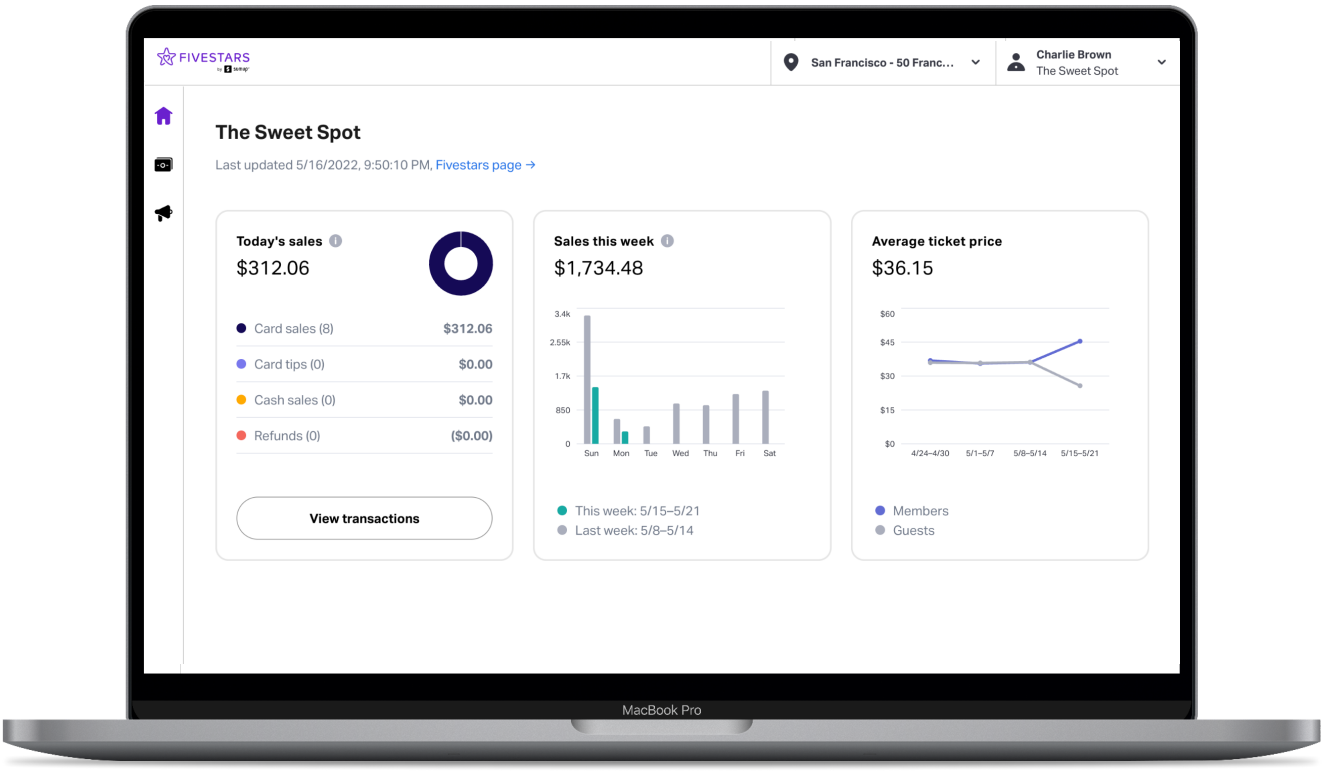
Payments Dashboard

User Guide



Updated May'22

What is the Payments Dashboard?

How do I access my payments dashboard?
- First-time login with email
- How do I reset or change my password?

How do I view my account information?
- Verify your banking information
- Verify your processing rates
- View your batch time and transfer schedule
- View other locations (if applicable)

How do I view my transactions?
- Finding transactions using filters
- Exporting a list of transactions

Where can I see a list of deposits?
- What do the different funding statuses mean?
- How do I view transactions associated with a deposit?

What do I do if I have a chargeback?

Who can I call for support?

What is the Payments Dashboard?

The Payments Dashboard is an online source of information for transactions processed with Fivestars.

When you accept card or cash payments with your Fivestars Pay device, the sales information will appear on your Payments Dashboard. This becomes useful when you're reconciling your transactions and deposits.

In addition to providing sales information, the Payments Dashboard will show details for the following: credit card tips, credit card refunds, credit card processing fees, daily and monthly sales reports, and deposits to your bank account.

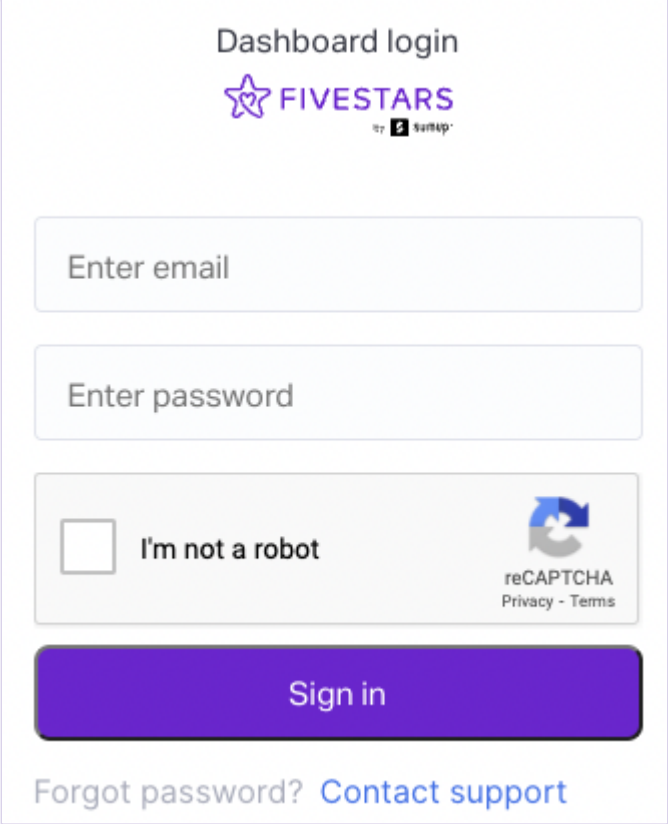
How do I access my payments dashboard?

First-time login with email

When you first log in to your Payments Dashboard, you will enter the email address and password that our Support team shared with you during your dashboard training.

To access your Payments Dashboard, go to https://pay-dashboard.fivestars.com.

Next, at the login screen, enter your email address and password. Click the "I'm not a robot" box and then click "Sign In".

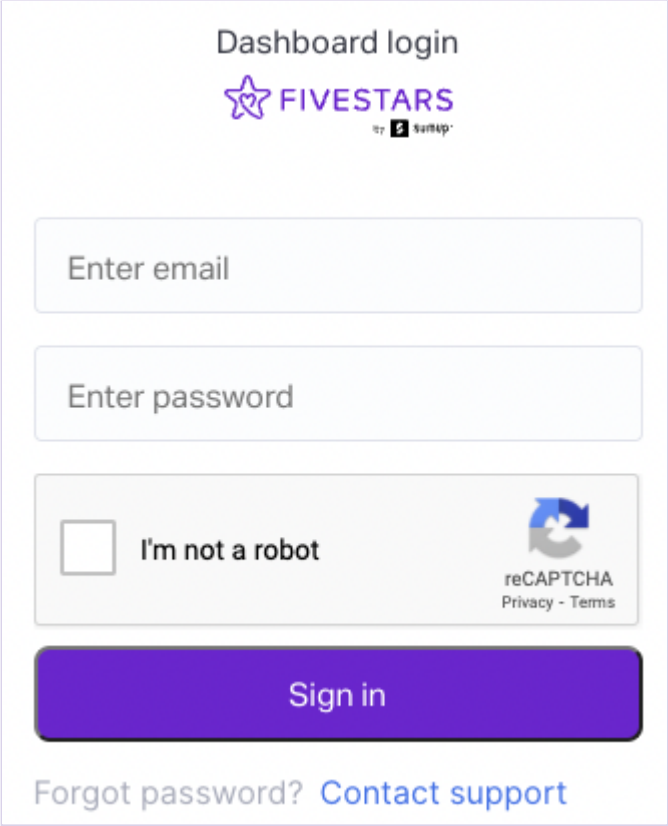


How do I reset or change my password?

To reset or change your password, go to https://pay-dashboard.fivestars.com.

Click the “Contact support” link at the bottom of the login screen. This will allow you to let our Support team know what’s going on so they can resolve the issue.

If you have any questions, feel free to reach out to our Support team at (860) 578-2770.



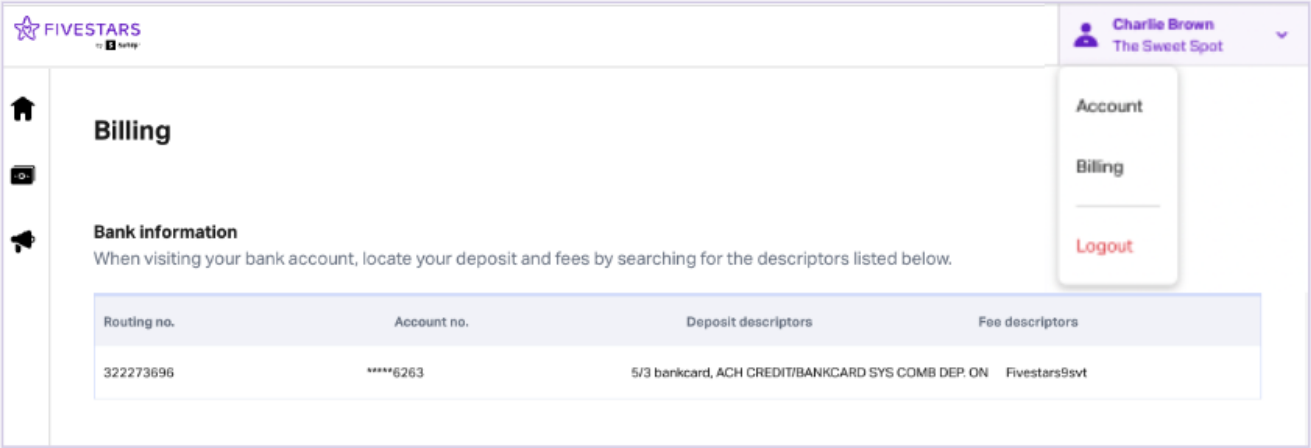
How do I view my account information?

The Payments Dashboard contains important account details, including banking information, deposit and fee schedule, and your processing rate.

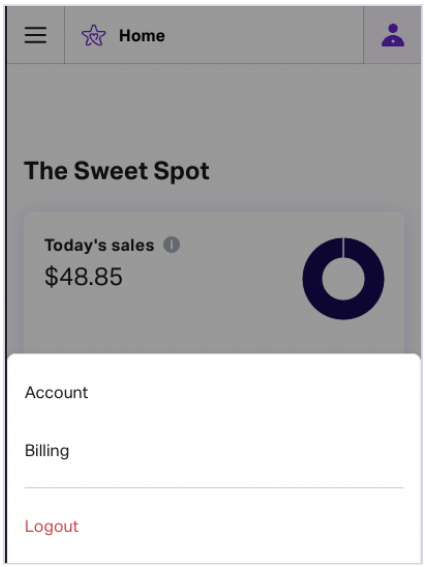
Verify your banking information

It's important to verify that your banking information is correct in your Payments Dashboard. You can do this by navigating to Billing where you can view your routing number and bank account number.

To navigate to Billing, click on the person icon in the upper right hand corner of the Payments Dashboard, then select "Billing".



(Desktop view)



(Mobile view)

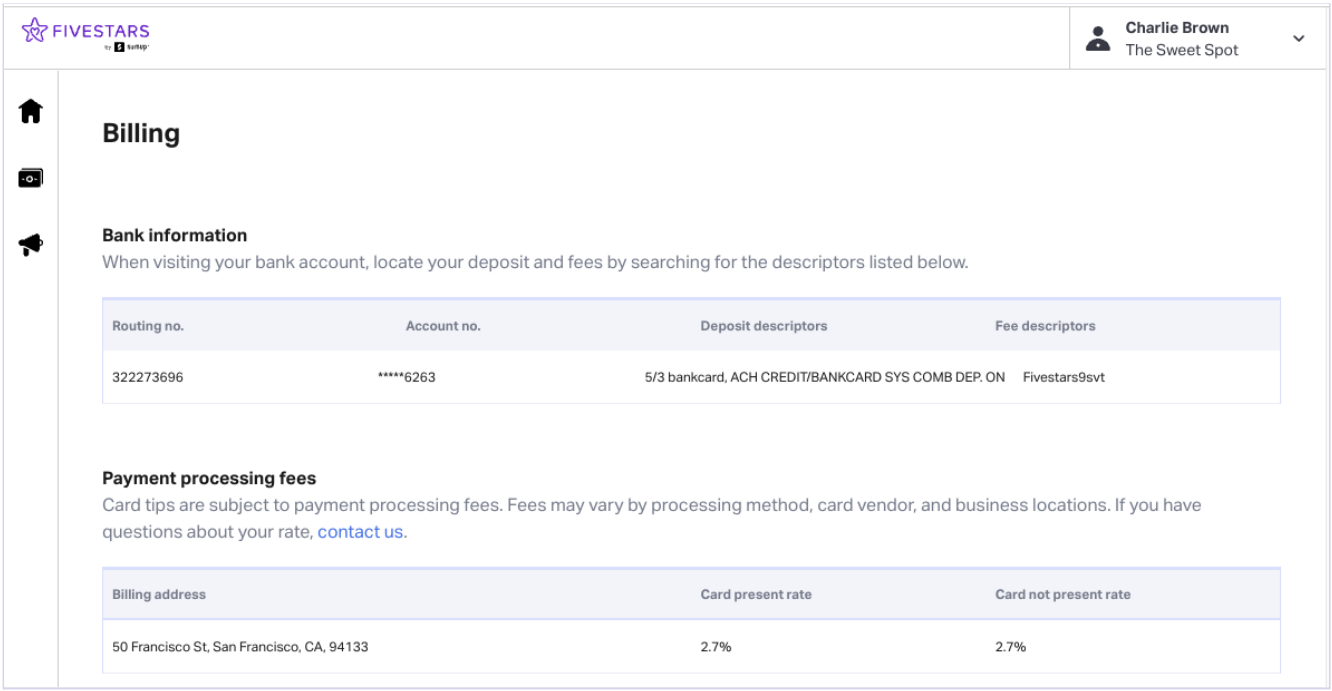
NOTE: If this information is incorrect, you may not receive your deposit on time. Please contact our Support team right away to correct this at (860) 578-2770. Be prepared to supply a voided check with the correct routing and account information.

Verify your processing rates

At Fivestars, we offer simple and transparent pricing. To view your processing rate(s), navigate to Billing.

Under “Payment processing fees” you will be able to view the payment processing rate(s) associated with your account, including your Card present and Card not present rates.

NOTE: Card not present transactions may be higher than the rate for swipe, dip and NFC transactions. This is due to the higher level of risk associated with these types of transactions. For increased protection from fraudulent transactions, we recommend that you always ask customers to dip their chip cards when possible.



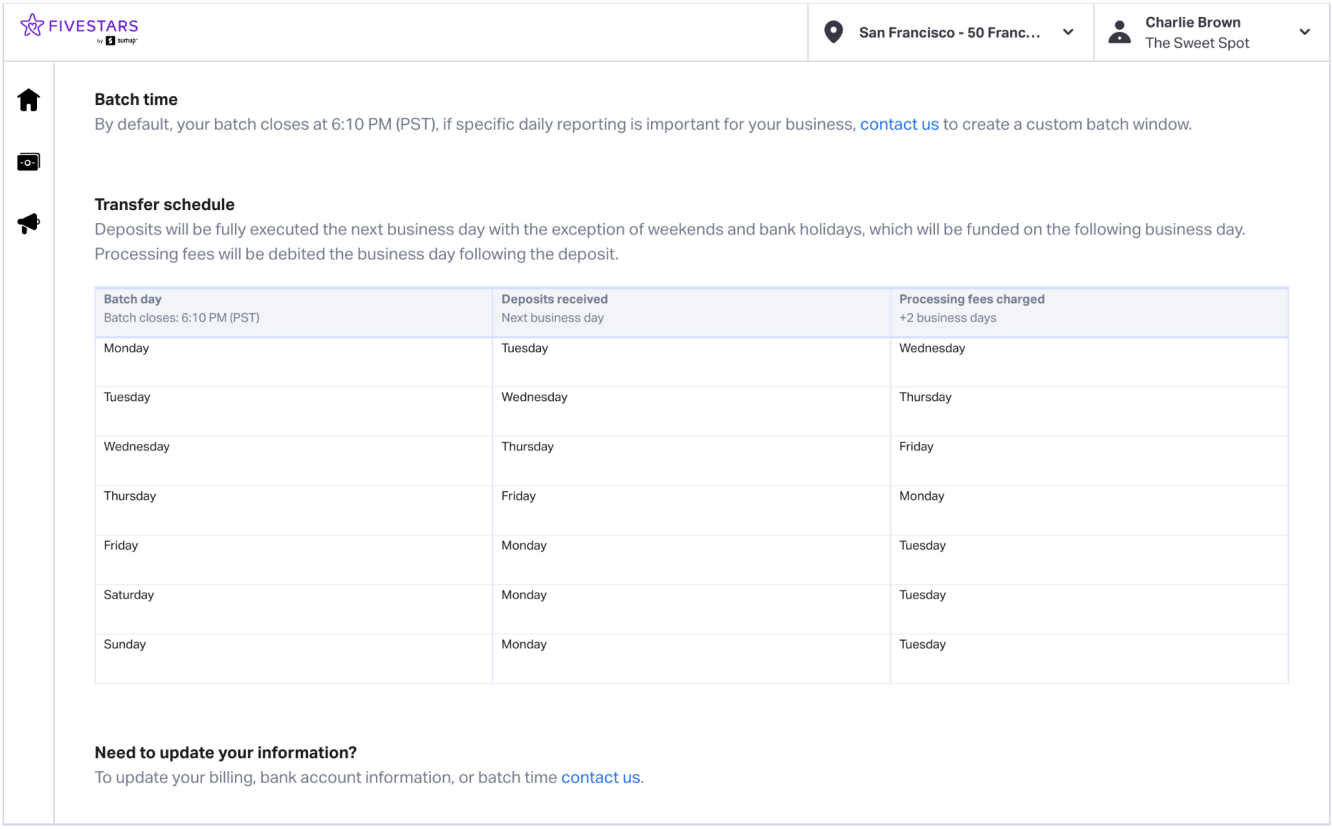
If you believe your credit card processing rate is incorrect, please contact our Support team at (860) 578-2770.

View your batch time and transfer schedule

To view your batch time and transfer schedule, navigate to “Billing” and scroll down.

The batch time is the cutoff time at which transactions are processed for the day.

The transfer schedule displays the dates when deposits are to be expected to appear in your bank account, and when processing fees are scheduled to be withdrawn.



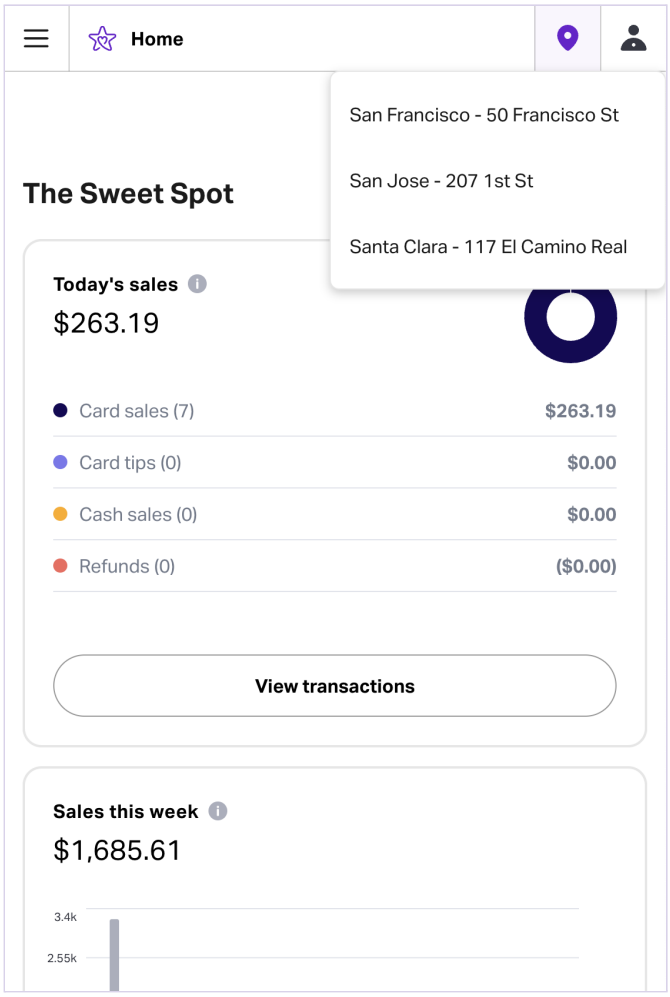
Batch day Batch closes: 6:10 PM (PST)	Deposits received Next business day	Processing fees charged +2 business days
Monday	Tuesday	Wednesday
Tuesday	Wednesday	Thursday
Wednesday	Thursday	Friday
Thursday	Friday	Monday
Friday	Monday	Tuesday
Saturday	Monday	Tuesday
Sunday	Monday	Tuesday

NOTE: Your batch time and transfer schedule may differ from the image above.

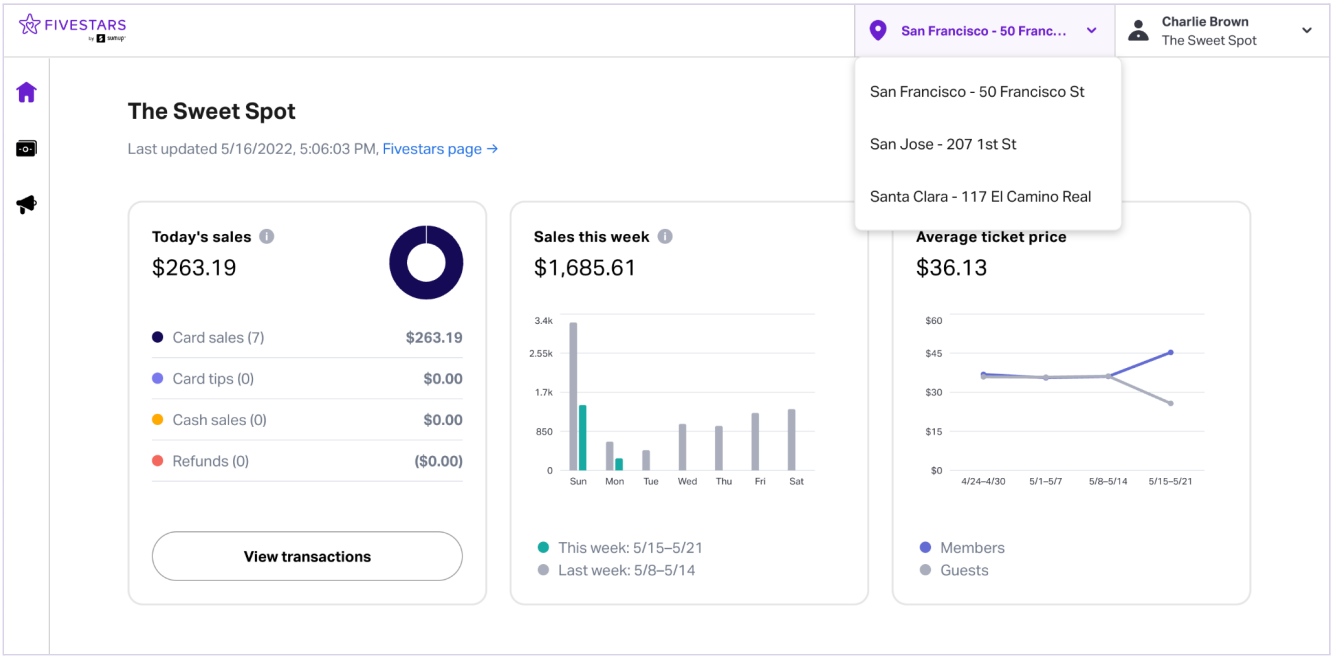
View other locations (if applicable)

If you have multiple business locations associated with your account, you can easily view the other locations by clicking on the location name in the header. All the locations associated with your account will show in a dropdown menu. Click on the location you wish to view.

Please note that the Payments Dashboard data is only shown for individual locations and is not aggregated across multiple locations. In other words, you won't be able to see the information for all of your business' locations at once, only each location individually.



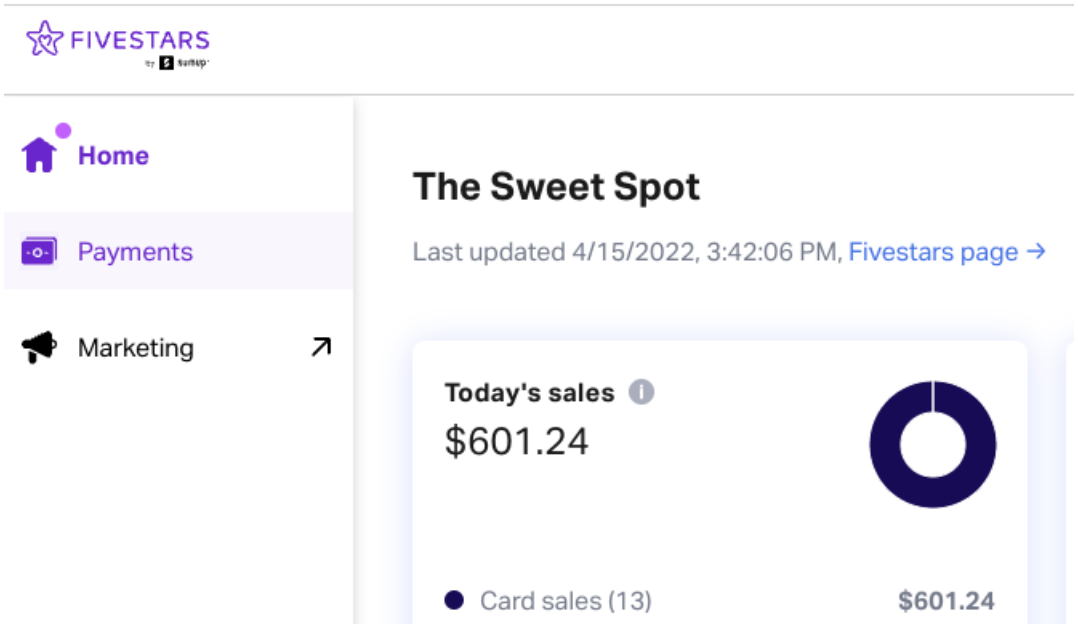
(Mobile view)



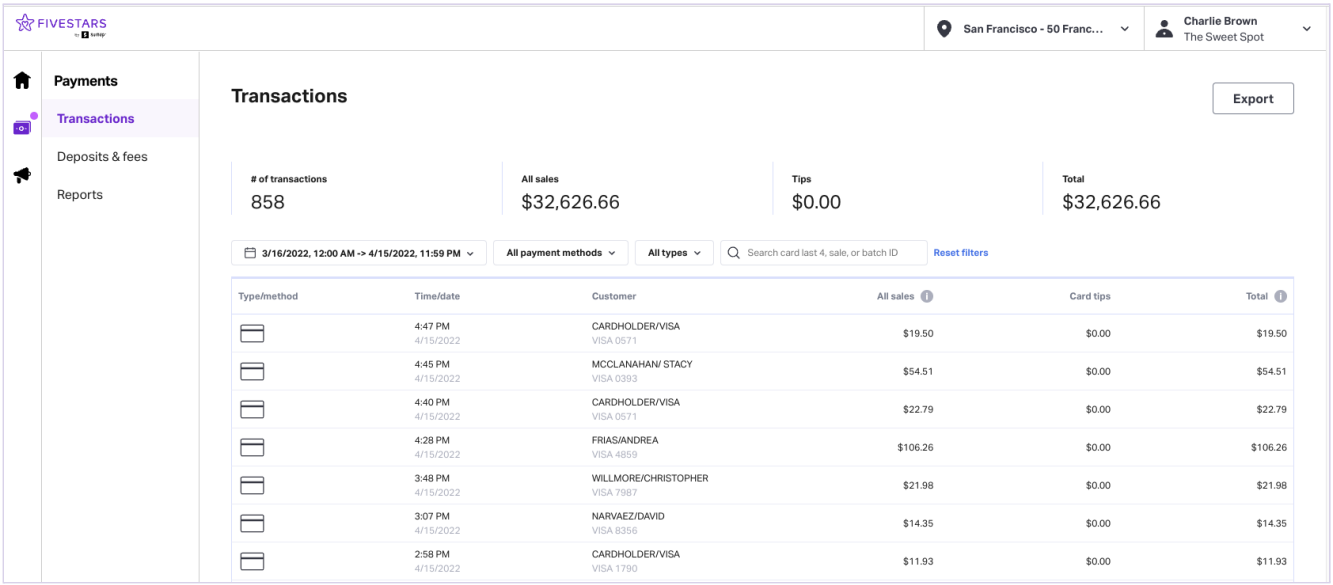
(Desktop view)

How do I view my transactions?

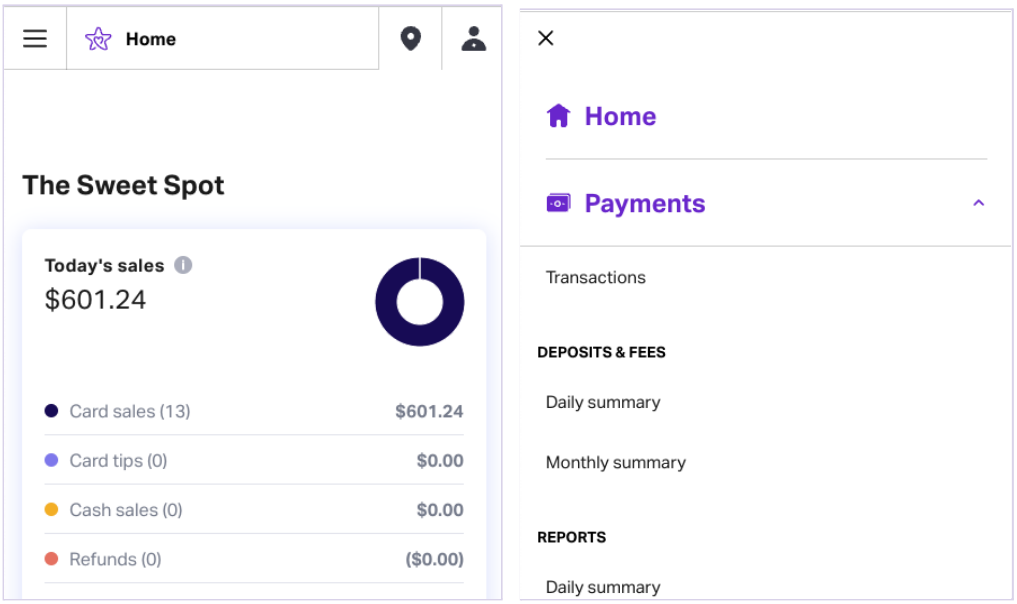
To view transaction details, navigate to the Transactions page by hovering over the main navigation menu on the left and click on “Payments”.



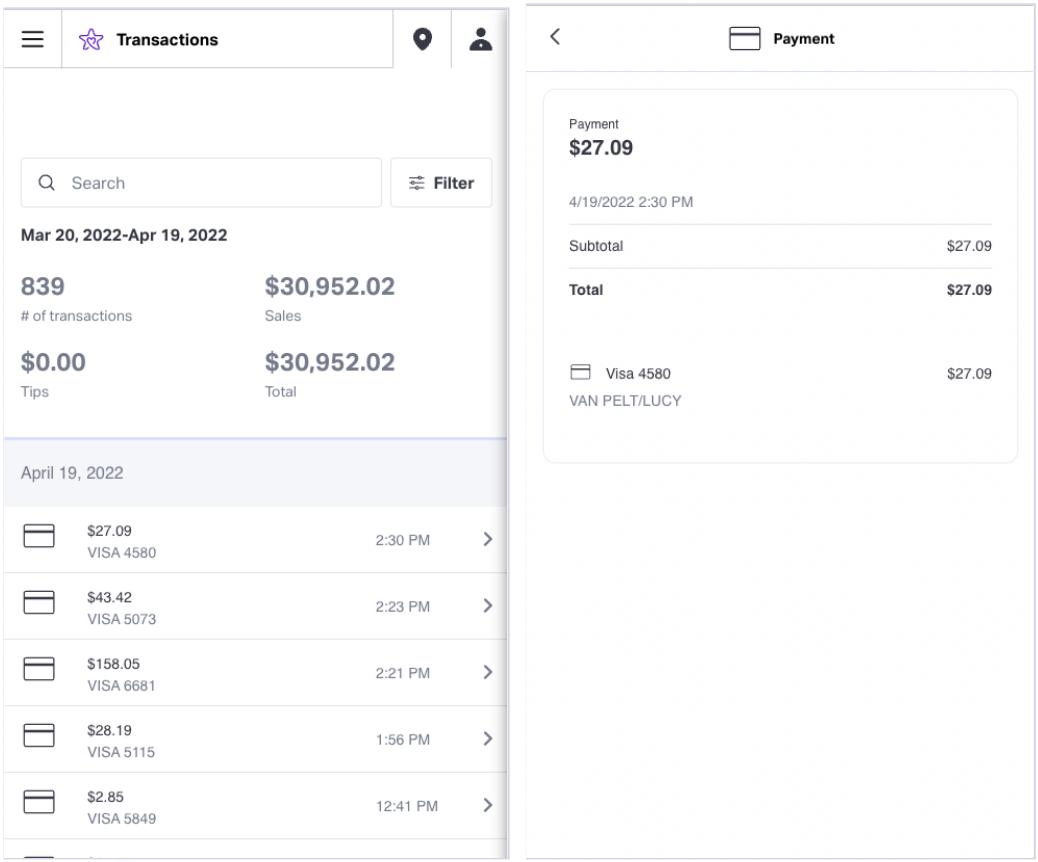
On the Transactions page, you’ll be able to view detailed information on each transaction, including the date and time of the transaction, tip amount, customer info, payment type, method of payment and last 4 digits of the card that was used for payment.



In the mobile view, click the menu icon on the top left, expand the “Payments” section and click on “Transactions”.



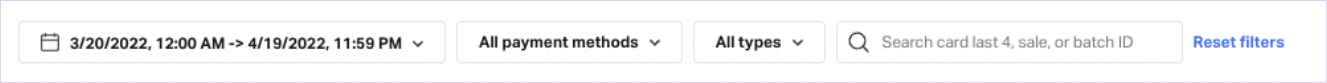
Click on the arrow at the end of the row to view detailed information on each transaction.



NOTE: The timestamp shown in this section is displayed according to the timezone that’s set on your device.

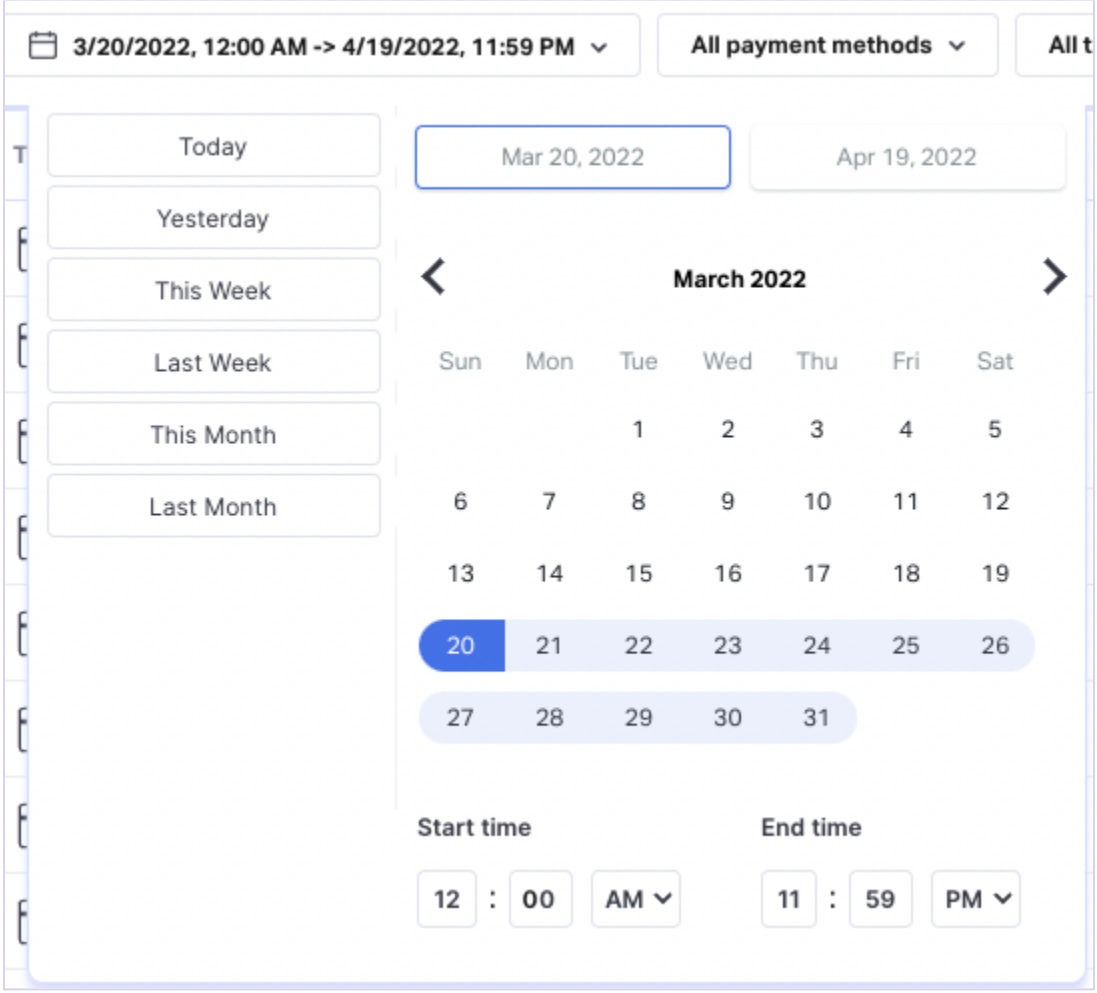
Finding transactions using filters

Using filters to sift through the transaction list makes reconciliation easier and searching for specific transactions faster. You can filter by date range, payment method, and payment type (Sales or Refunds). You can also search by the last 4 digits of a Card Number, the Sale amount, Total amount and Batch ID.



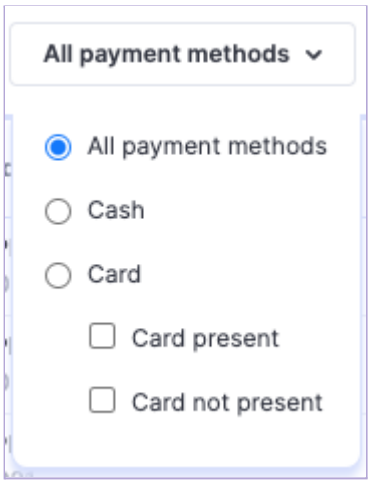
Filtering by Date

To filter by date, click on the date range field and select your start and end date. Transactions will then be filtered by the date and time range you enter. You can also select a date range shortcut (ex. Today, This Week, Last Month).



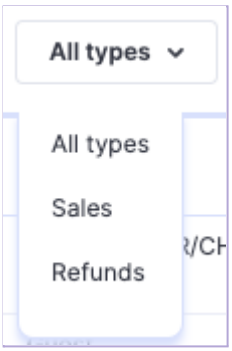
Filtering by Payment method

You can also filter by payment method to view only cash or card payments. Click on the Payments Method dropdown. In the dropdown, you can select Cash, Card, or even Card present and/or Card not present filter criteria.



Filtering by Payment type

To view a specific payment type, click on the Payment Type dropdown and select either Sales or Refunds.

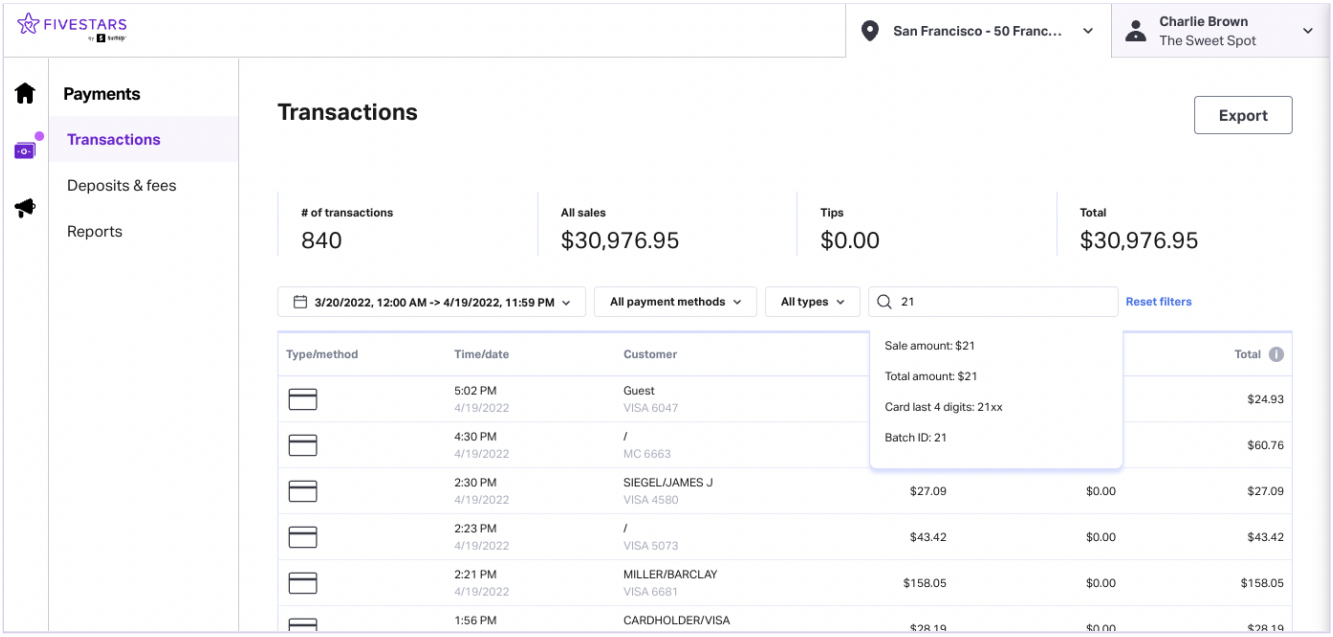


Searching by last four digits of a card, sale amount, transaction amount or batch ID

To filter by the last four digits of a credit card, type in the last four digits of the card into the search field, and then click on the “Card last 4 digits” option in the drop down. This will bring up all transactions associated with that card.

To filter by sale amount or total amount, type the relevant amount into the search field and then click the “Sale amount” or “Total amount” option in the dropdown menu. Remember that Sale amount is the amount *before* the tip and Total amount includes the tip.

If you would like to search by Batch ID to better understand what’s in your deposit (based on info on the Deposits and Fees page), type in the Batch ID number into the search field and then select the “Batch ID” option in the dropdown. This will show all the transactions for that specific batch.



Exporting a list of transactions (Desktop only)

You also have the option to export the information in your Payments Dashboard to a .csv file. To do this, click the “Export” button in the top-right corner of the Transactions page on your dashboard. This will initiate the file download.

	A	B	C	D	E	F	G	H
1	Date	Split payment	Payment status	Customer name	Card Info	Sales	Tip	Total
2	2022-04-19 21:30:15	FALSE	Payment	SIEGEL/JAMES J	VISA 4580	$27.09	$0.00	$27.09
3	2022-04-19 21:21:17	FALSE	Payment	MILLER/BARCLAY	VISA 6681	$158.05	$0.00	$158.05
4	2022-04-19 20:56:25	FALSE	Payment	AMALA/PAUL A.K.	VISA 5115	$28.19	$0.00	$28.19
5	2022-04-19 19:41:06	FALSE	Payment	TOMSOVIC/ALLEN	VISA 5849	$2.85	$0.00	$2.85
6	2022-04-19 19:32:33	FALSE	Payment	CARDHOLDER/VISA	VISA 7346	$31.72	$0.00	$31.72
7	2022-04-18 23:58:01	FALSE	Payment	Guest	Cash	$5.42	$0.00	$5.42
8	2022-04-18 22:44:05	FALSE	Payment	CARDHOLDER/VISA	VISA 4963	$10.85	$0.00	$10.85
9	2022-04-18 22:34:19	FALSE	Payment	CLEMENS/ SHANE	VISA 7756	$32.57	$0.00	$32.57
10	2022-04-18 22:23:49	FALSE	Payment	CARDHOLDER/VISA	VISA 3178	$19.54	$0.00	$19.54

Note the transaction times are set to UTC (Coordinated Universal Time), and not to the timezone of the user who exported the transactions.

Note for Cash Discounting merchants: When you export your .csv you will notice that there is a Service Fee column and a Cash Discounts column. The Service Fee column shows you how much each customer was charged in service fees. The Cash Discounts column tells you how much was discounted for customers who paid with cash.

If you accept tips, please note that these are also subject to processing fees. You can also see a list of your processing fees if you download a .csv file from the Reports section of your

Payments Dashboard. The Processing Fees column is the service fees collected from your customers plus the processing fees applied to tips.

The colored text in the image below highlights the different parts of the transaction associated with VISA 2955.

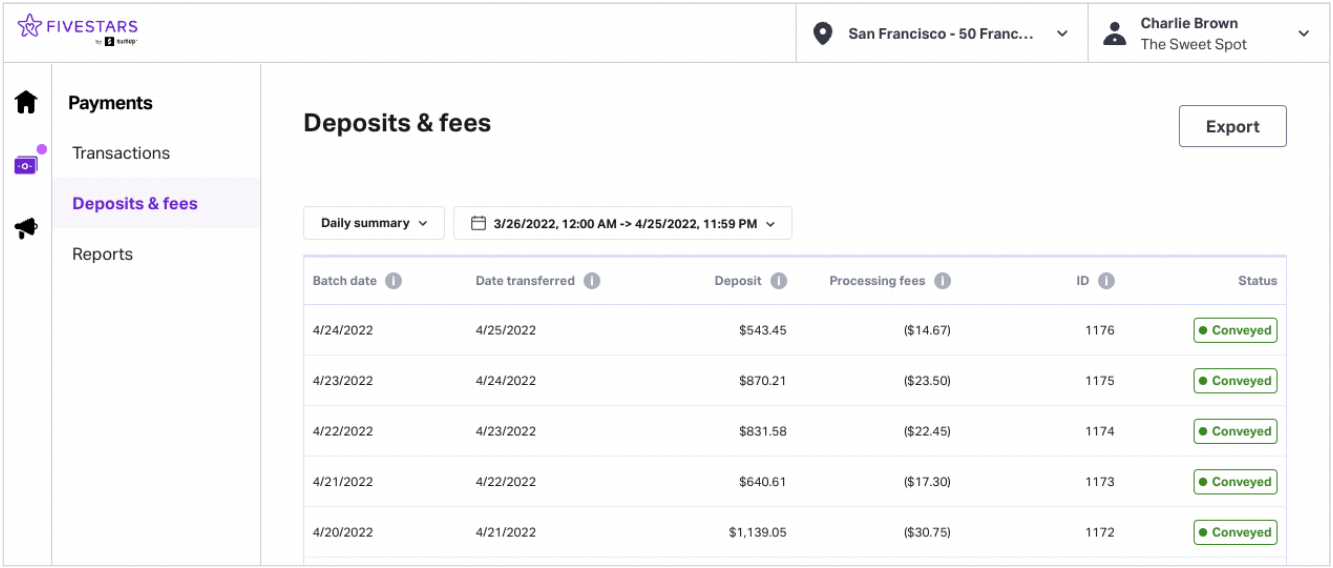
transactions

Date	Split payment	Payment status	Customer name	Card Info	Sales	Service Fees	Cash Discounts	Tip	Total
2020-10-20 11:30:35	FALSE	Payment	Guest	VISA 2955	$10.00	$0.40	$0.00	$2.08	$12.48
2021-10-20 11:25:42	FALSE	Payment	Chioke Okonkwo	Cash	$5.00	$0.20	($0.20)	$0.00	$5.00

Sale ($10.00) 4% Service fee ($0.40) Cash Disc. ($0.00) Tip ($2.08) Trx amount ($12.48)

Where can I see a list of deposits?

For information on your deposits, navigate to the Deposits & fees page. You can do this by hovering over the Payments tab and clicking on “Deposits & fees”.



You can find the following information on the Deposit & fees page:

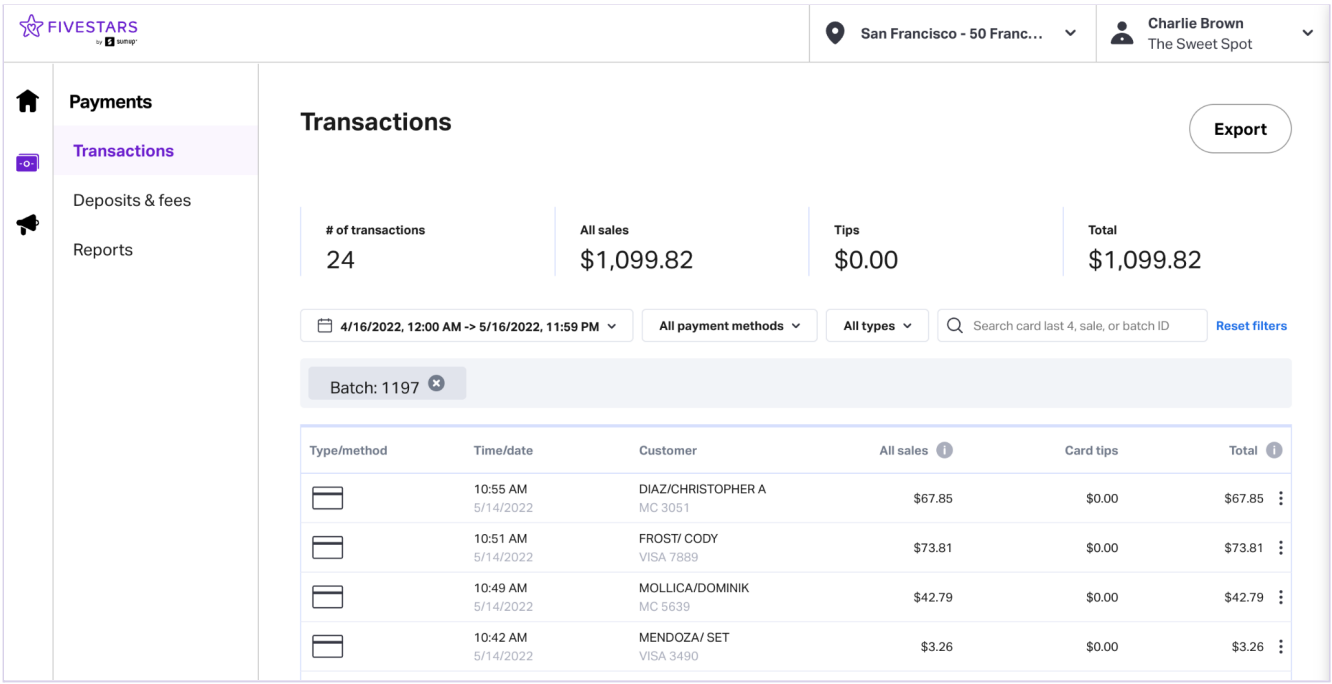
- Batch date
- Transfer date
- Deposit amount
- Processing fees amount
- Batch ID
- Funding status

What do the different funding statuses mean?

- When the batch is **Conveyed** or **Funded**, it means that funds have been sent to your bank account. Note that the actual time of deposit into your bank account is determined by your bank.
- When the batch is **Rejected**, it means that funds have not been sent to your bank account.

How do I view transactions associated with a deposit?

To view all transactions associated with a given deposit, copy the Batch ID for a deposit and search for it on the Transactions page. This will bring up transactions that were processed in that particular batch.



From this screen, you can also download a .csv file containing all the transaction details. Just click “Export” in the top-right (only available on desktop).

What do I do if I have a chargeback?

Fivestars does not currently charge a fee in the event of a chargeback. You will ultimately be responsible for disputing the chargeback.

If your business incurs a chargeback, we will call you. We will also send an email detailing the chargeback, and we'll help you dispute it.

If you are found liable, you will need to pay the chargeback amount.

You can view our current payment processing fees here:
https://hi.fivestars.com/payment-fees.html

You can view our current payment processing terms here:
https://hi.fivestars.com/payment_processing_terms.

Who can I call for support?

Our Support team is ready to assist you at (860) 578-2770.

Monday-Friday: 4 AM - 11 PM PT
Saturday-Sunday: 6 AM - 11 PM PT

Or, email us at pay-support@fivestars.com