

# PaymentHQ Features

This book contains all Help Articles for Registration Partners (or, Dealers) specifically, and is linked to PaymentsHQ.

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# Rapid Onboarding

Rapid Onboarding is broken down into two subsections:

<b>PRICING MODELS</b>	This is where you will find a list of each of your pricing models as well as its permalink. You can use this link to embed a button within your platform to allow your users to initiate signing up themselves. Any time your user begins to fill out one of your merchant applications, you will be able to track it through the Rapid Onboarding tool.
<b>MERCHANT INVITATIONS</b>	This is where you are able to view the status of all of your applications - both those that you have sent as an invitation and those that have self-initiated signing up using one of your permalinks.

## Pricing Models

Each of your Pricing Models is listed under this section. To have a Pricing Model added or removed, [SportsPay Partner Support](#) can assist you.

Each row lists a Pricing Model and includes the following information:

Header	Description
Name	Descriptor of the specific pricing model. We suggest using a name that makes sense to you.
Billing Plan	The type of pricing structure used for the specific pricing model. This is displayed as an acronym.
Monthly fee	Monthly fee charged to the user
Base Txn \$	Per transaction fee in dollars
Base Txn %	Per transaction fee in basis points (bps)
Non-Profit	Refers to the business/operational model of the merchant for which the Pricing Model is intended. Values will be either Y for yes or N for no.
Action	<a href="#">Copy Link</a> <a href="#">Invite Merchant</a>

**Copy Link:** Each of your Pricing Models will have its own permalink accessible by clicking "Copy Link". Use this link to distribute to your users or embed on your platform so your users can self-initiate completing one of your Merchant Applications.

Select [Invite Merchant](#) next to the applicable Pricing Model to begin creating a new application.

## Merchant Invitations

Merchant Invitations is where you can track the merchant application invitations you have sent or merchant applications that have been self-initiated using one of your Pricing Model permalinks.

NAME	DESCRIPTION
Merchant	Name of the organization
Auth Signor's Email	Email address to which the merchant application was sent
Pricing Model	Pricing model that was sent with the application
Base Rate %	The transaction base rate % for the application (when you send a merchant application, you have the ability to change the base rate %)
Auth Signor	Name of the authorized signor
Status	There are 3 statuses: <ul style="list-style-type: none"><li>• Invitation sent on YYYYMMDD</li><li>• Link opened on YYYYMMDD</li><li>• Application submitted on YYYYMMDD</li></ul>
Action	<b>Delete:</b> Once a merchant invitation is sent, you are able to delete the application, which would cause the link sent to the merchant to be invalid (the page would reflect an error message stating so). If you need to change the base rate or the pricing model, you will need to delete the application and resend a new one. All other changes can be managed by the organization and do not require a new application.

Each of your applications will remain on this page until their application has been accepted by SportsPay in which it will be moved to your PaymentsHQ home page under "Application" status.

## Inviting a Merchant

For greater flexibility, you can mark up or down the base transaction rate. Any other pricing changes (such as the per-transaction rate, application fee, or monthly fee) require a new Pricing Model.

Fill in the Organization's Name, Authorized Signer's Name, and the Authorized Signer's E-mail to send the application to the Authorized Signer. You also have the option of prefilling the application with as much or as little information as you choose.

The organization can change any information you fill out (except the pricing and fees) and have the option to forward the application to another individual for signature.

Once you have completed filling in the fields, select Review for a brief summary of the application before you send.

A confirmation message will appear once the Merchant Application has been successfully sent. You will now be able to monitor its status under "Merchant Invitations," where you will see it listed.

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## Frequently Asked Questions

### How long is the application link valid for?

Once a merchant invitation is sent, it must be signed and submitted to SportsPay within 30 days or else it will become expired.

### What happens to unsigned applications if I remove a pricing model?

The merchant application will still be valid, but it is still subject to the 30-day validation period. This means that once the 30-day validation period has elapsed and the merchant has not submitted the application, they will no longer be able to open the application link, as the application is no longer valid, and that pricing model will no longer be active for you to reissue a merchant application.

### How do I change the Pricing Model or Pricing for an application already sent to the Merchant?

To make any changes to the pricing you will need to delete the existing application and send a new invitation with the corrected pricing.

Our merchant applications are very short and can be filled out by your user in minutes.

# Dealer Charges

Add a one-time charge to your merchant's monthly statement using this feature. Any added Charge will be its own line item on the merchant's monthly statement and is paid out to you in full with your monthly compensation.

## Adding a One-Time Charge

To add a single, one-time charge to a merchant, select [Add One-Time Charge](#)

If you need to add more than a few one-time charges, select [Upload File of Charges](#) to utilize our bulk upload option using CSV format.

CSV FORMAT	
Add one charge per line using the following format: MERCHID, AMOUNT, DESCRIPTION, DATE If you need to add more than one charge to a merchant, add each charge as its own line item.	
MERCHID	Merchant ID of the merchant to apply the charge to. You can find this information in PaymentsHQ
AMOUNT	Total amount to be charged to the merchant in dollars and cents (i.e. \$5.00 must be written as "5.00". If it is entered as "500" it will be interpreted as \$500.00)
DESCRIPTION	Description of the charge to be displayed on the merchant's monthly statement
DATE	Date to post the charge in YYYYMMDD format. It is defaulted to the current date.  Please note that this is the post date, not the billing date. Merchants are billed at the beginning of the month for the previous month's activity. That means that if you put the date as 20230701, the merchant will be billed your charge on their July statement, which is billed August 1st. If you put the date as 20230828, the merchant will be billed on their August statement, which is billed September 1st.

If you need to add a recurring charge that will be the same fee each month, use the "Recurring Dealer Charges" feature instead. This has the advantage of not needing to input it each month.

## Viewing & Editing One-Time Charges

After posting your charges, you will see each charge listed on the page. You also have the option to view or delete a charge up until the applicable billing date for that charge.

The Type column indicates the type of charge that was applied:

- **Batch** refers to a charge that was uploaded as part of a batch file and is a one-time charge
- **All Monthly** refers to a recurring charge that was added using a recurring charge applied to all of your merchants
- **One-Time** refers to a one-time charge that was added for that specific merchant

# Recurring Dealer Charges

Add a recurring charge to your merchant's monthly statement using this feature.

Any added Charge will be its own line item on the merchant's monthly statement and is paid out to you in full with your monthly compensation.

## Add a Recurring Charge

Select **All Merchants** to apply the recurring charge to all of your merchants, including merchants that are added after you've created the recurring charge. This means that when you board a new merchant, this recurring charge will automatically be added to their monthly statement, with the exception of their very first statement<sup>1</sup>.

<sup>1</sup> An existing recurring charge will automatically be added to new merchants starting with their second monthly statement. To add the recurring charge to their very first statement, use **Add One-Time Charge** with the current date. On their second statement and all statements thereafter, the recurring charge will automatically be applied.

To apply a recurring charge to a specific merchant, choose the applicable merchant from the drop-down.

## Viewing your Recurring Charges

Each of your recurring charges will be listed with the option to delete it.

When applying a recurring charge to all merchants, you can get a more granular view by selecting "Dealer Charges" on your PaymentsHQ home page. Each specific merchant charge will be listed as its own line item with the option to edit or delete the charge at the merchant level rather than applying the change to the group level.

## Deleting a Recurring Charge

Deleting a recurring charge has the effect of deleting all **future** postings of the recurring charge. Each recurring charge is posted on the first of the month, which means that deleting a recurring charge won't take effect until the next month's bill.

For example, on July 1st, your recurring charge is automatically posted. If you delete the recurring charge on July 10th, it will prevent the recurring charge from being posted on August 1st, but it won't affect the July 1st post.

You could apply a credit using **Add One-Time Charge** to offset any automatic recurring charge

# Rapid Onboarding v2

Easily track applications you have sent or applications that have been self-initiated using one of your Permalinks. Your applications are organized into three categories:

TAB	DESCRIPTION
<b>Outstanding</b>	<ul style="list-style-type: none"><li>• Applications with one of the following statuses: <a href="#">Created</a>, <a href="#">Opened</a>, <a href="#">Submitted</a>, or <a href="#">Expired</a>.</li><li>• Once the application is submitted and the merchant is issued a merchant account, it will move over to the Completed tab.</li><li>• Any expired applications will stay in Outstanding until you either <a href="#">Edit &amp; Resend</a> or <a href="#">Cancel</a> the application.</li></ul>
<b>Completed</b>	Merchants who have been successfully onboarded and issued a merchant account. (This does not include merchant applications that were completed using Rapid Onboarding V1).
<b>Cancelled</b>	Applications that you have cancelled. Simply select <a href="#">Edit &amp; Resend</a> to return the application to Outstanding.

Each application listed includes the following information:

HEADER	DESCRIPTION
<b>Merchant</b>	Name of the organization followed by a unique AppID
<b>Auth Signor's Email</b>	Email address to which the application was sent
<b>Offer</b>	What the Offer was for the application, and once the application has been completed, it will list the Pricing Model that was chosen (if applicable).
<b>Auth Signor</b>	Name of the authorized signor and their email address



<b>Status</b>	<p>One of the below statuses will be given and date-stamped. The expiry date is also appended to the end of each status for your reference.</p> <ul style="list-style-type: none"> <li>• <b>Created:</b> Application has been sent to the merchant.</li> <li>• <b>Opened:</b> Application has been previewed by the merchant. This will be the first status given to merchant applications that are started using one of your Permalinks.</li> <li>• <b>Submitted:</b> Application has been submitted to SportsPay and is currently being reviewed and onboarded.</li> <li>• <b>Completed:</b> Merchant has been issued a merchant account; You will see their unique SportsPay Merchant ID following this status, and it is listed as a hyperlink. Simply click on it to be brought to their specific reporting page.</li> <li>• <b>Cancelled:</b> Application that you have cancelled.</li> <li>• <b>Expired:</b> Application has expired. To resolve this status, you must either Cancel the application or Edit &amp; Resend.</li> </ul>
<b>Action</b>	<ul style="list-style-type: none"> <li>• <b>Copy Link:</b> Copy the permalink for that application</li> <li>• <b>Edit &amp; Resend:</b> Modify the application and resend it to the authorized signer. This includes changing the Base Txn %. If you need to change the Offer, you would need to cancel the application and send a brand new one.</li> <li>• <b>Cancel:</b> Cancel the application, which would cause the application link to be invalid (the page would reflect an error message stating so). If you need to change the Base Txn Rate %, you can simply select Edit &amp; Resend. If you want to send the merchant a different Offer, you would need to cancel the application and send them a brand new one.</li> <li>• <b>View Application:</b> Once the application has been signed, you will be able to view the application that was submitted, including which pricing model the merchant chose (in the case where there was an Offer with multiple Pricing Models).</li> </ul>

## Offers

Select the Offers button to view your Pricing Models and Offers.

*(Refer to the Help icon on the Offers page for more information on your Pricing Models and Offers.)*

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## Frequently Asked Questions

### How long is the application link valid for?

Once an application is sent, it must be signed and submitted to SportsPay within 30 days or else it will become expired.

### How do I change the Offer or Pricing for an application already sent to the Merchant?

To make any changes to the Base Txn Rate %, simply select Edit & Resend for that application, and you will be able to modify the Base Txn Rate %.

If you would like to present the Merchant with a different Offer, you will need to delete the existing application and send them a new one with the correct Offer.

# Offers

This page is where you can review your different Offers as well as send out a merchant application using one of your Offers.

## MULTI-MODEL OFFERS

Offers which include more than one Pricing Model for the customer to choose from

## SINGLE-MODEL OFFERS

Offers with one Pricing Model

To have a Pricing Model added or removed, [SportsPay Partner Support](#) can assist you.

Under each section, you will find a list of your Offers:

Header	Description
Offer Name	A unique name assigned to the Offer. The Offer Name is only seen by you and not seen by the merchant at any time. Example: Embedded on Website Offer, Preferred Club Pricing, etc. (Ask SportsPay Partner Support to customize your Offer Name)
Pricing Models	Lists each Pricing Model included in the Offer. Next to the Pricing Model's name includes the following details in this order: <ul style="list-style-type: none"><li>• Base Txn %</li><li>• Base Txn c</li><li>• Monthly fee</li></ul>
Action	<a href="#">Share Link</a> : Copy the Permalink for the Offer. Use this link to distribute to your users or embed on your platform so your users can self-initiate completing one of your Merchant Applications. <a href="#">Send New Application</a> : Send a new application using that Offer

## Send New Application

This is where you are able to send an application directly to a merchant.

Each Pricing Model that is included in the Offer will be listed and will display the following information:

<b>Pricing Model Name</b>	The name of the Pricing Model that is only seen by you.
<b>Display Title</b>	The name of the Pricing Model that is displayed to the merchant as they are completing the application. It is a descriptive title that assists in helping the merchant choose the best pricing model for them.
<b>Description</b>	A description explaining the Pricing Model that is displayed to the merchant as they are completing the application.

For greater flexibility, you are able to mark up or down the Base Transaction Rate %. Any other pricing changes (such as the per-transaction rate or monthly fee) require a new Pricing Model.

Fill in the Organization's Name, Authorized Signer's Name, and the Authorized Signer's E-mail to send the application to the Authorized Signer. You also have the option of prefilling the application with as much or as little information as you choose.

The organization can change any information you fill out (except the pricing and fees) and have the option to forward the application to another individual for signature.

You may also include any "Onboarding Comments" that will only be viewed by the SportsPay Team. For example, if you require urgent processing, please request so in the comments.

Once you have completed filling in the fields, select Send Application. You will now be able to monitor its status on Rapid Boarding's main page under "Outstanding".

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## Frequently Asked Questions

### How long is the application link valid for?

Once a merchant invitation is sent, it must be signed and submitted to SportsPay within 30 days or else it will become expired.

### What happens to outstanding applications if I modify the Offer?

Until the merchant application has been submitted to SportsPay, any updates you make to the Offer (including adding or removing a Pricing Model, changing the fees of a Pricing Model) will affect all outstanding applications.