Welcome to Hyfin! Please use the Onboarding Process Guide to help navigate the onboarding experience as well as learn some useful tips in getting started and where to go for support.

Contents

Merchant Steps for Onboarding

1 The merchant Hyfin account will be created by Clearent's Onboarding Team and a user invite email is sent. Please follow the link and complete your setup.
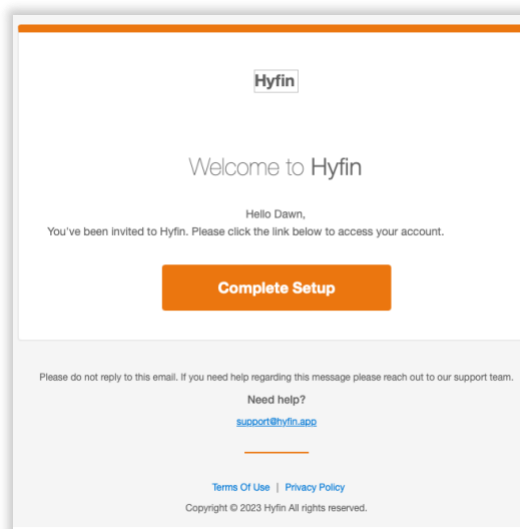
Upon logging in, you may be prompted to set up your QuickBooks Online integration (if applicable). Note, you may skip this step and await further instruction via your Hyfin Training.

2 Once you receive the Hyfin Welcome Email, informing that the account is live and ready to accept payments, you'll have to ability to schedule training if you're integrating QuickBooks Online.

Not Utilizing QuickBooks Online Email:

Hi ____,

Your **Hyfin** service is live and ready for you to start accepting payments. An email has been sent allowing you to set up your password and access your account.

How to reach us.
'Contact Us' page inside the Hyfin Platform

Again, welcome to **Hyfin**!

Best regards,

Please Note: A standalone sale of Hyfin will not include training with Hyfin and you will only receive a training scheduling link for accounts with QuickBooks Online integration.

QuickBooks Online Integration Email:

Hi ____,

Your **Hyfin** service is live and ready to accept payments. An email has been sent allowing you to set up your password and access your account. The next step in the process is scheduling your training. The training will last approximately 45 minutes and require you to be at your computer, where you can access your account. Please schedule your training here: Schedule Now.

Hyfin's dedicated Support Team is here to provide you with the best experience possible. Whether you have questions or want to explore features, we are happy to help.

How to reach us.
Support Hours: Monday-Friday 8:00 am-5:00 pm CST
Call us at 913-370-7577
Email us at support@hyfin.app
'Contact Us' page inside the Hyfin Platform

Thank you,

- Hyfin's Onboarding Team will forward the training invite to the Clearent Sales Rep listed to be included in training.

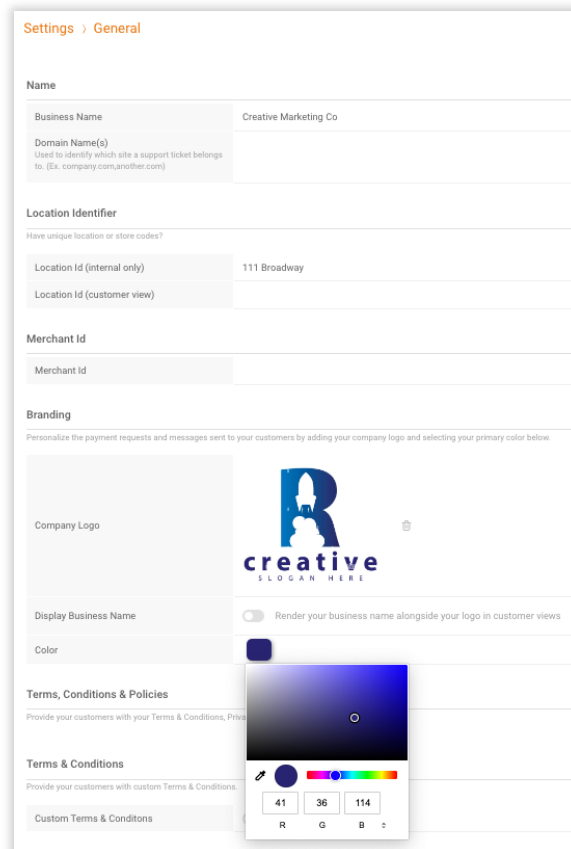## ③ Configuring Your Hyfin Merchant Account

After you receive your account email invite, have completed setup, and log into your Hyfin Merchant Account, you're ready to use helpful features including adding your logo and primary color, setting payment notifications and more. Below are instructions for setting up commonly used features on the platform to help ensure you are set up for success from the start!

To use these features, log into your Hyfin production account:

Hyfin Account

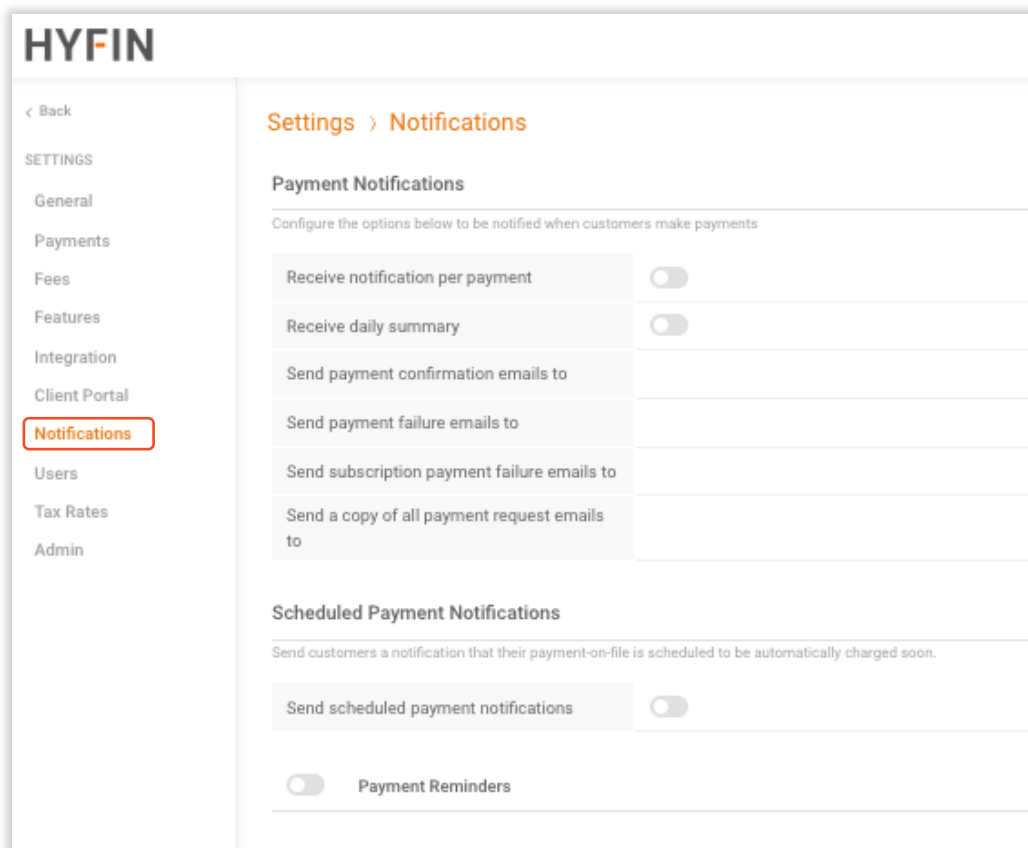## ④ Adding a Logo & Primary Color

- To add your custom logo and primary color, click on "Settings" and then select "General".

- Upload the logo and use the color dropper to pull in a color from the logo or enter RGB values. Please note, the logo cannot be white, or it will not show up.

5 Set Up Payment Notifications & Reminders

- From the "Settings" menu, select "Notifications".

  o Enable payment notifications to merchant via per payment or daily summary. These notifications can go to one or multiple emails.

  o Enable scheduled payment notifications for merchants with payment information on file reminding them that their payment will be processed soon.

  o Enable payment reminders on outstanding invoices.

HYFIN

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SETTINGS

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Settings › Notifications

Payment Notifications

Configure the options below to be notified when customers make payments

Receive notification per payment	
Receive daily summary	
Send payment confirmation emails to	
Send payment failure emails to	
Send subscription payment failure emails to	
Send a copy of all payment request emails to	

Scheduled Payment Notifications

Send customers a notification that their payment-on-file is scheduled to be automatically charged soon.

| Send scheduled payment notifications | |

Payment Reminders

6 How to Run a Test Transaction on a Device

- Access the Virtual Terminal on the left-hand navigation pane or through the drop-down arrow at the top middle of the screen.

- Toggle on "In-person Payment" and the device will be visible.
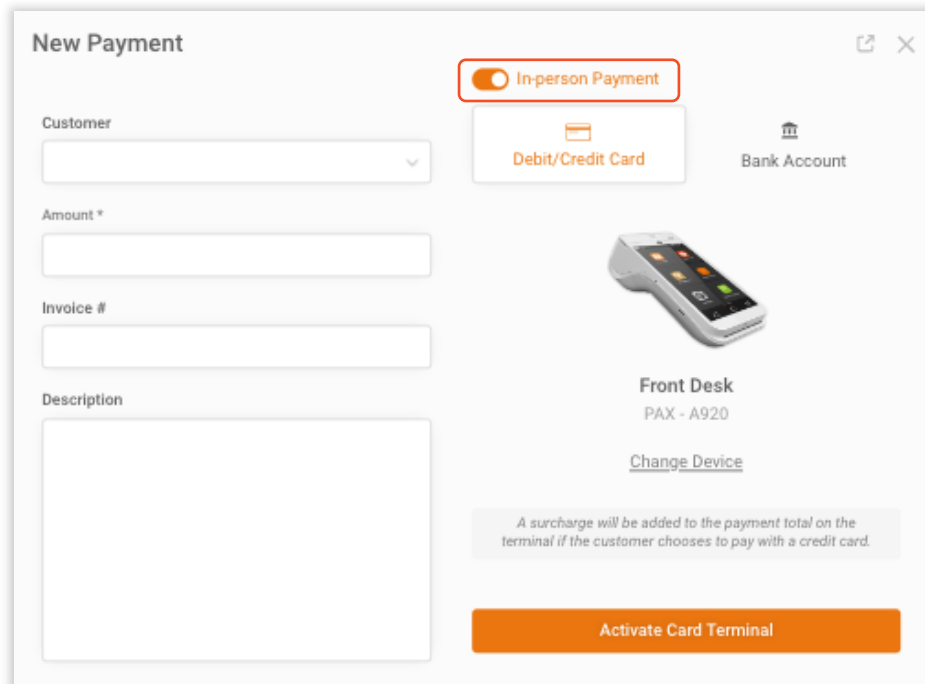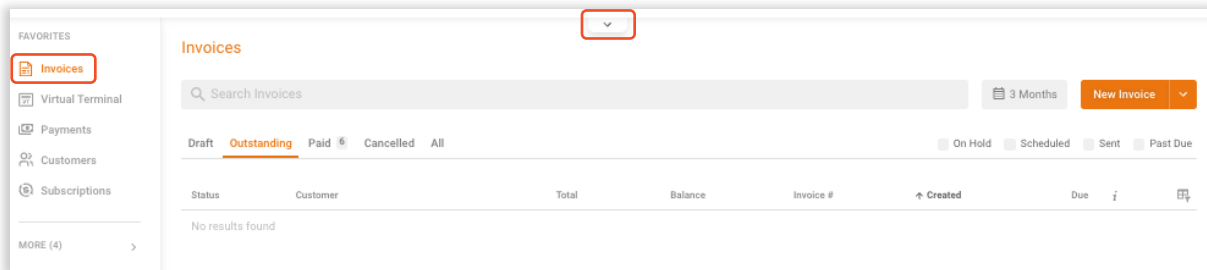
- Key in customer, amount, and select "Activate Card Terminal".

- The device will "wake up" to make payment.

- Once the payment is made, a successful payment response will appear on the screen within Hyfin.

- To Void the Test Transaction: Select the payment under the "Payments" tab, click the ellipsis (three dots in the upper right corner) and "Process Refund". If refunded before the batch out time the same day, it will void the transaction.
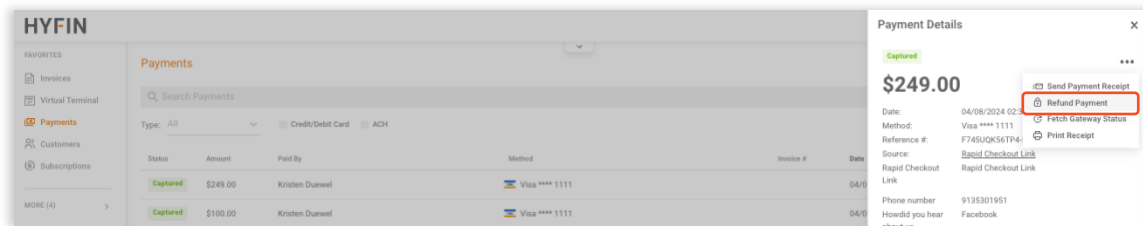

7 How to Set Up Interchange Optimization (Automated L2/L3)

- Using L2 or L3 interchange optimization? If so, use the following steps to get set up. From the "Settings" menu, select "Payments" and then "Interchange Optimization".

- L2: Set tax rate.

- L3: Set tax rate and complete the information shown below. Once this is set, we will pass along the following information along with specific transaction details to qualify for interchange optimization.

  The system will default to only passing the information on for qualified cards; however, there is an option to send the data through on all cards which is not the norm.

  There is also an option to hold all eligible transactions for review. If this is enabled, the merchant will have until the batch out time set to review and make changes to the data which is also not the norm.

6
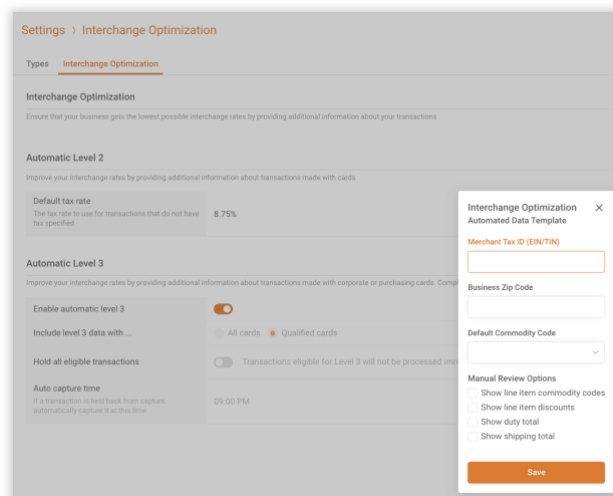
8 Get Support

Please contact the Clearent Customer Support Team with questions or support needs. This team will escalate to Hyfin as needed. Escalated support inquiries can be directed to Support@hyfin.app. Please include the merchant DBA and contact information if you are sending it on behalf on your customer.

Hyfin Support Contact Information:

Support Hours: Monday – Friday 8:00 am – 5:00 pm

Support Phone: 913-370-7577

Email Support: support@hyfin.app

Hyfin Sales Contact Information:

Email: sales@hyfin.app

Schedule Merchant Demo with Clearent's FIP team

Schedule time with Hyfin's sales team to learn more about the product

Hyfin Training

Hyfin Training Center   **Hyfin FAQ**