Quick Start Guide

Getting started with StudioPay? This guide will teach you the basics.

In this guide:

Who is this guide for?

Interior Design firms looking for a fully integrated payments solution built to meet their specific needs.

Why StudioPay?

Managing payments is now easier than ever with StudioPay, the payment processing platform designed for Interior Designers. Our competitive fees, robust features and simple sign-up process will have you collecting and reconciling payments from your clients in no time.

Fees for StudioPay Transactions

Credit Card:
3.0% + .60 cents per transaction

ACH:
1% up to $10

Refer to StudioPay Funding and Limits for more details

Key Features

✓ Interior Design-Centric

✓ Gross Settlement

✓ Higher and More Flexible Limits

✓ Unparalleled Client Experience – simple yet intuitive

✓ Studio Designer's Dedicated Support Team

Learn more here: StudioPay Frequently Asked Questions

Step 1:
Gather your information

Applying for a StudioPay account is simple, but you'll want to make sure you have some key company information and documentation on hand. This will allow our risk team to approve your application quickly.

Information Checklist and Application Documents

COMPANY'S INFORMATION
☐ Company's EIN
☐ Business Establishment Date
☐ Annual Processing Volume
☐ Average Transaction Amount
☐ A Bank Account to Connect
☐ Voided Check (for manual bank entry)

OWNER'S INFORMATION Individuals who own 25% or more of the business
☐ Full Legal Name
☐ Date of Birth
☐ Social Security Number
☐ Address
☐ Ownership %
☐ Business Title

If you expect transactions exceeding $10,000 or an forecast your annual processing volume to exceed $600,000:

>> Provide 3 months of processing statements or bank statements

Step 2:
Create your account

Now that you've gathered your company information and documents, it's time to set up StudioPay.
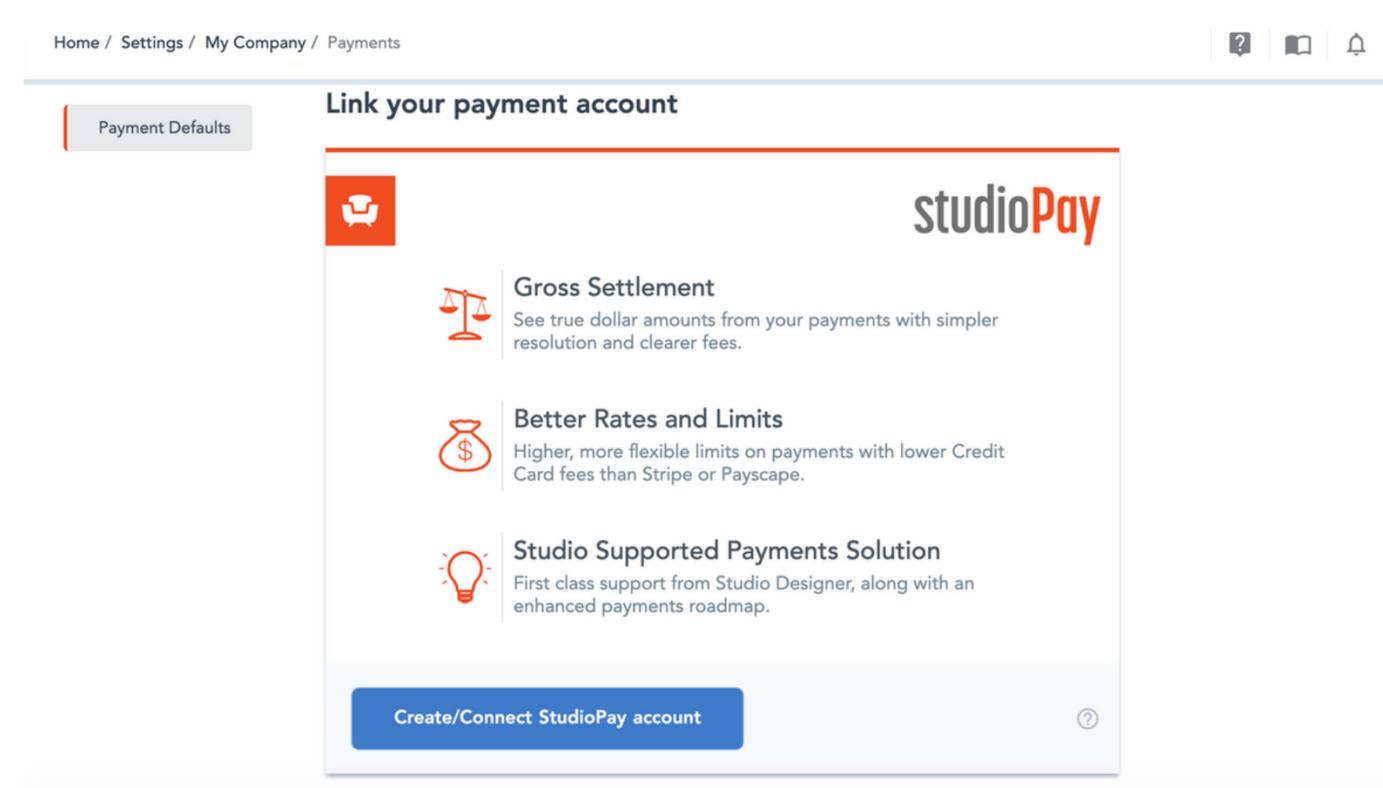
Set up StudioPay

To apply and set up StudioPay:

1. Go to Settings > My Company > Payment Defaults

2. Under Link Your Payment Account, click Create/Connect StudioPay Account to access the application

_____

Next:

Follow the prompts to fill out some basic information about your business.

Step 3:
Enter Business and Owner details

Now that you have gathered all of the necessary information

and documents, it's time to set up your account.

Fill out your Merchant Application

Follow the prompts to fill out some basic information about your business.

01 **02** **03** **04**
BUSINESS **OWNERS** **BANK** **TERMS & CONDITIONS**

> 1799 - Contractors - Special Trade, Not Elsewhere Classified is the recommended MCC Code most commonly used for the Industry drop-down.

BUSINESS

1. Select the Country and Business Type to expand the form.

2. Fill out the Business Overview, Details, Address, and Account Login sections.

> **Tip:** In the Account Login section, your Studio Designer credentials will not be accepted. For added security and privacy around your sensitive financial details, StudioPay has its own login. Treat StudioPay like you would treat a banking application.

OWNERS

Enter the information for Owner Information and Owner Address sections.

Note: Physical Address (P.O. Boxes not accepted)

> **Tip:** You'll want to add information for anyone who owns 25% or more of the business.

Step 4:
Add Bank information

01
BUSINESS

02
OWNERS

03
BANK

04
**TERMS &
CONDITIONS**

BANK

1. Add your bank information by selecting one of the below options:

   >> Link Existing Bank Account (via Plaid)

   >> Enter Bank Info Manually

Tip: Bank accounts can be connected by securely logging in to your online banking application through Plaid or manually entering information. For faster processing, we recommend authenticating with Plaid (this will be the only instance Plaid will be used in StudioPay).

Entering the account manually will require uploading a voided check. Otherwise, you can skip this step.

2. If you expect individual transactions in excess of $10,000 or your annual processing volume exceeds $600,000:

   In the Document Upload section, upload 3 months of processing statements or bank statements

For lesser transactions and volume – skip the Document Upload section

Step 5:
Complete the Registration

T E R M S   &   C O N D I T I O N S

1. Read, agree, and consent to the Bank Disclosure Page and Merchant Terms and Conditions.

2. Select the applicable check boxes.

3. Click Sign Up.

An email confirmation from studiopay@studiodesigner.com is on the way, don't forget to confirm your user account!

For more detailed sign-up instructions read: StudioPay Account Setup

Tip: You must click and open each link before you can submit the application!

You're all set!

While your application is under review, you'll notice the "Waiting for activation" status on Studio Designer's Payment Defaults page. Once our risk team approves your account, the status will be replaced with a link to access your StudioPay Dashboard.
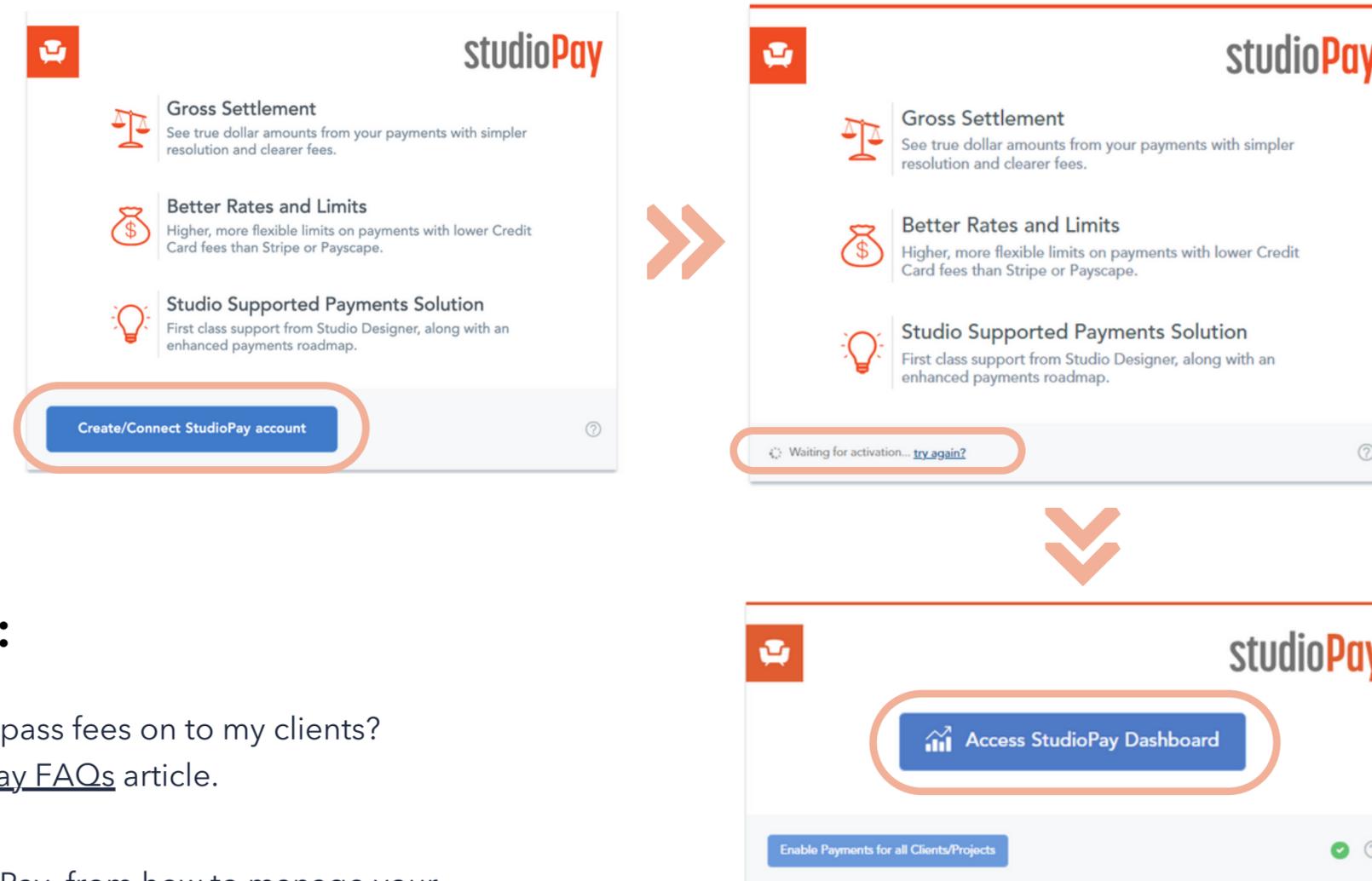
In the meantime, check out our resources:

>> How long does the verification and approval process take? How can I pass fees on to my clients?
You can get the answers to frequently asked questions in our StudioPay FAQs article.

>> Review the StudioPay Toolkit to understand the ins and outs of StudioPay, from how to manage your transactions to reconciling a disbursement.

>> Begin to explore Dashboard features, including Flagged Transactions, Sales & Refunds calendar, and more with our StudioPay Dashboard Guide.