

MarketSharp Onboarding Guide

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

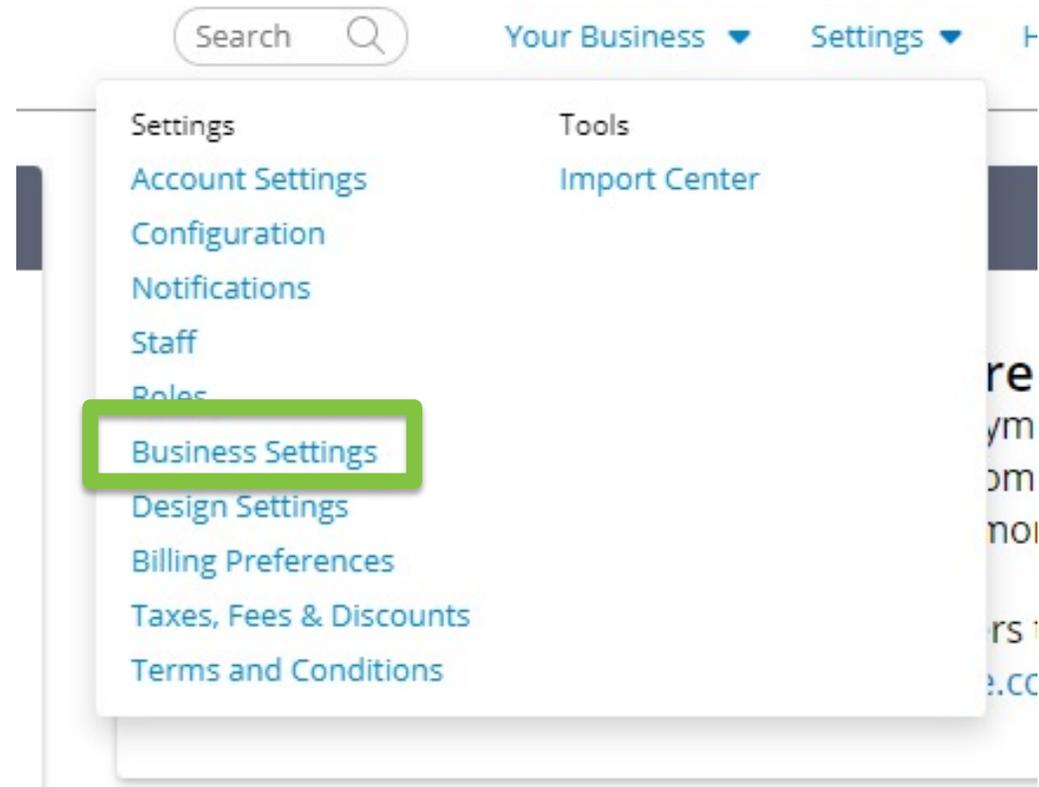
1. How to customize your business information
2. How to add staff
3. How to create catalog items
4. How to enable Online Payments
5. How to utilize the PaySimple mobile app
6. Processing payments within your MarketSharp CRM

Step 1: Update your business information

Settings > Business Settings

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.

Click "Settings," then click "Business Settings."



Step 1: Update your business information

Settings > Business Settings

Edit your information, then click “Save.”

Settings » Business Settings

Business Details

Business Name * ⓘ

Address 1 * ⓘ **Address 2**

Zip * **City *** **State *** **Time Zone ***

Contact Information

Custom URL * ⓘ **Contact Email ***

Website **Contact Phone Number ***

Social Media

Twitter Profile  **Facebook Page**  **Yelp Page** 

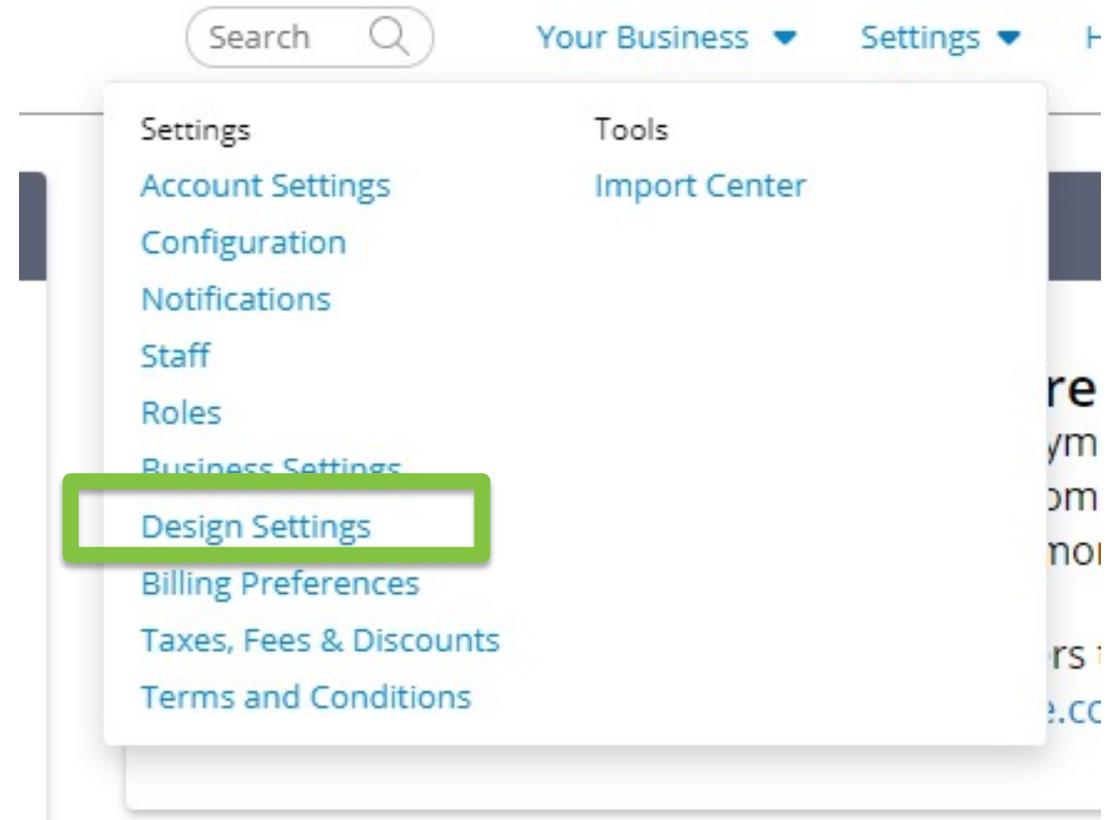
Save

Step 2: Customize branding

Settings > Design Settings

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

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

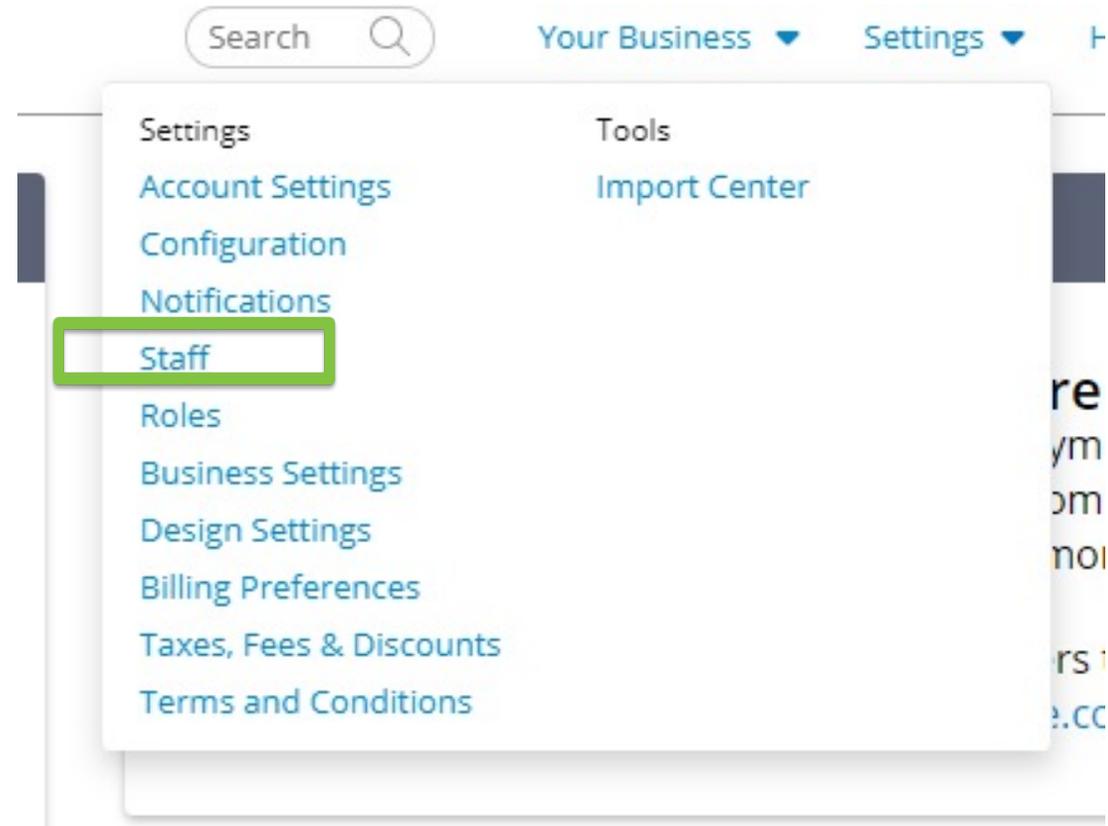


Step 3: Setup staff users

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!

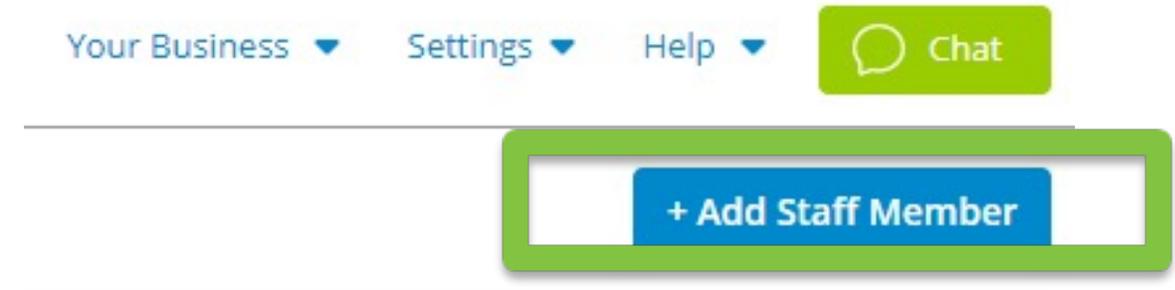
Click "Settings," then click "Staff."



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.”

Settings » Add Staff Member

Details

First Name *

Last Name *

Email *

Phone *

Job Title

Role (Permission Details)

Bio

Notes

⊕ Notifications Select which emails this staff member receives



Need more help? Click [here](#).

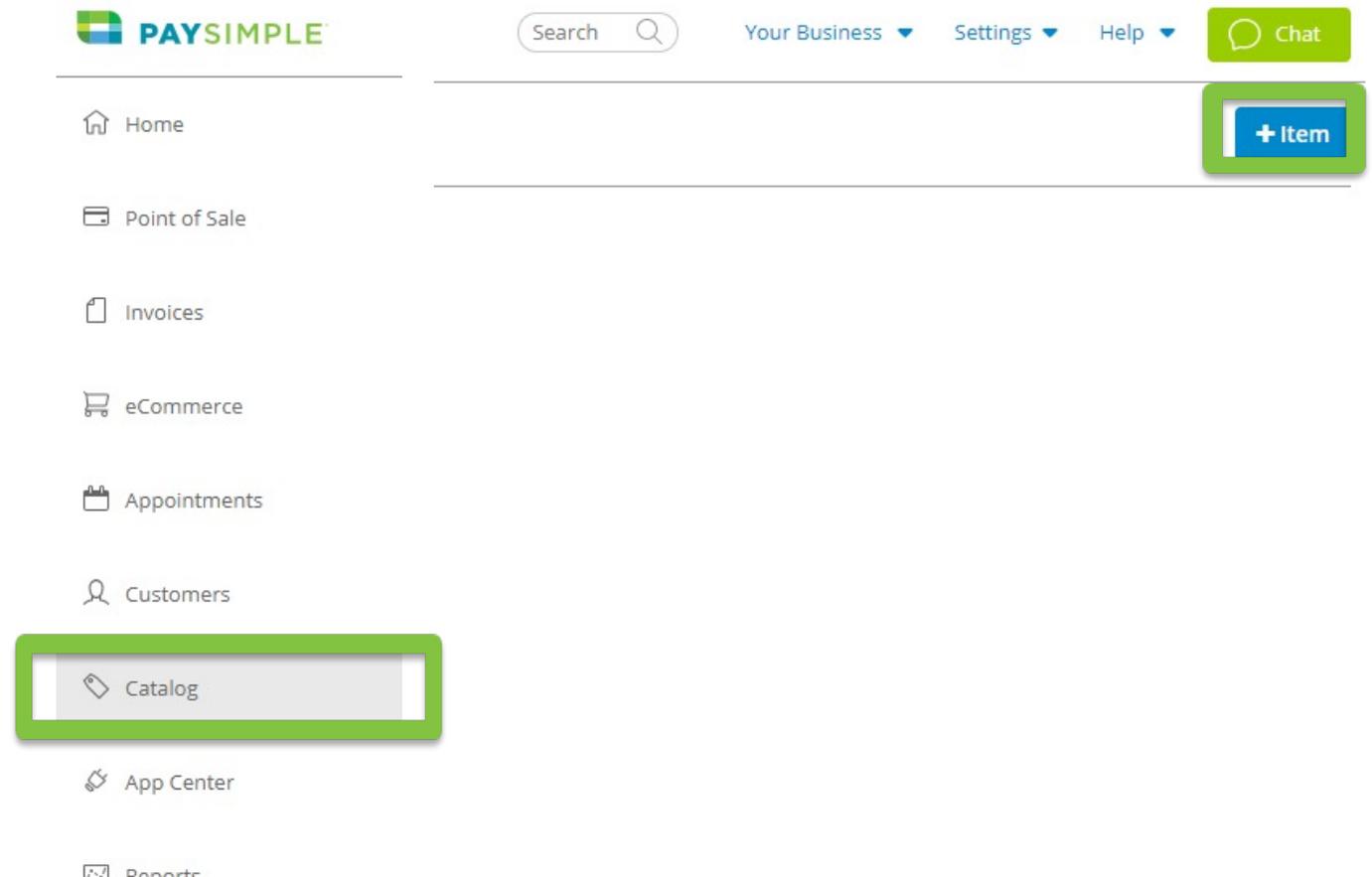
Step 4: Create Catalog Items

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.

Catalog » Edit Item

Product Details

Name* Category

Description

Active

Click "Billing Structure," then click "Price entered at checkout."

⊖ Billing Structure

Fixed Recurring

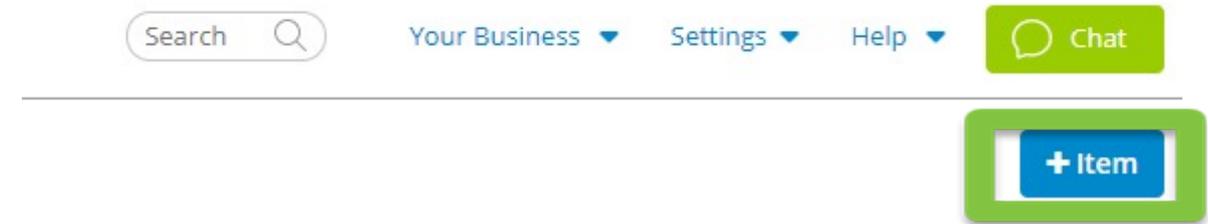
Preset price

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](#).

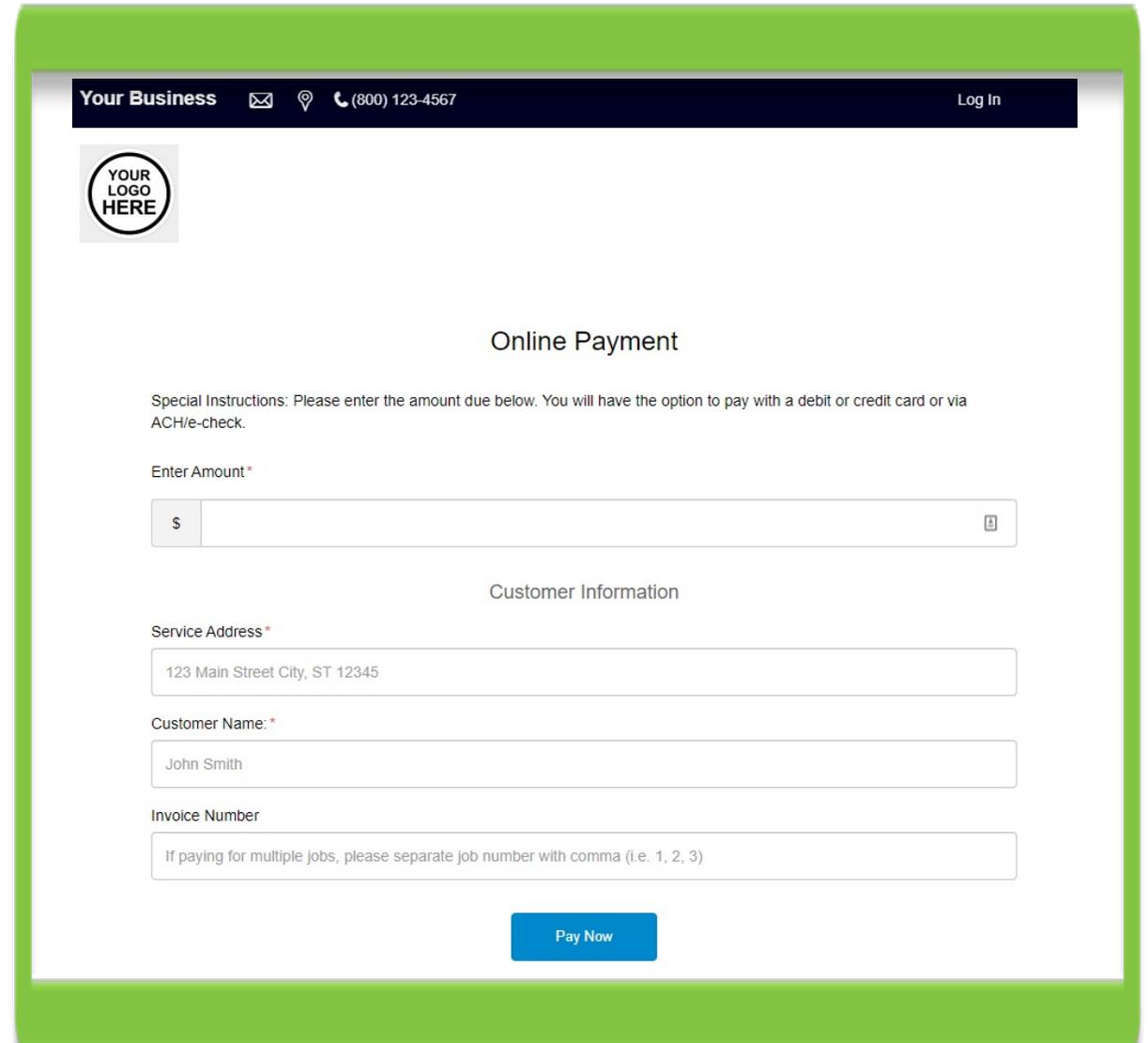
Step 5: Create payment forms

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.



The screenshot shows a mobile-style payment form with a green border. At the top, a dark blue header contains the text "Your Business" followed by icons for email, location, and phone, and the phone number "(800) 123-4567". A "Log In" link is on the right. Below the header is a circular logo placeholder with the text "YOUR LOGO HERE". The main title "Online Payment" is centered. Below it, "Special Instructions" state: "Please enter the amount due below. You will have the option to pay with a debit or credit card or via ACH/e-check." The "Enter Amount*" field includes a currency selector set to "\$" and a QR code icon. The "Customer Information" section includes a "Service Address*" field with the example "123 Main Street City, ST 12345", a "Customer Name*" field with "John Smith", and an "Invoice Number" field with the instruction "If paying for multiple jobs, please separate job number with comma (i.e. 1, 2, 3)". A blue "Pay Now" button is at the bottom.

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."

eCommerce » Create Payment Form

Step 1: Select a Product

Name ▲	Category	Billing Structure	Price
<input type="radio"/> Credit Card Payment for Painting Invoice		Fixed	
<input type="radio"/> eCheck Payment for Painting Invoice		Fixed	

Step 5: Create payment forms

eCommerce > Payment Form

Click "Settings" in the top banner.

eCommerce » Create Payment Form

Step 2: Configure Your Payment Form

Cancel

Save

Your Business    800.123.4567

Settings



+ Upload Banner

Image should be between 728x90 and 2048x2048. Max file size is 4mb.

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.



The screenshot shows a 'Payment Acceptance' section with two toggle switches. The first toggle is labeled 'Credit Cards' and is turned on. The second toggle is labeled 'Bank Accounts (ACH)' and is also turned on. The entire section is enclosed in a green border.

Payment Method	Status
Credit Cards	On
Bank Accounts (ACH)	On

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

The screenshot shows a payment form titled "Customer Information" with a green border. It contains three input fields and a "Pay Now" button. The first field is labeled "Service Address*" and contains the text "123 Main Street City, ST 12345". The second field is labeled "Customer Name: *" and contains the text "John Smith". The third field is labeled "Invoice Number" and contains the text "If paying for multiple jobs, please separate job number with comma (i.e. 1, 2, 3)". The "Pay Now" button is blue and located at the bottom right of the form.

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](#).

Increase sales by sharing your payment form!



And use this link to share on other social sites, your website, and all customer communications.

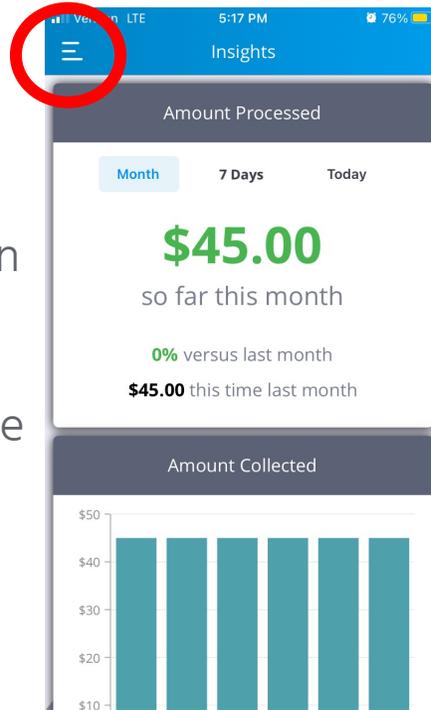
<https://testbusiness.sbx-mypaysimple.com/s/online-payment>

Step 6: Mobile Payments

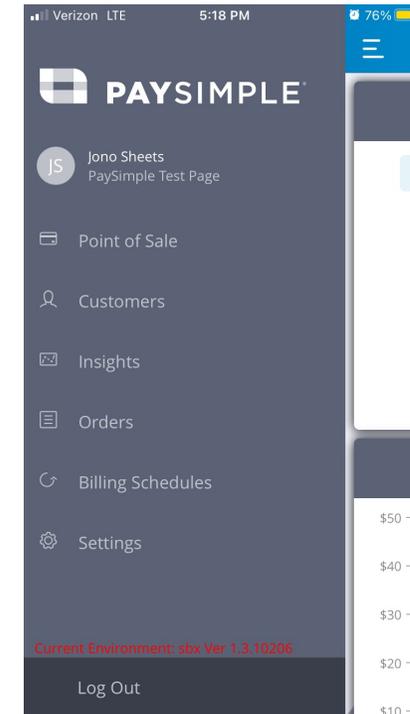
Download the PaySimple App

(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



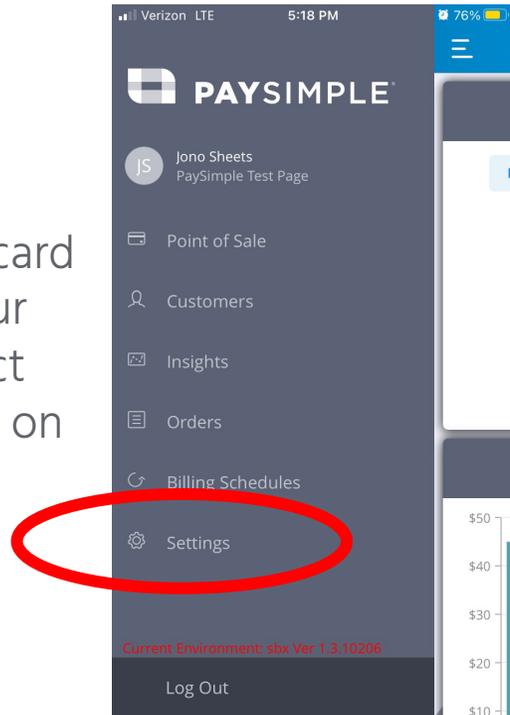
- This is the side menu where you can navigate through the many features of the PaySimple mobile app



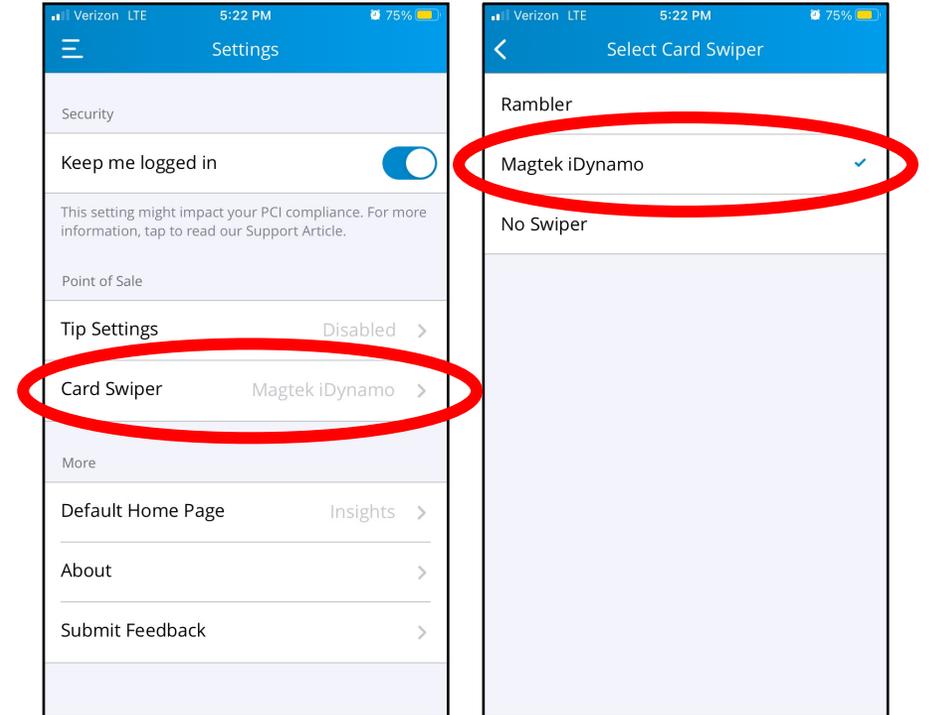
Step 6: Mobile Payments

Set Card Swiper Settings

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



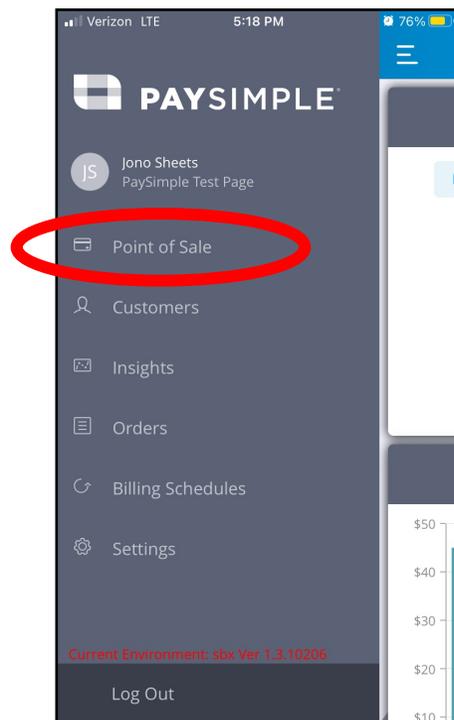
- Click on Card Swiper and select the MagTek option



Step 6: Mobile Payments

Processing a Payment

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



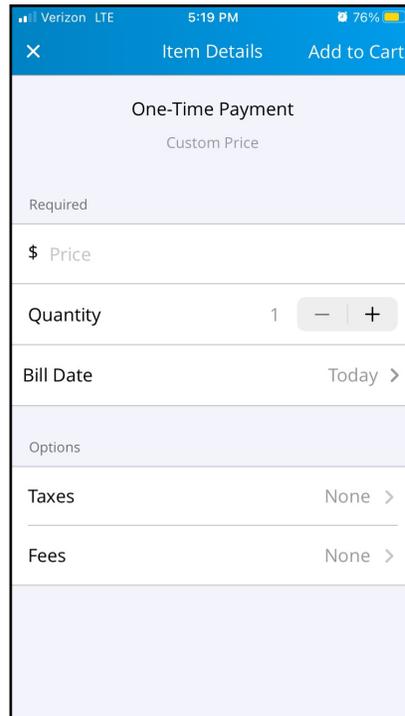
- You will see a listing of your catalog items. Tap the catalog item you will be taking a payment for



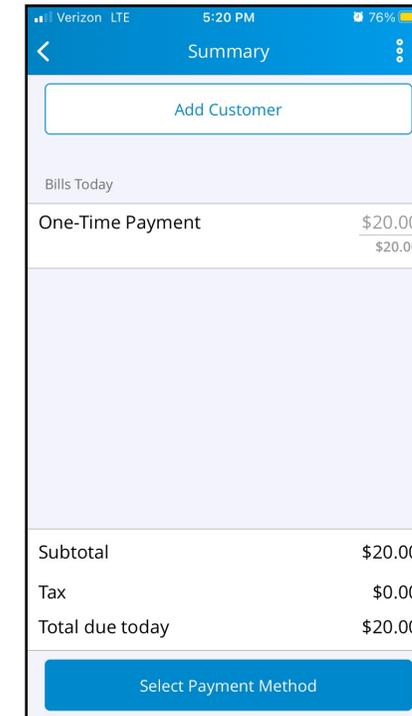
Step 6: Mobile Payments

Processing a Payment

- Enter pricing details



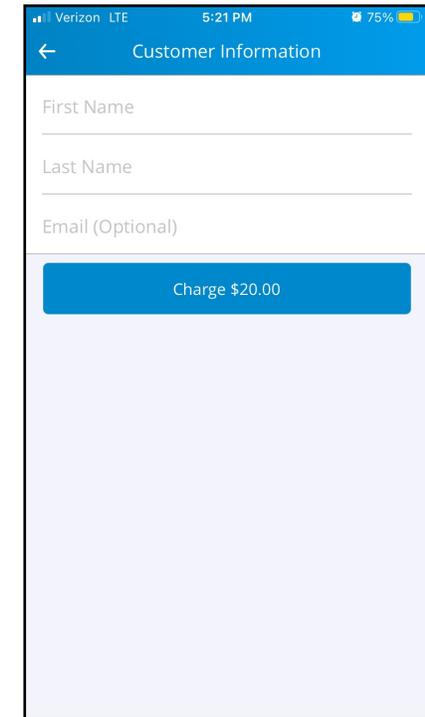
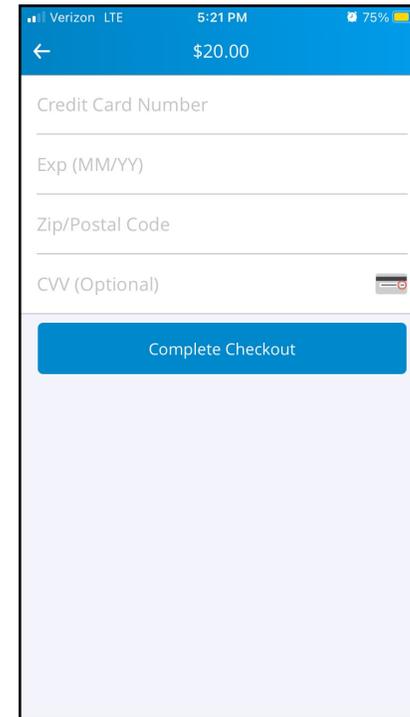
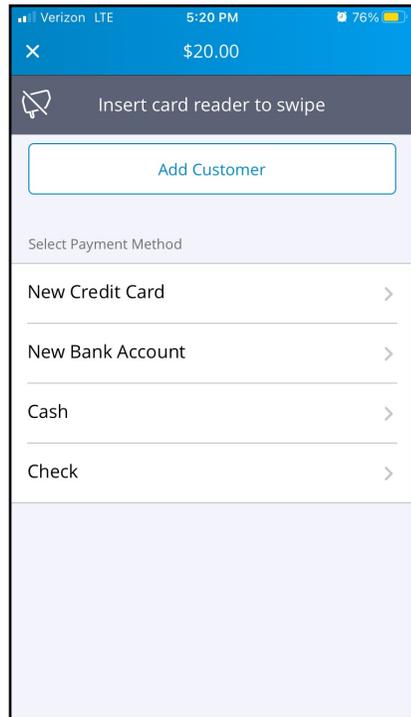
- If payer is a repeat customer, select “Add Customer” and search for their name. Previous payment method will auto apply
- If new customer, tap the “Select Payment Method” button



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

Brown, Charlie
 123 Candy Cane Lane
 Candytown, CO 80202
 USA

Maps: [Google](#) [MapQuest](#) [Bing](#) [Zillow](#)

Marketing Queue: New Lead

Untagged

Phone & Fax 

Home Phone: 1 (555) 555-5555 (Primary)

Email & Internet 

[Send Email](#)

Jobs

[Add New Job](#) [Add Quick Sale](#)

Building Siding 

Contract Date: 5/21/2021 Total Contract: \$50,000.00 Balance Due: (\$66,307.86) Job Status: In Progress

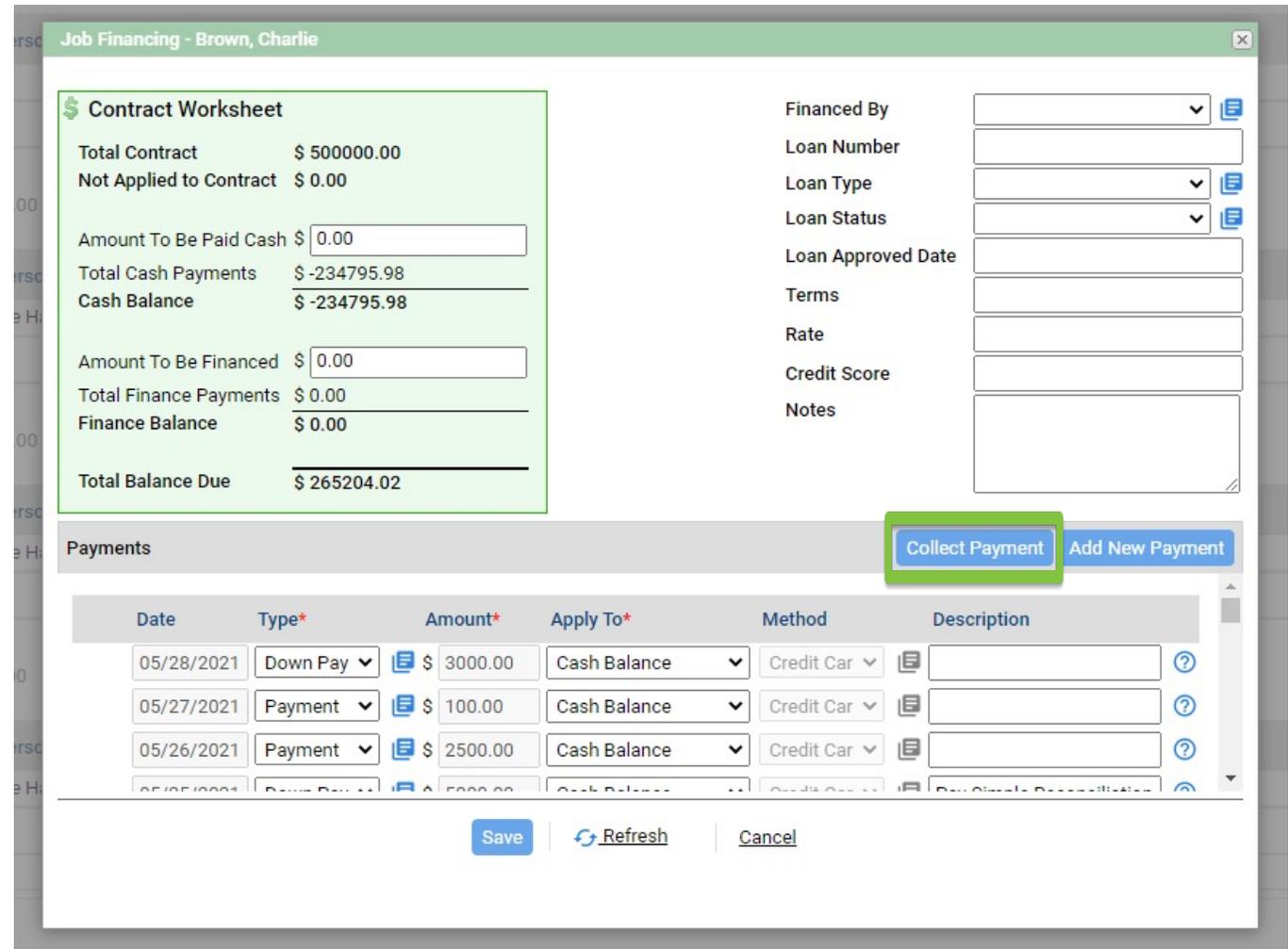
Product	Salesperson	Price	Complete Date	Work Crew
Siding		\$50,000.00		

[Details](#) [Production](#) [Commission](#) [Costs](#) [Service](#)

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"



Job Financing - Brown, Charlie

Contract Worksheet

Total Contract	\$ 500000.00
Not Applied to Contract	\$ 0.00
Amount To Be Paid Cash	\$ 0.00
Total Cash Payments	\$ -234795.98
Cash Balance	\$ -234795.98
Amount To Be Financed	\$ 0.00
Total Finance Payments	\$ 0.00
Finance Balance	\$ 0.00
Total Balance Due	\$ 265204.02

Financed By:
 Loan Number:
 Loan Type:
 Loan Status:
 Loan Approved Date:
 Terms:
 Rate:
 Credit Score:
 Notes:

Payments

Date	Type*	Amount*	Apply To*	Method	Description
05/28/2021	Down Pay	\$ 3000.00	Cash Balance	Credit Car	
05/27/2021	Payment	\$ 100.00	Cash Balance	Credit Car	
05/26/2021	Payment	\$ 2500.00	Cash Balance	Credit Car	
05/25/2021	Down Pay	\$ 5000.00	Cash Balance	Credit Car	Down Payment

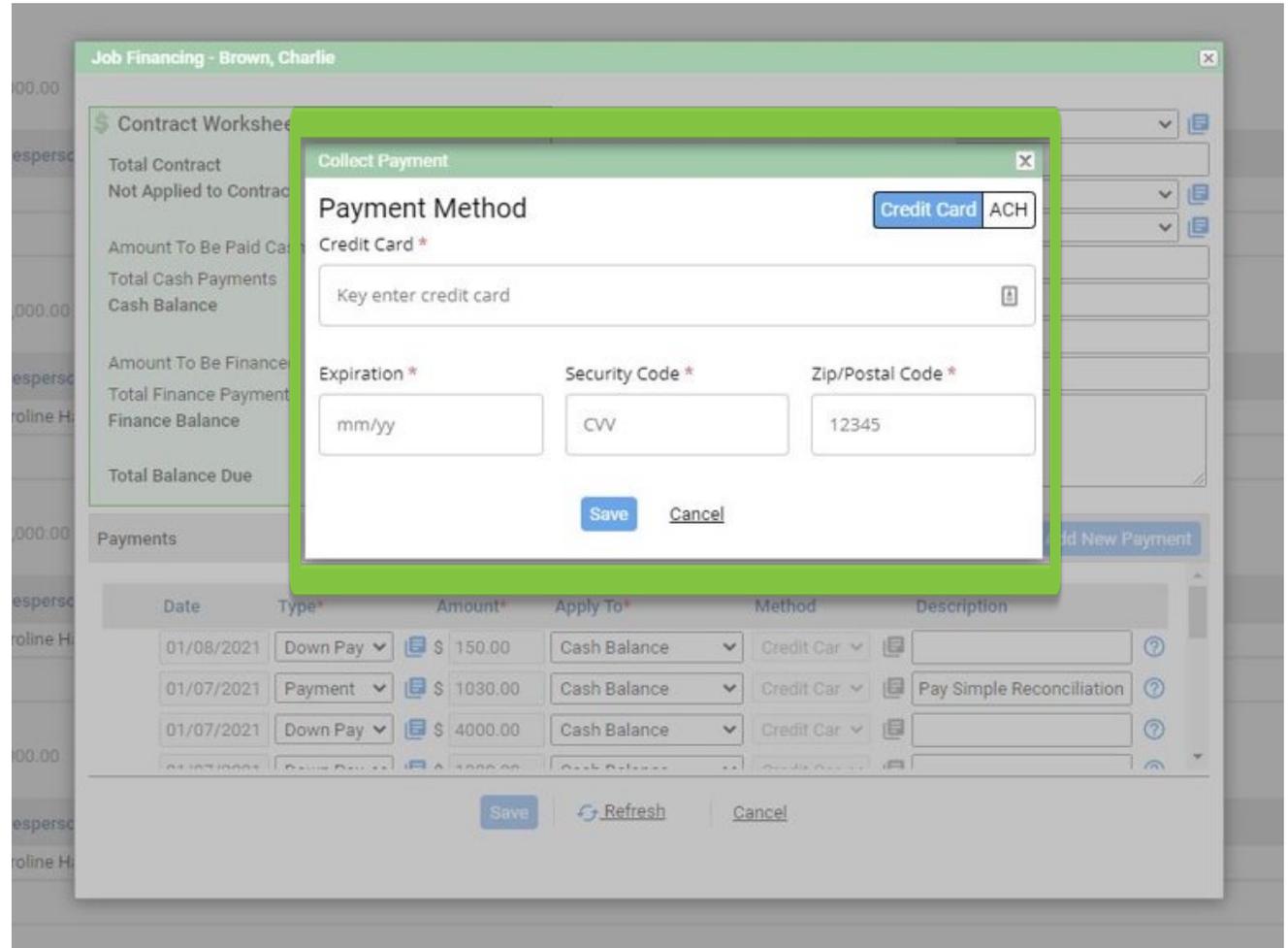
Buttons: **Collect Payment** (highlighted), Add New Payment, Save, Refresh, Cancel

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.



The screenshot shows a 'Job Financing - Brown, Charlie' window with a 'Collect Payment' dialog box open. The dialog box has a 'Payment Method' section with 'Credit Card' selected and 'ACH' as an alternative. Below this, there is a text input field for the card number with the placeholder 'Key enter credit card'. There are also three separate input fields for 'Expiration *' (with a 'mm/yy' placeholder), 'Security Code *' (with a 'CVV' placeholder), and 'Zip/Postal Code *' (with a '12345' placeholder). 'Save' and 'Cancel' buttons are at the bottom of the dialog. The background shows a 'Contract Worksheet' with various financial metrics and a 'Payments' table.

Date	Type	Amount	Apply To	Method	Description
01/08/2021	Down Pay	\$ 150.00	Cash Balance	Credit Car	
01/07/2021	Payment	\$ 1030.00	Cash Balance	Credit Car	Pay Simple Reconciliation
01/07/2021	Down Pay	\$ 4000.00	Cash Balance	Credit Car	

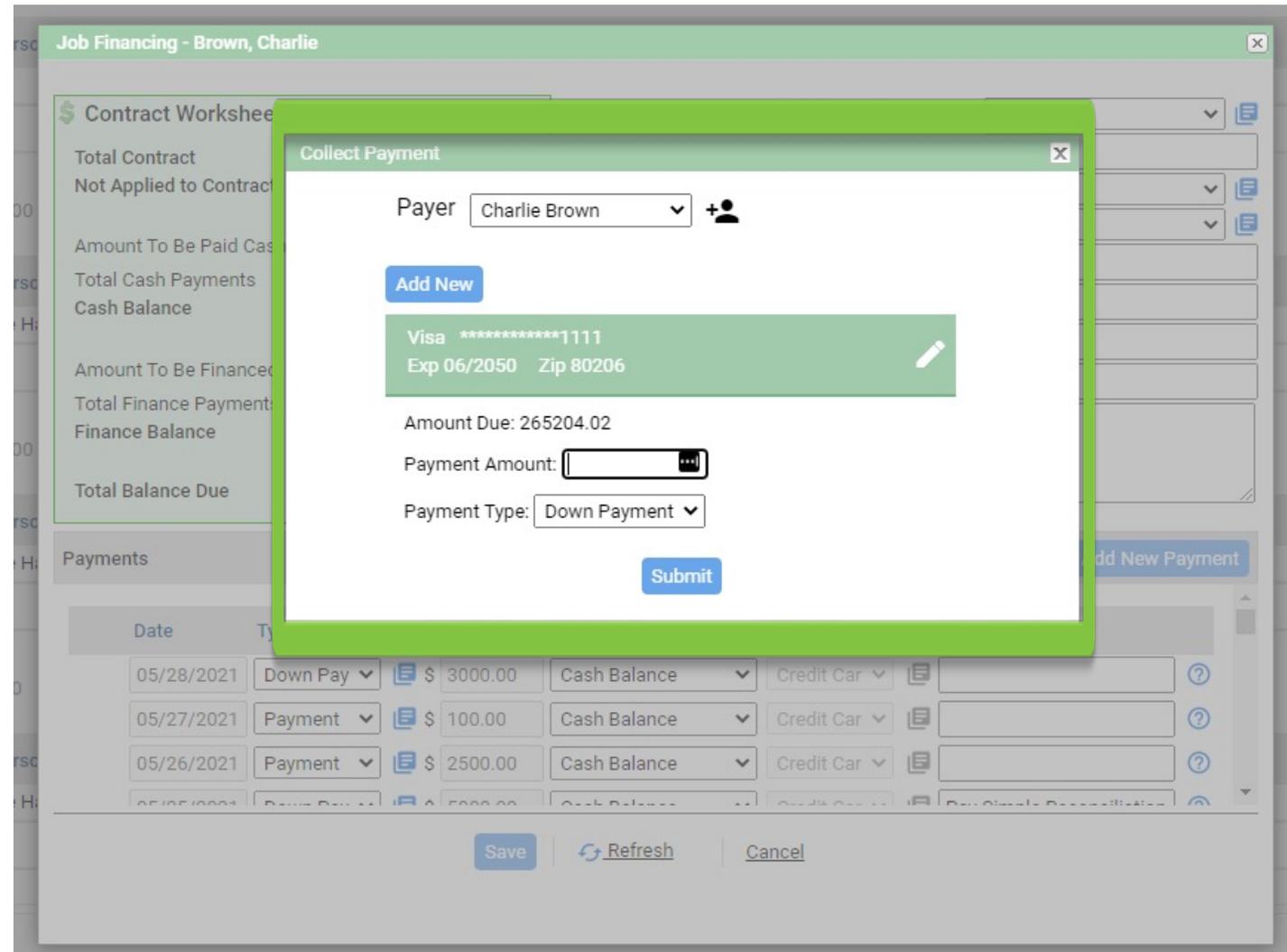
How to Process Payments in MarketSharp

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.



The screenshot shows a 'Collect Payment' dialog box overlaid on a 'Job Financing - Brown, Charlie' page. The dialog box contains the following fields and options:

- Payer:** Charlie Brown (with a dropdown arrow and a plus icon)
- Add New:** A blue button to add a new payment method.
- Payment Method:** A green box containing 'Visa *****1111', 'Exp 06/2050', and 'Zip 80206' with a pencil icon for editing.
- Amount Due:** 265204.02
- Payment Amount:** An input field with a currency symbol and a dropdown arrow.
- Payment Type:** Down Payment (with a dropdown arrow)
- Submit:** A blue button to process the payment.

The background page shows a 'Contract Worksheet' with the following summary:

Total Contract	Not Applied to Contract
Amount To Be Paid Cash	Total Cash Payments
Cash Balance	Amount To Be Financed
Total Finance Payment	Finance Balance
Total Balance Due	

Below the summary is a 'Payments' table:

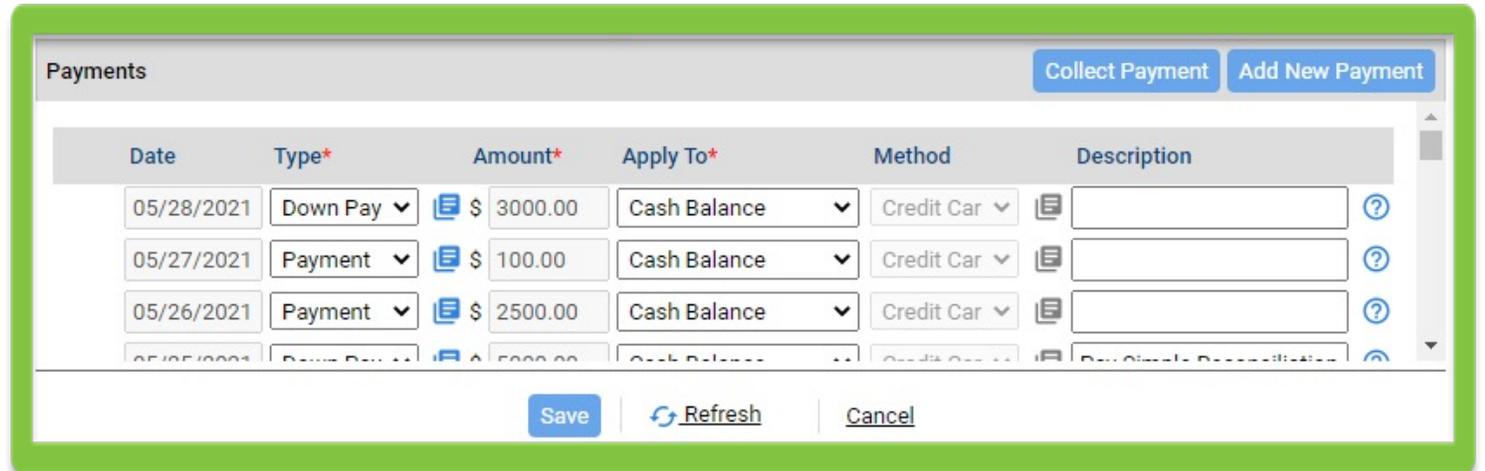
Date	Type	Amount	Balance	Method
05/28/2021	Down Pay	\$ 3000.00	Cash Balance	Credit Car
05/27/2021	Payment	\$ 100.00	Cash Balance	Credit Car
05/26/2021	Payment	\$ 2500.00	Cash Balance	Credit Car

At the bottom of the page are buttons for 'Save', 'Refresh', and 'Cancel'.

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.



The screenshot shows the 'Payments' section of the MarketSharp interface. At the top right, there are two buttons: 'Collect Payment' and 'Add New Payment'. Below these is a table with the following columns: Date, Type*, Amount*, Apply To*, Method, and Description. The table contains four rows of payment data. At the bottom of the interface, there are three buttons: 'Save', 'Refresh', and 'Cancel'.

Date	Type*	Amount*	Apply To*	Method	Description
05/28/2021	Down Pay	\$ 3000.00	Cash Balance	Credit Car	
05/27/2021	Payment	\$ 100.00	Cash Balance	Credit Car	
05/26/2021	Payment	\$ 2500.00	Cash Balance	Credit Car	
05/25/2021	Down Pay	\$ 5000.00	Cash Balance	Credit Car	Down Simple Description

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



800.466.0992



care@paysimple.com



support.paysimple.com