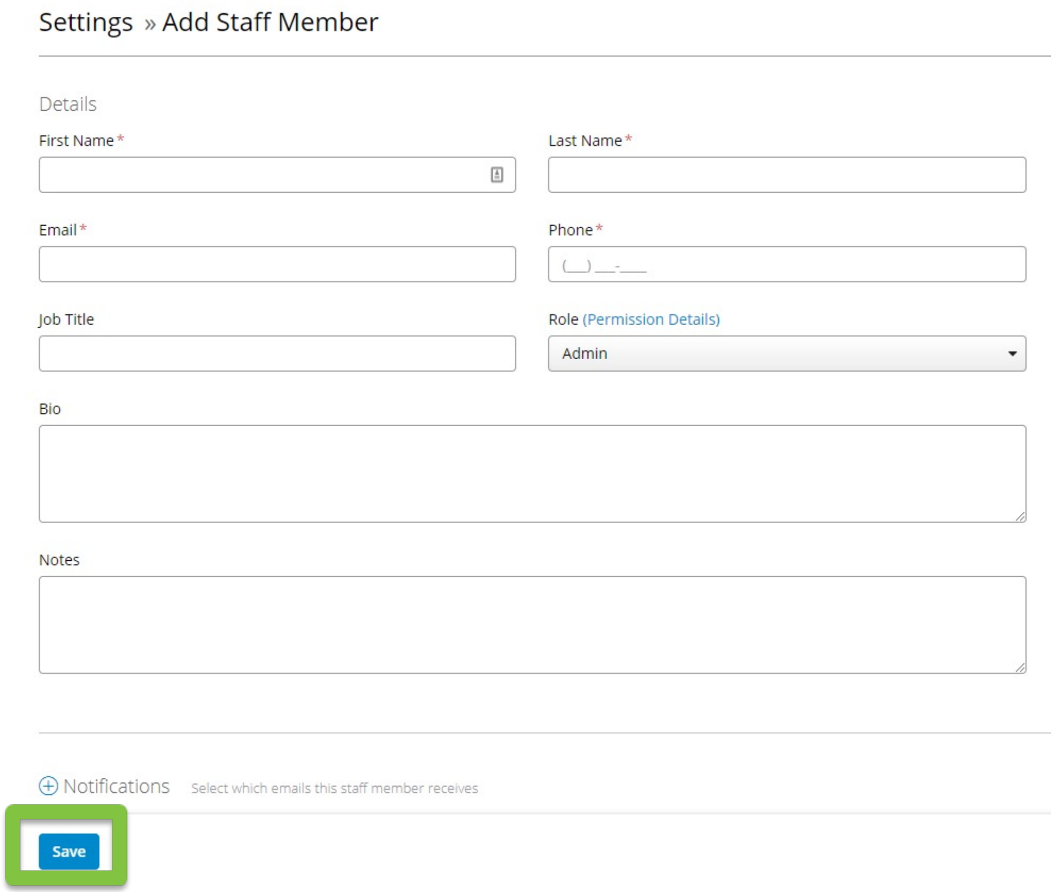
Click "+ Add Staff Member" in the upper right corner of your screen.



Step 3: Setup staff users

Settings > Staff

Add staff member details, then click “Save.”



Need more help? Click here.

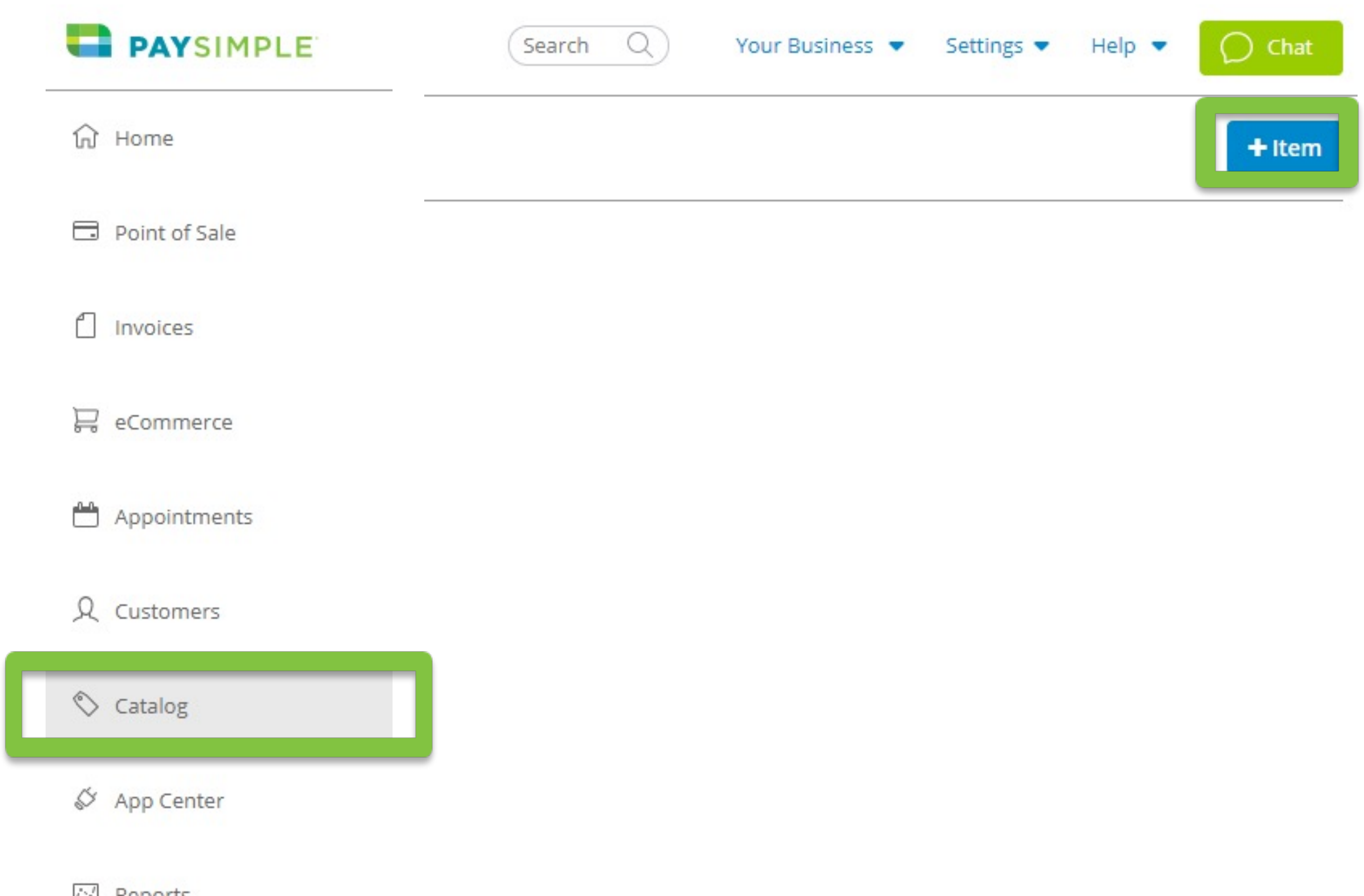
Step 4: Create Catalog Items

Catalog > + Item

You can create customized catalog items. For example, many of our MarketSharp users create a "Deposit," "Final Payment" and "Online Payment" catalog item to help easily identify what type of payment is being processed.

These catalog items are available in the mobile application to help sales reps and installers easily run payments.

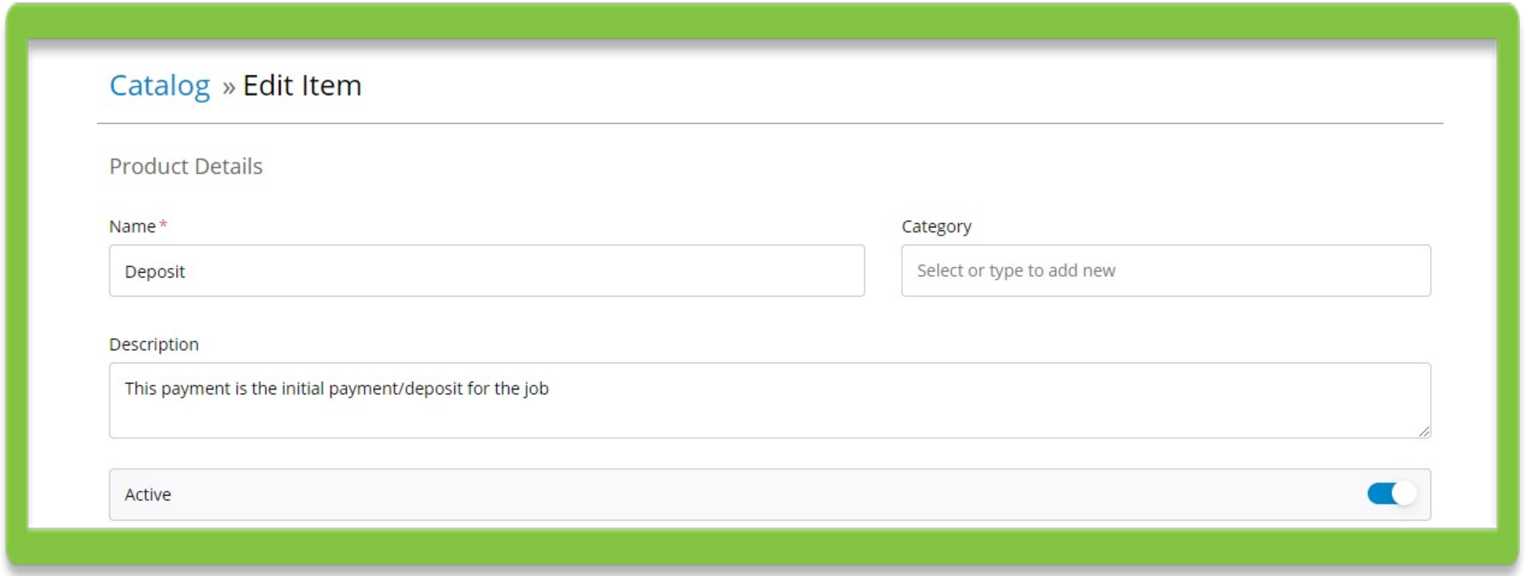
Click “Catalog” on the left menu, then click “+ Item” in the upper right corner.



Step 4: Create Catalog Items

Catalog > + Item

Enter a name for your catalog item and optional description.

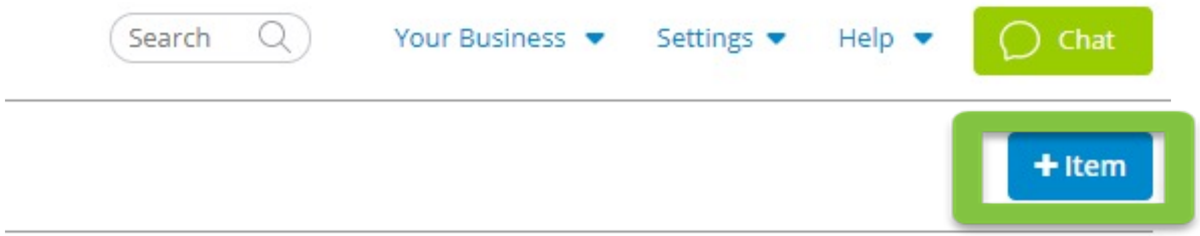


Click “Billing Structure,” then click “Price entered at checkout.”

Step 4: Create Catalog Items

Catalog > + Item

Click “Save” in the upper right corner when finished.



Repeat these steps to create a second catalog item for Final Payment, Online Payment, and/or any other types of payments.

Need more help? Click here.

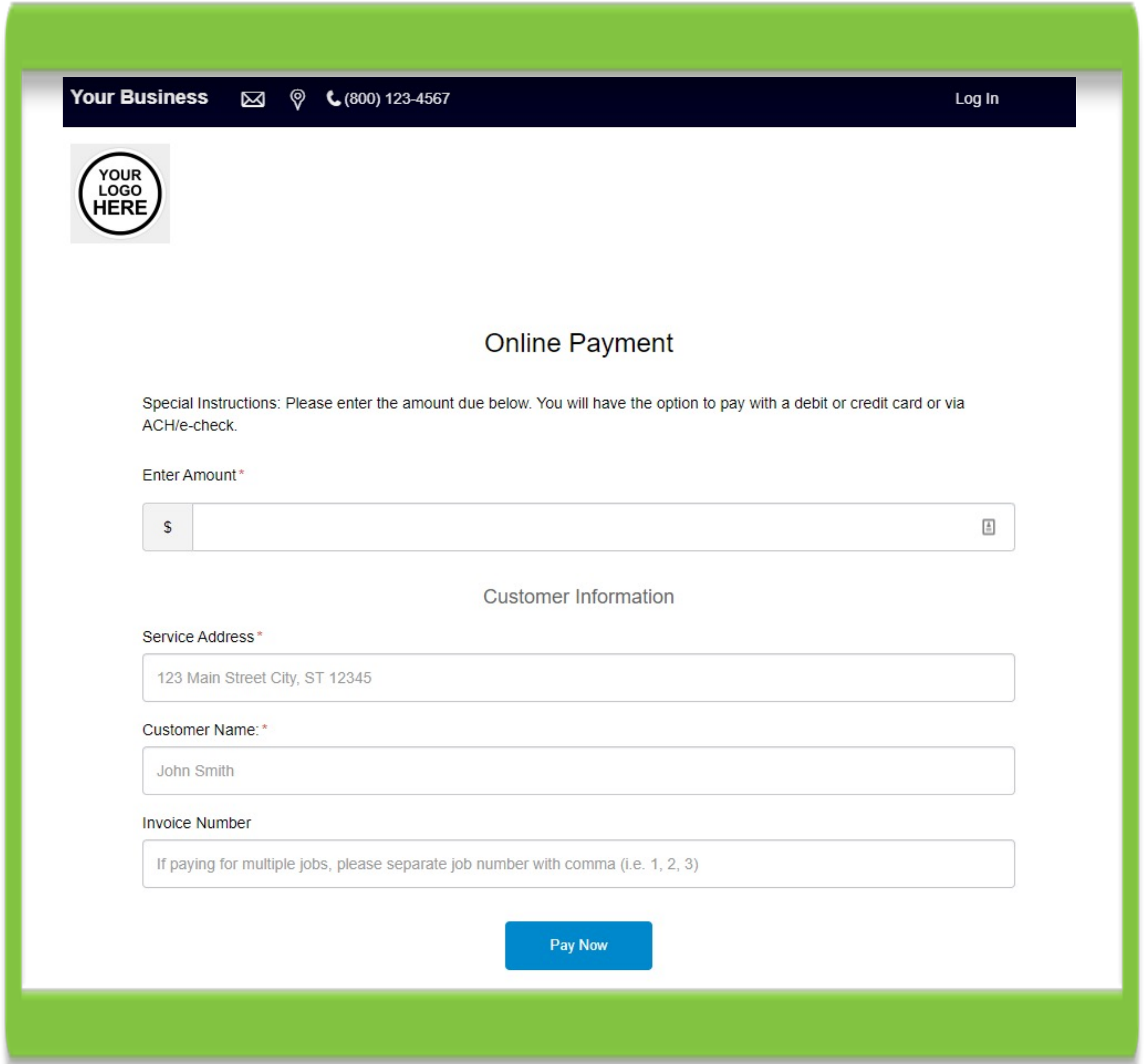
Step 5: Create payment forms

eCommerce > Payment Form

You can collect online payments 24/7 with our secure, PCI-compliant Payment Form links.

You can e-mail or text these to your customers, link them to a "Make a Payment" button on your website, or create a QR code that your customers can scan via their phones to open the link and make a payment.

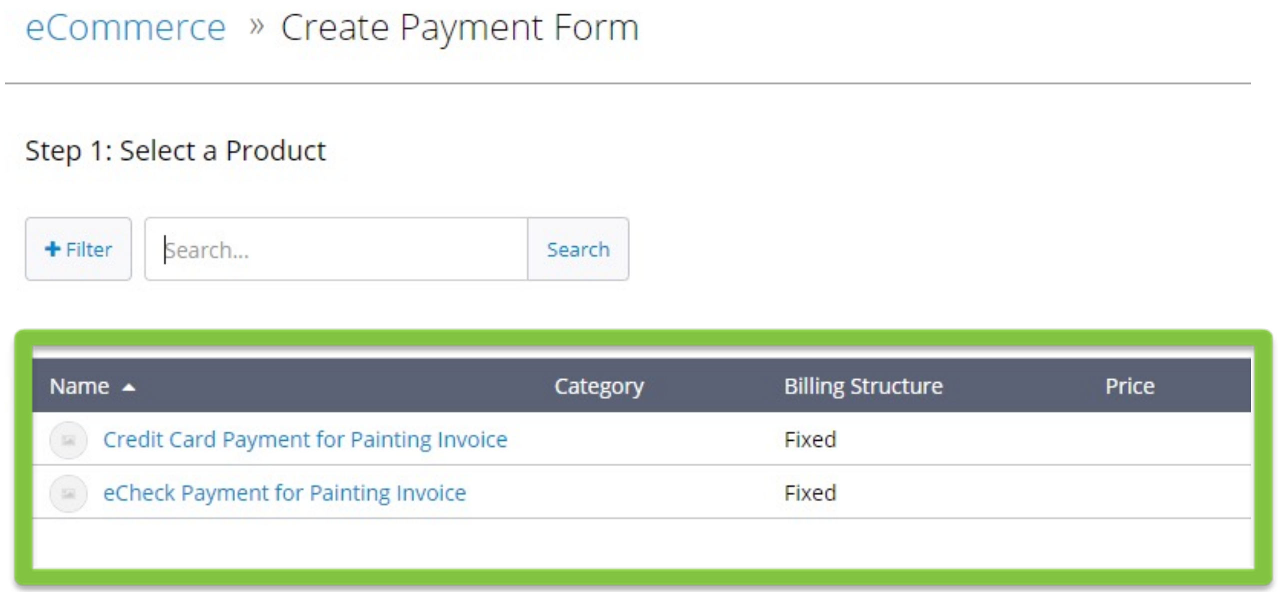
Click “eCommerce” on the left menu, then click “Create” under Payment Form.



Step 5: Create payment forms

eCommerce > Payment Form

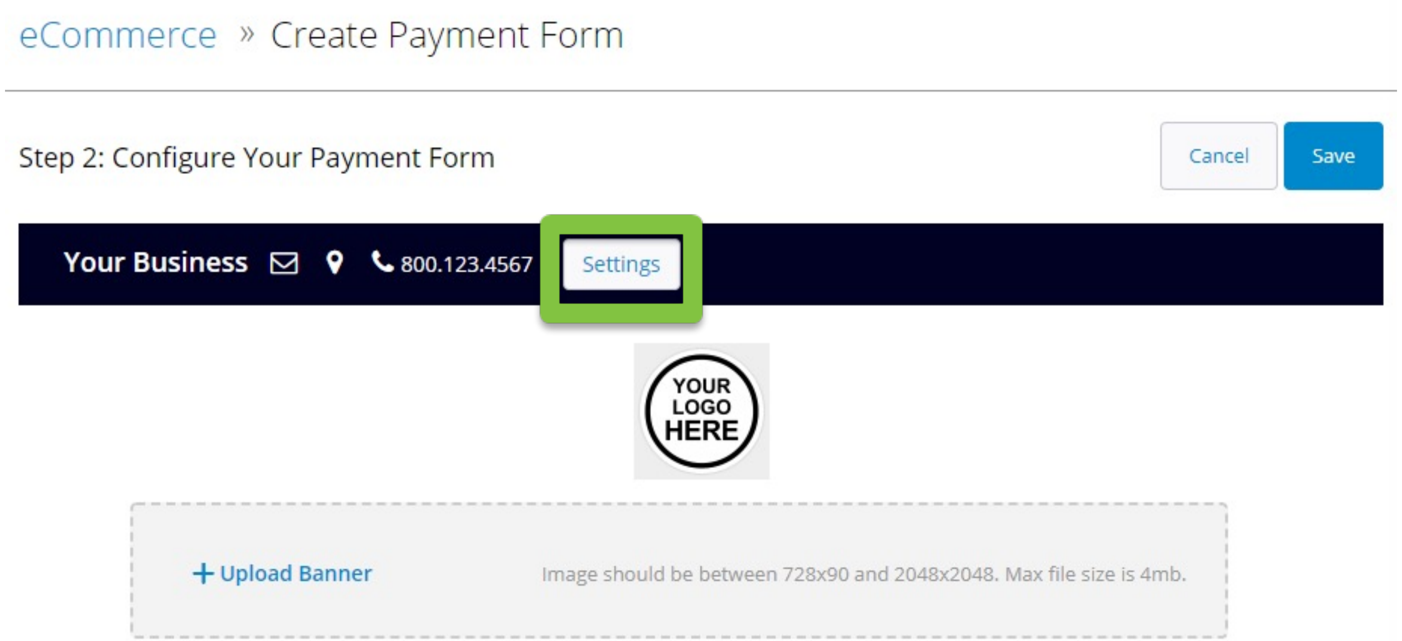
Click the name of the catalog item that you would like to create your payment form for. For example, "Online Payment."



Step 5: Create payment forms

eCommerce > Payment Form

Click "Settings" in the top banner.

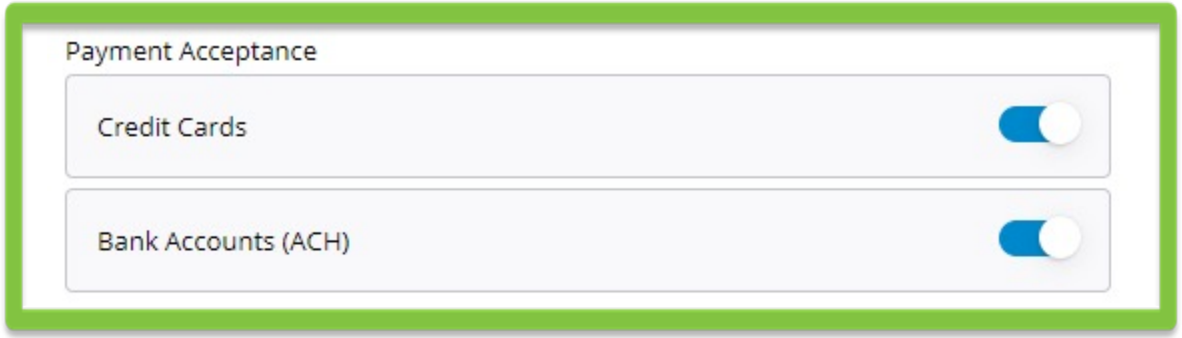


Step 5: Create payment forms

eCommerce > Payment Form

Click the radio button next to each of the payment methods to allow customers to pay via credit card and eCheck (ACH).

*You will not see the bank account option if ACH is not yet activated on your account.



Step 5: Create payment forms

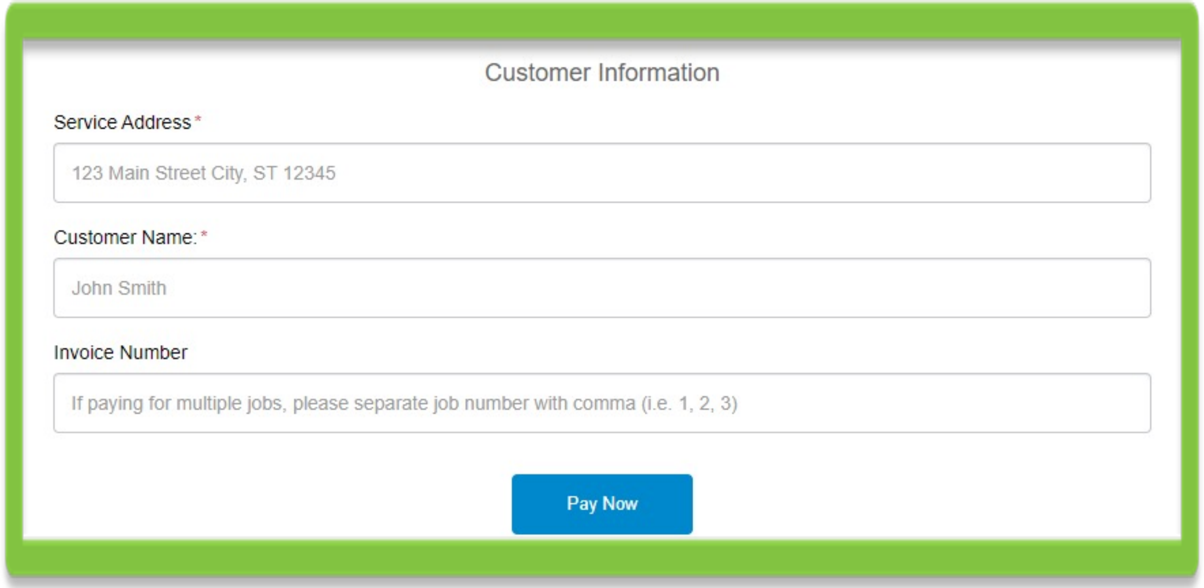
eCommerce > Payment Form

You can create custom fields on your payment form to help you easily identify who is paying and what job the payment is for.

For example:

- Service Address
- Job Number
- Invoice number

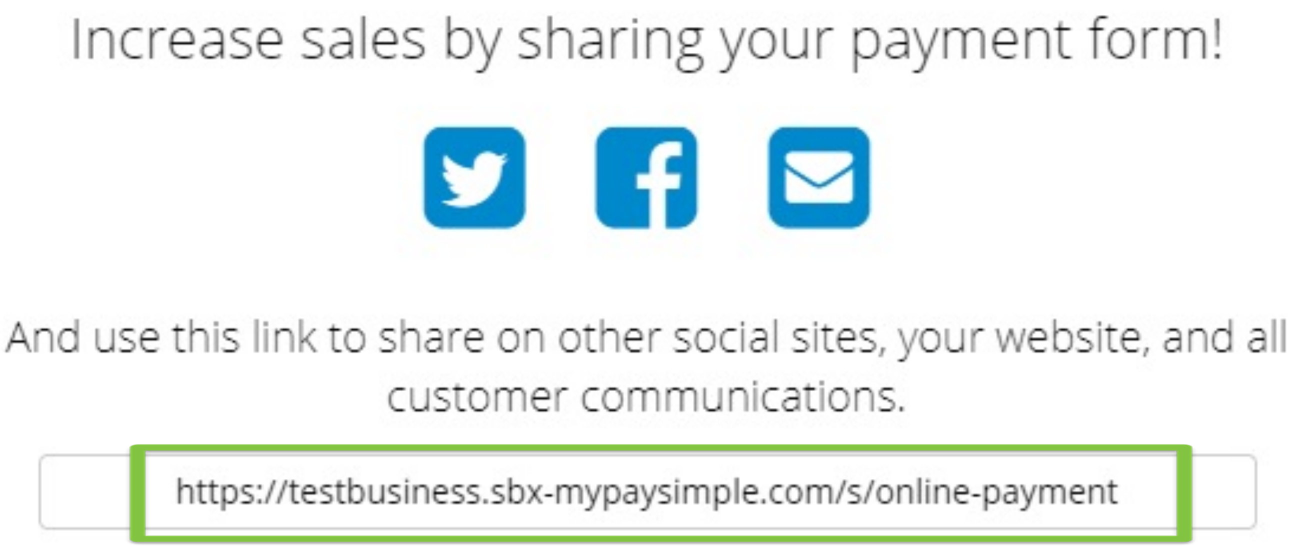
How to Create Custom Fields to Include on Your Payment Forms



Step 5: Create payment forms

eCommerce > Payment Form

Once saved, your Payment Form link is live and ready to share! We recommend copy and pasting your link somewhere, so you'll have quick access to it.



Click "Save," then click "Save" again on the Payment Form configuration page.

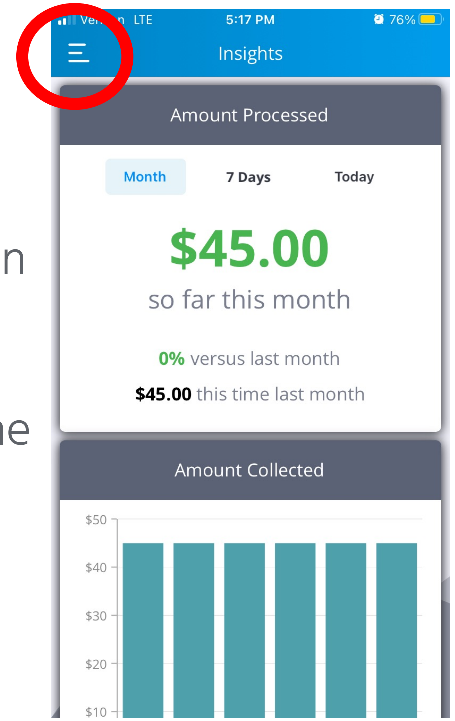
Need more help?
Click here.

Step 6: Mobile Payments

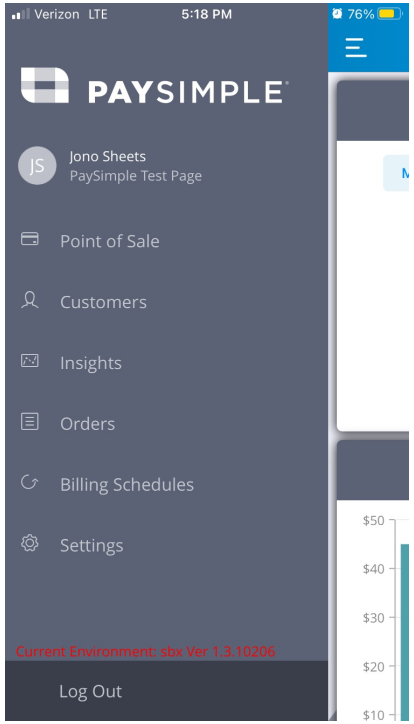
Download the PaySimple App

(Do not download AppConnect by PaySimple)

- This is the home screen
- Clicking the three horizontal bars in the upper left will open the side menu



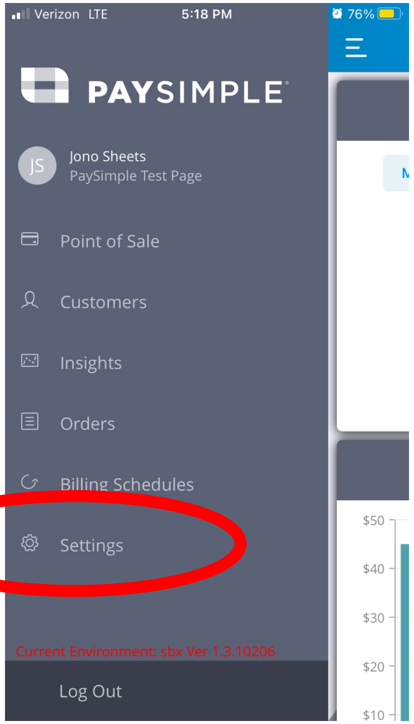
- This is the side menu where you can navigate through the many features of the PaySimple mobile app



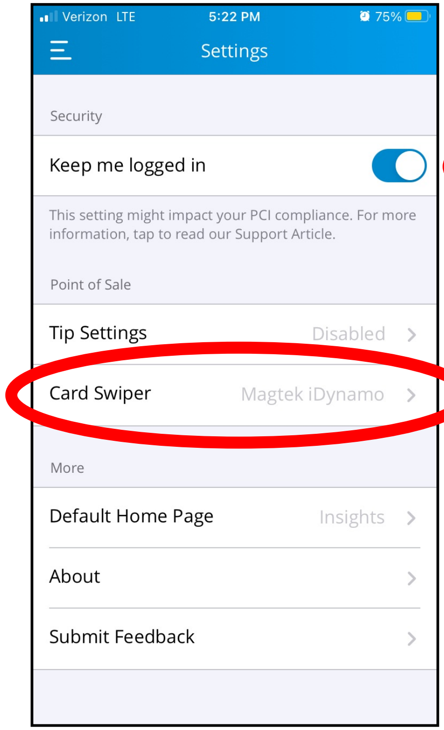
Step 6: Mobile Payments

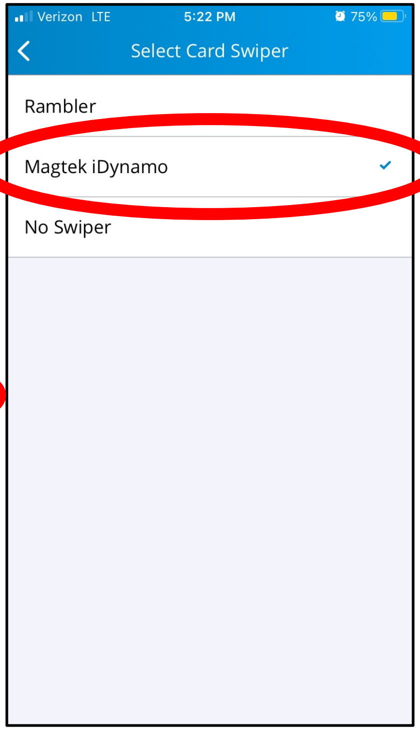
Set Card Swiper Settings

- If you are using a card swiper, ensure your settings are correct
- Click on “Settings” on the side menu



- Click on Card Swiper and select the MagTek option

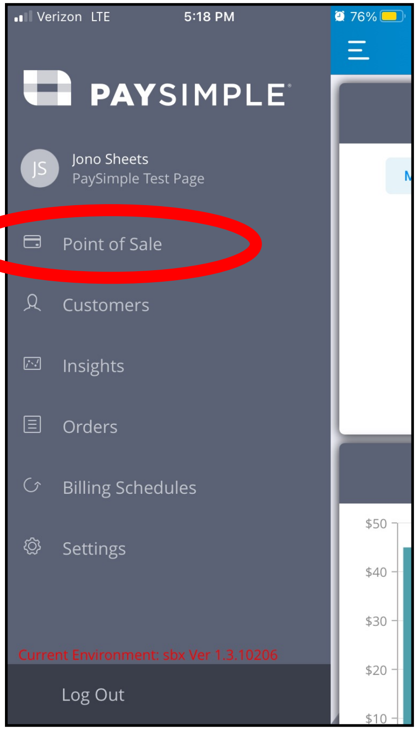




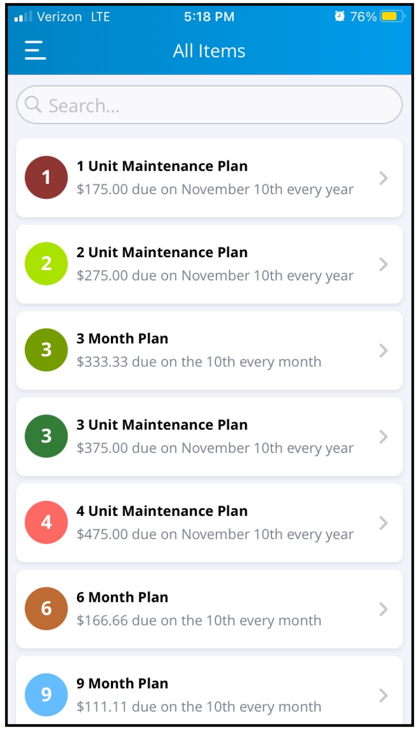
Step 6: Mobile Payments

Processing a Payment

- Select "Point of Sale" on the left side menu



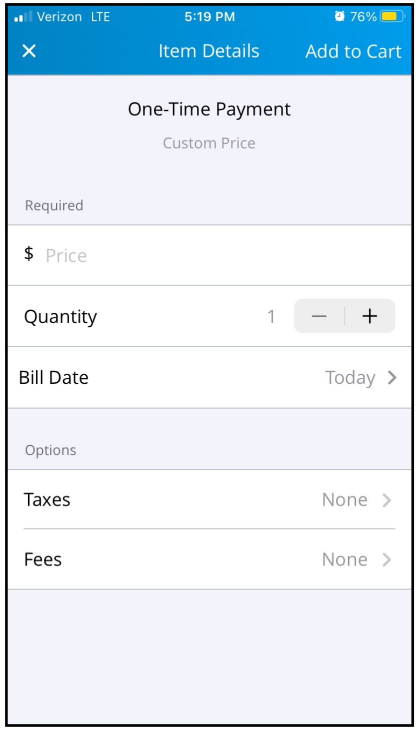
- You will see a listing of your catalog items. Tap the catalog item you will be taking a payment for



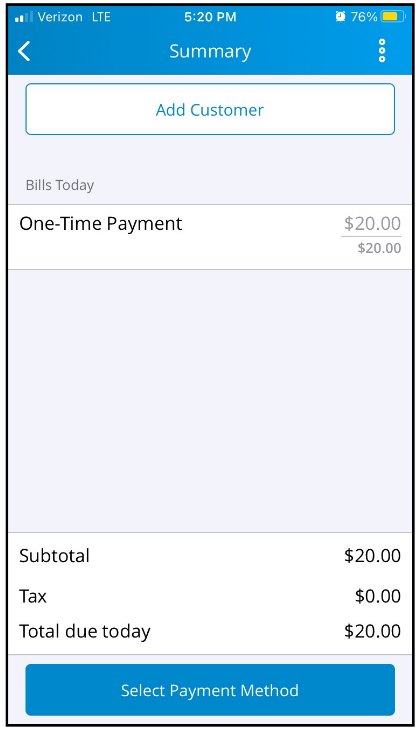
Step 6: Mobile Payments

Processing a Payment

- Enter pricing details



- If payer is a repeat customer, select “Add Customer” and search for their name. Previous payment method will auto apply
- If new customer, tap the “Select Payment Method” button



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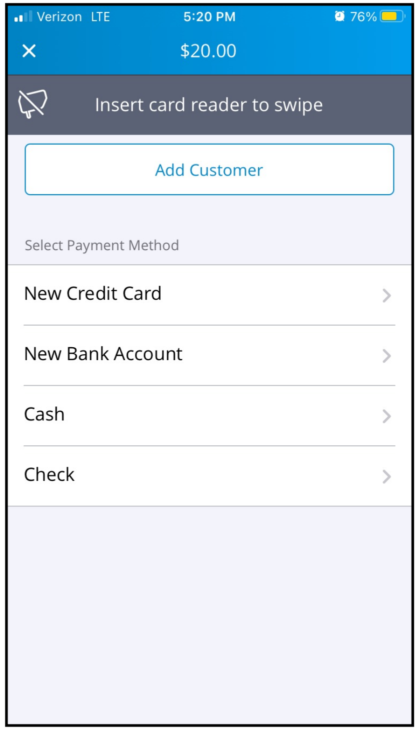
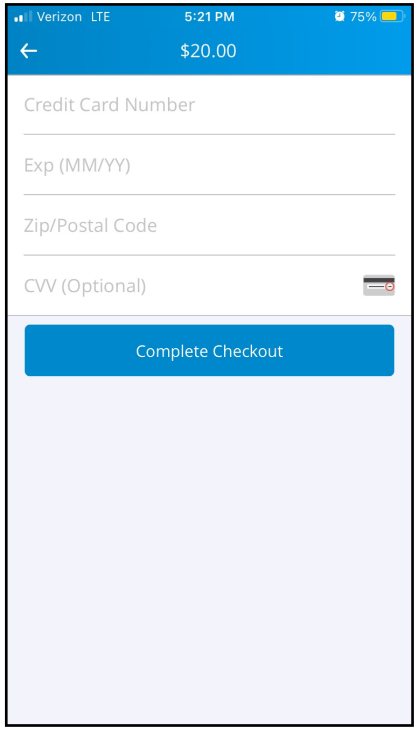
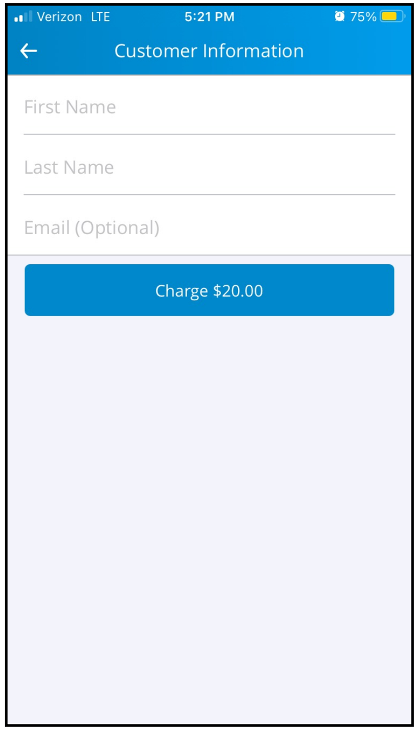
Step 6: Mobile Payments

Processing a Payment

- Select Payment Method







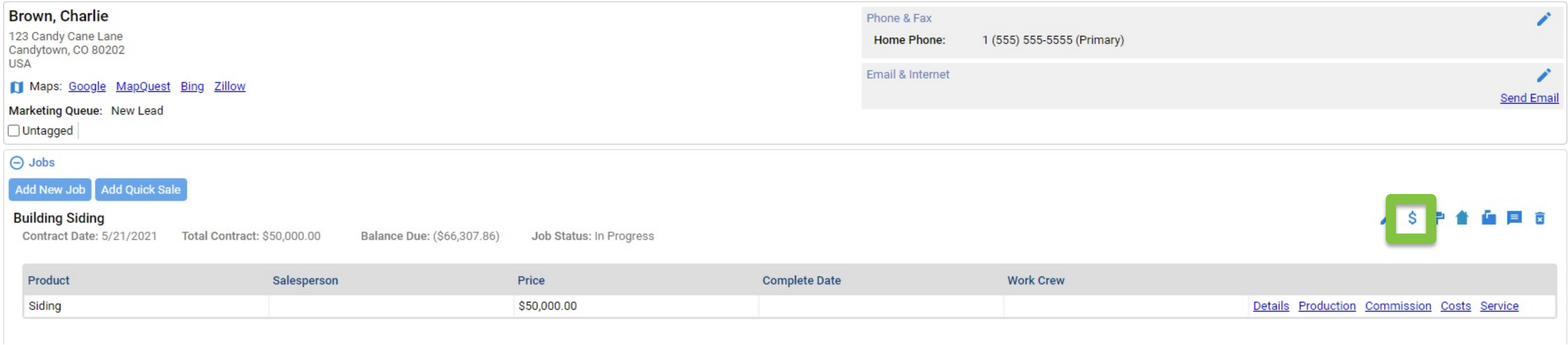
- Enter Payment Details
- Tapping "Complete Checkout" will charge the customer

Managing Payments in MarketSharp

How to Process Payments in MarketSharp

You can process both credit card and eCheck payments from directly within your MarketSharp platform.

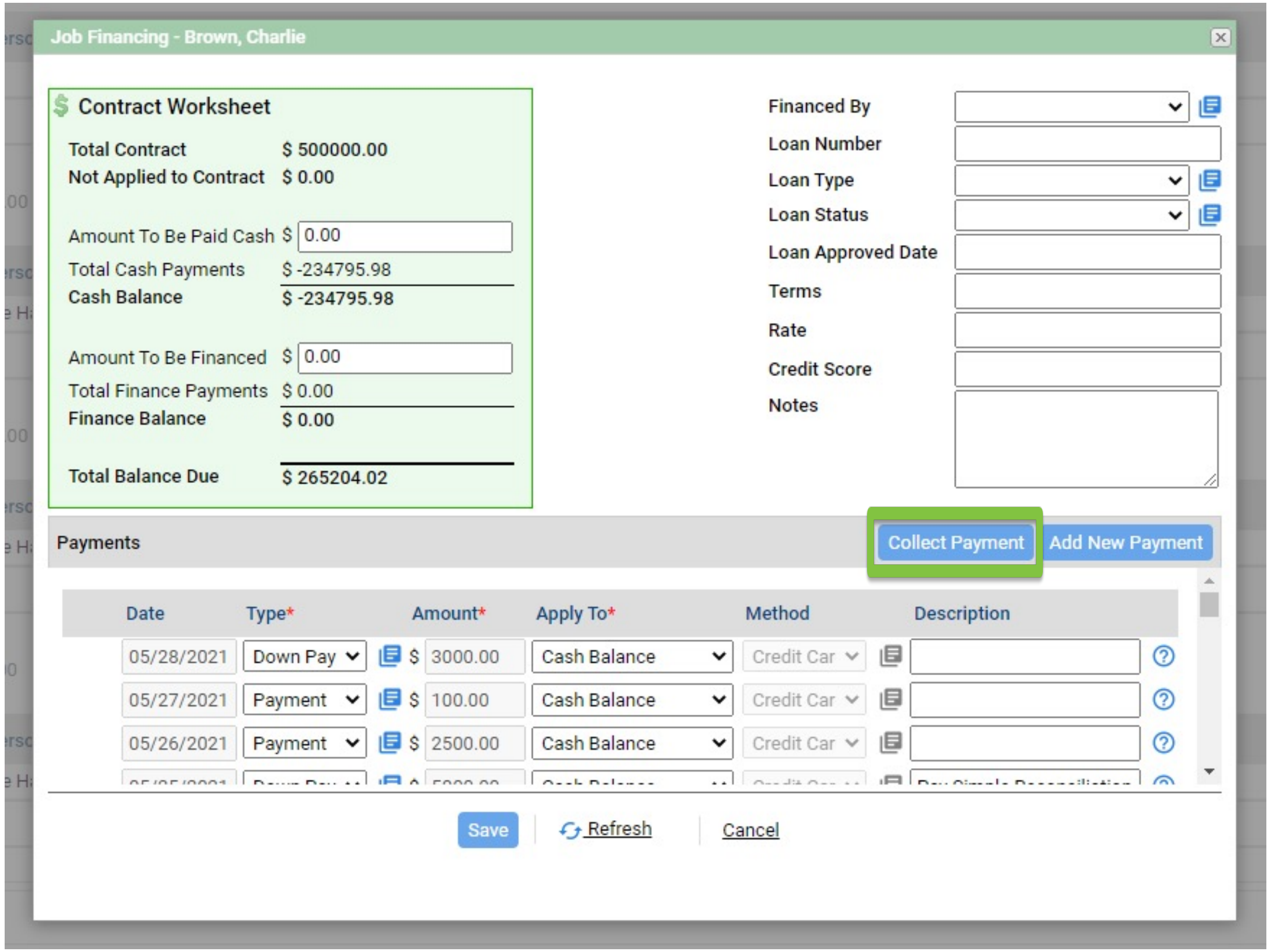
Step 1: Locate job
Step 2: Click the dollar sign to open payment window



How to Process Payments in MarketSharp

In the payment window, you can see total contract amount, payment history (if any), balance due, etc.

Step 3: Hit "Collect Payment"

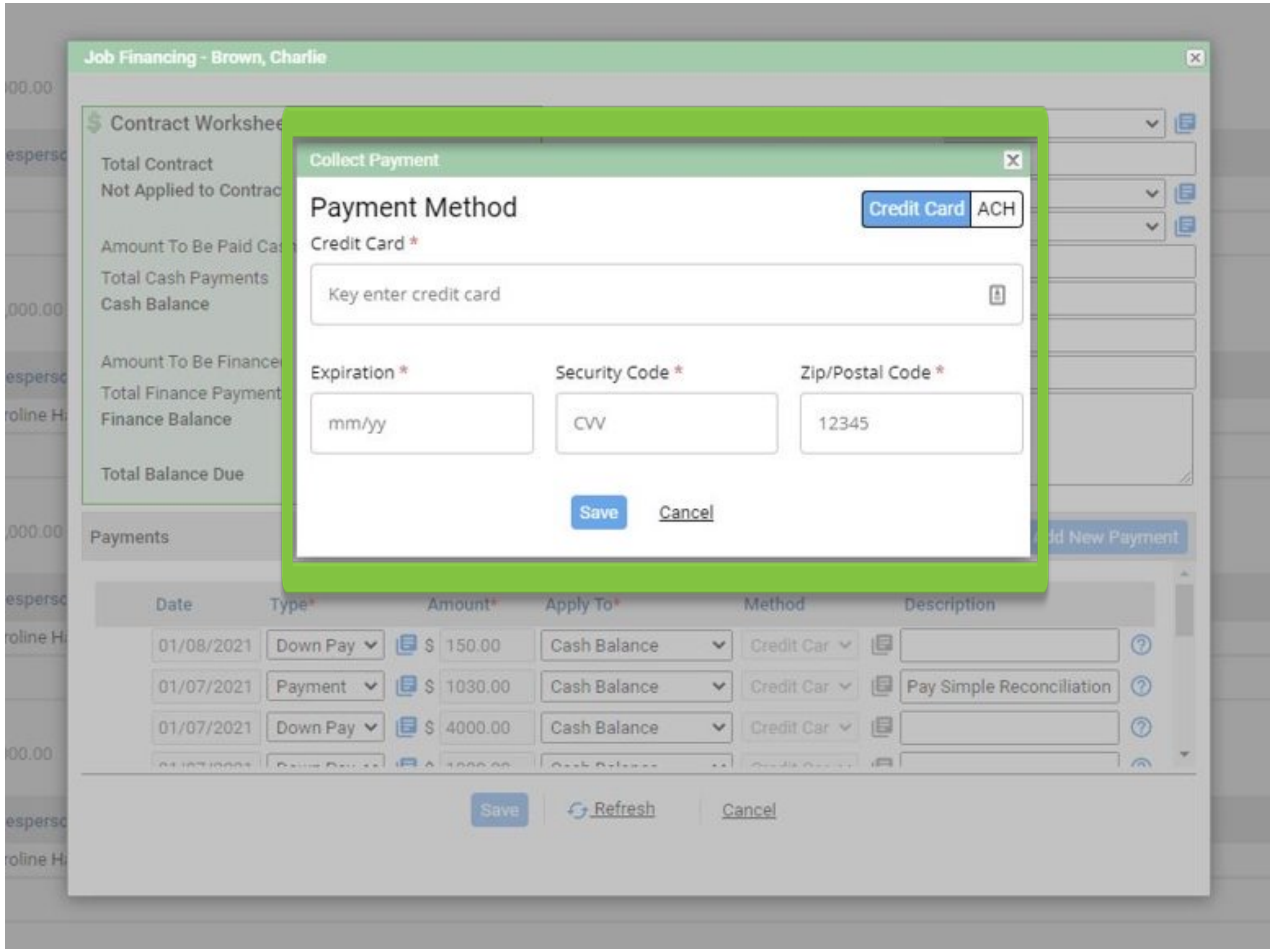


How to Process Payments in MarketSharp

Step 4: Type in Credit Card information.

You will need card number, expiration, security code, and zip code.

If you are also approved for ACH/eCheck processing, you can process an eCheck by clicking the "ACH" button in the top right corner.



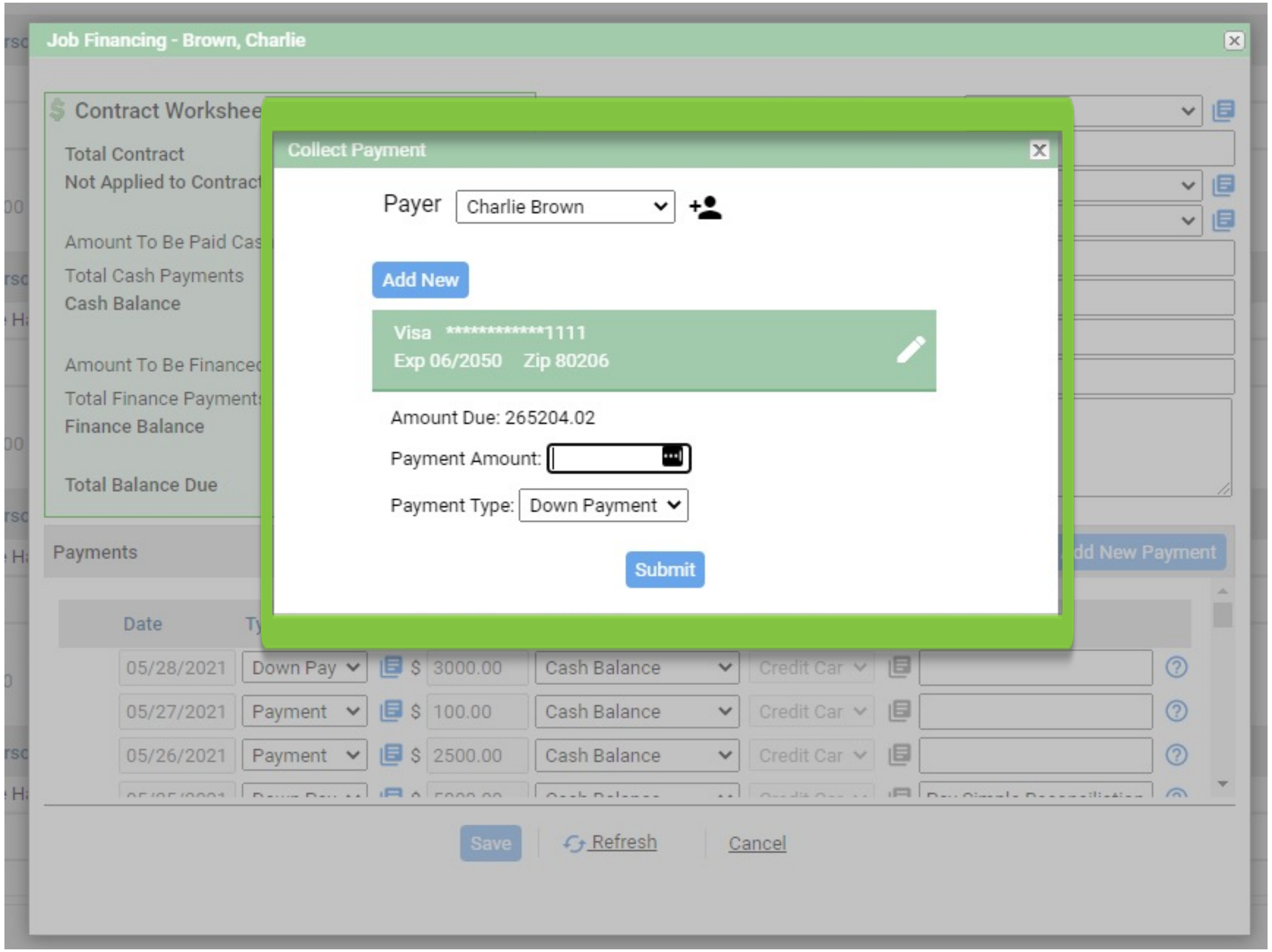
How to Process Payments in MarketSharp

Step 5: Type in payment amount.

Click "Submit" to run payment.

Payment methods can be stored on file securely, making it easy to run final balances.

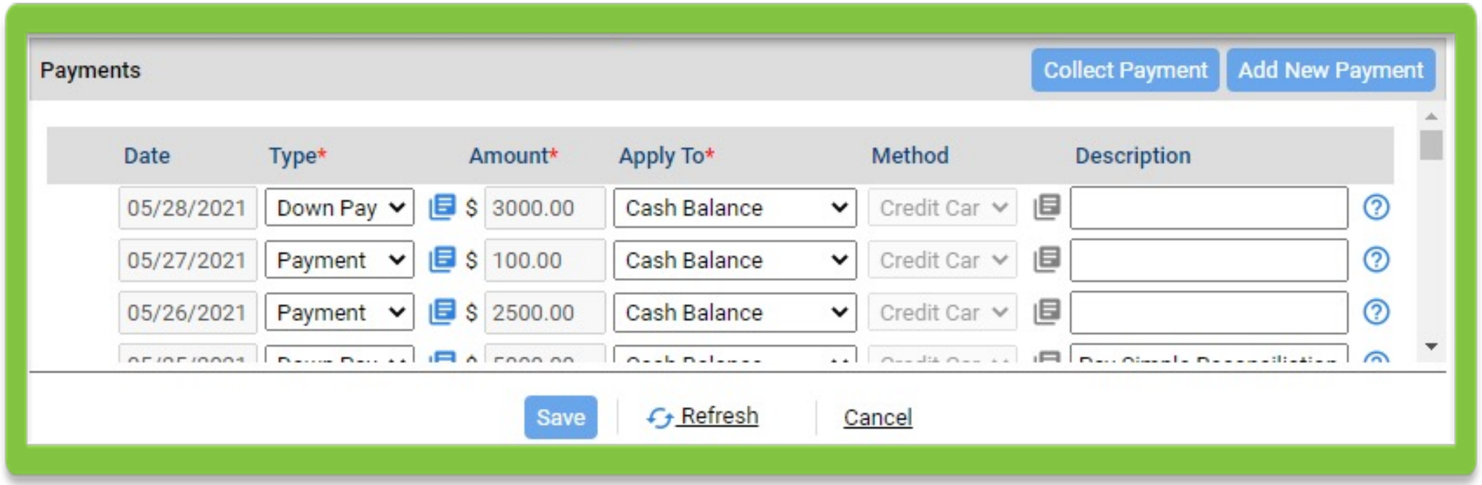
*Full card or bank details will never be visible. These are all encrypted for your customer's protection.



How to Process Payments in MarketSharp

Once the payment has been processed, you will get immediate feedback that the transaction was successful or not.

The payment will now be listed in payment history automatically, and the total balance due will be updated.



Additional Resources

- PaySimple Payments Manager is an easy way to reconcile payments that are made through PaySimple. The Payments Manager grabs all the payments made through PaySimple and puts them into MarketSharp for you to reconcile.

- Unlink PaySimple Payments

- PaySimple – MarketSharp Resource Page

Contact Us

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