Aliste
MARKETING COLLECTIVE

The Essential Guide to
HubSpot Payments

It's time to grow your business. Are you ready to accept payments instantly, build new revenue streams, and create a seamless, end-to-end experience for your customers - all the way through the purchasing process?

With HubSpot Payments, you can deliver a better buyer experience and accept payments in less time, with fewer tools, directly inside your CRM.

What is HubSpot Payments?

HubSpot Payments allows you to confidently and seamlessly accept payments right alongside the HubSpot CRM. You can sell online in new ways, including touchless selling from your website, event registrations, membership sign ups, paywall for digital content and more.

Bring your business online.
Start accepting payments instantly.

When you start using HubSpot Payments, you eliminate the operational headaches associated with paper checks and cobbled-together solutions that create friction for your team and your buyers.

Save time and speed up your buyer's process by taking advantage of HubSpot's payments tools, including payment links, recurring payments, payments-enabled quotes and more!

Here's what you'll love about HubSpot Payments:

HubSpot payments works with many of the HubSpot features you know and love.

Payment Links

Generate payment links directly from your HubSpot portal and embed on your website, or share them directly with customers via email, forms, meeting links, chat, and quotes.

Available in:

All Hubs, Starter, Professional, Enterprise (US Only)

Recurring Payments

Leverage recurring payments to automatically charge your customers on a set schedule. Because recurring payments create subscription records inside of HubSpot, you can do just about anything with them, including using them in lists and automated workflows.

Available in:

All Hubs, Starter, Professional, Enterprise (US Only

Payments-enabled Quotes

You can collect payments from your customers using a sales quote that is integrated with the payments tool. This works with both one-time and recurring payments.

Available in:

Sales Hub only, Starter, Professional, Enterprise Plans (US Only)

Plus, even more ways to sell...

All of this can be done in a few easy steps. No code required.

Paid Meetings

Associate a payment link to a meeting scheduling page, so you quickly and easily get paid for your time.

Available in:

All Hubs, Starter, Professional, Enterprise (US Only)

Forms

Start accepting payments right after your customer submits a form.
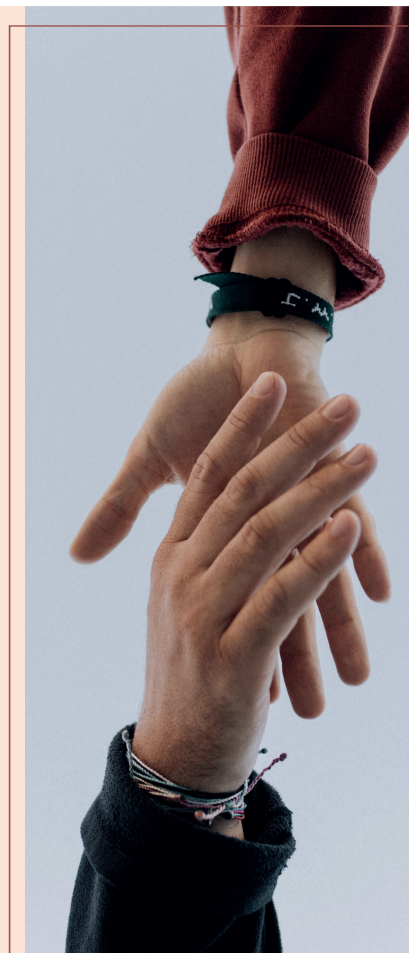
Available in:

All Hubs, Starter, Professional, Enterprise (US Only)

Marketing email

Add payments to your marketing emails in seconds.

Available in:

All Hubs, Starter, Professional, Enterprise (US Only)

Manage your payments in the CRM

Managing your payments has never been easier. Each time your customer makes a payment, a payment record is created and reflected in the CRM. This way, you can unlock the true power of the HubSpot platform by triggering automation and reporting.

Payments in Action

Finally - no more disconnected, cobbled tools. With HubSpot payments, successfully guide customers through their entire purchase with a seamless system that works with them each step of the way.
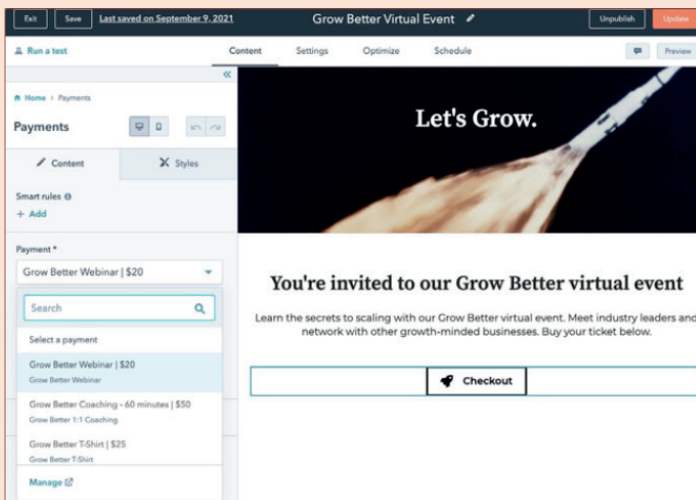
Payment links are the most flexible way to accept payments right in the HubSpot CRM. You can use them to sell your product or service on a one-time and/or recurring basis. Just hover over the "Action" button to reveal the URL, and paste or embed the link anywhere.

Pro tip: some great places to share payment links include email, chat, quotes, forms and meetings.

Basic Subscription

Basic Subscription

Actions ▾

▾ About this subscription

Status
● Active

Next payment due date
05/15/2022

Start date
04/15/2022

End date
04/14/2023

Number of expected payments
12

Number of completed payments
1

Last payment amount
$500.00

Recurring billing frequency
Monthly

Payment method
ACH_DEBIT - 6789

Total collected amount
$500.00

Monthly recurring revenue
$500.00

Annual recurring revenue
$6,000.00

Signature and Payment

Signature options
● No signature
○ Include space for a written signature
○ Use e-signature

Payment options
○ No payment
● HubSpot Payments

Accepted forms of payment *
☑ Credit or debit card
☑ ACH (bank transfer) ⓘ NEW

Billing address
☐ Collect billing address for credit card purchases ⓘ

Shipping address
☐ Collect shipping address ⓘ

○ Stripe

Have a business model that runs on memberships, retainers, or ongoing donations? Never worry about remembering to schedule payments again. Embrace the full power of automation with HubSpot's Recurring **Payments.**

Pro Tip: Because recurring payments create subscription records inside of HubSpot, you can do just about anything with them. Use them in your lists and your workflows to notify customers before the payment is due, or send out an internal reminder to your sales reps to follow up before the end of a subscription. This is a great tool to ensure your customers are receiving an easy, effortless buyer experience during each payment cycle.

Collecting payments on quotes? Payments directly connects with HubSpot's quoting tool. Now when you generate a quote, you can seamlessly enable your customer to accept the quote and enter their payment information in one step. This gives your customer a modern, streamlined buying experience, and speeds and simplifies your quote-to-cash process. And this works whether the quote is for a one-time purchase or a recurring purchase.

Sales Hub only: Starter, Professional, Enterprise

Ready to start getting paid for your time? Now you can associate HubSpot payments **to the meetings scheduling tool, so you can** collect payments each time someone schedules time with you.

Pro Tip: We see many customers use this tool to develop a new revenue stream like selling consulting and/or coaching services!
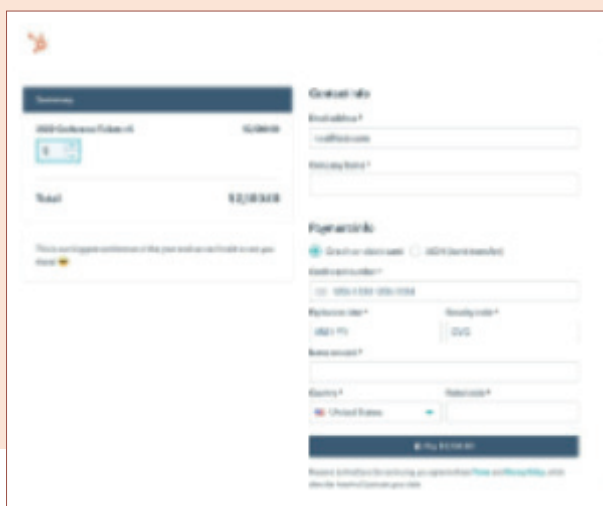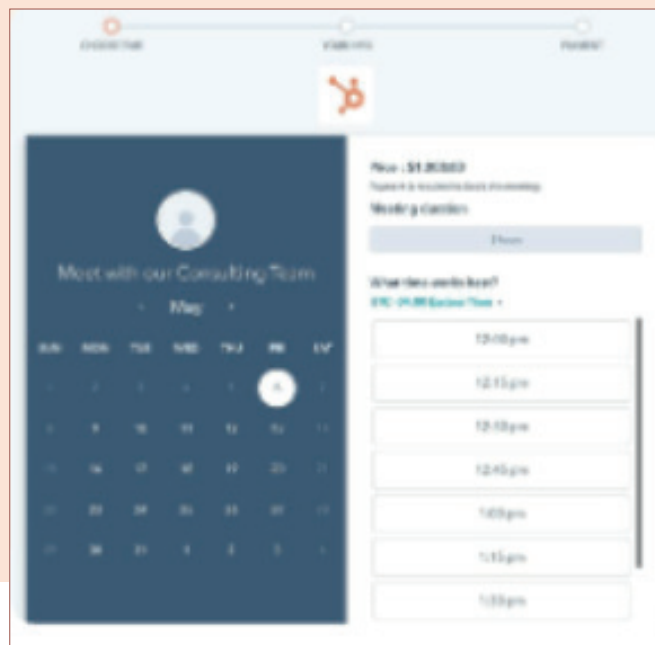
Delight your customers with a modern checkout experience to collect as much or as little information you need to make the sale. Give your customers control to select their desired product quantity, define the amount they want to pay on a payment link, and enable associated discounts on your customer's purchase.

Send your accounting team all the information they need from your HubSpot payments **transaction with HubSpot's integration with QuickBooks Online.**

Pro Tip: With HubSpot's invoice sync, you can view all the invoice data in HubSpot without leaving HubSpot.

Frequently Asked Questions

How do I set up HubSpot Payments?

To get started, you will need to set up a HubSpot Payments account.

To set up payments, you must have significant managerial control of the company. That could mean you're an owner, executive, senior manager, or someone in a similar role. If that's not you, add the right person to your account and make them a super admin.

Navigate to Sales > payments to start the enrollment process. You'll need about 15 minutes to answer questions about your company and identity. Then, your application will go through HubSpot underwriting, which usually takes 2-3 business days.

Who is eligible to use the payments tool?

Your business or organization must be located in the US, have a US bank account, and must be using a paid version of HubSpot. In the future, HubSpot may expand eligibility to customers located in additional countries.

You may not be eligible if your company is in a high-risk industry, or sells certain products or services.

Payments is powered in part by Stripe, and they don't accept payments for some types of businesses. You can find more details and examples in Stripe's **restricted businesses list.** Keep in mind that this isn't a complete list, and all businesses are reviewed on an individual basis.

I noticed that to set up HubSpot Payments, I am asked to provide personal information as well as information about my business, including ownership information and legal structure. Why does HubSpot require this?

Payment processing is subject to financial laws and regulations that are aimed at preventing money laundering, funding of terrorism and other illegal activities. To satisfy these regulations, HubSpot and other payment service providers are required to verify basic information about the business entity, its primary owners, and the individual who will serve as the authorized representative for the payments account. These obligations are referred to as the "know your customer" (KYC) rules. In addition, HubSpot will also use this information to mitigate fraud that could impact you or HubSpot.

When a payment is made, is it possible for users to get notified?

Yes! You will receive an email notification any time one of your customers makes a payment. To turn notifications off, navigate to: Settings > Notification > Email > Notification Topic (general) > Payment.

Pro tip: you can also create payment and subscription-based workflows to set up notification cadences however you see fit!

Can US-based businesses accept payments from buyers outside the US?

Yes, you can accept card payments denominated in US dollars from buyers outside the US. We support global and regional card brands, including Visa, Mastercard, American Express, Discover, Diners, and Japan Card Bureau (JCB).

Is HubSpot Payments secure?

HubSpot Payments uses multiple layers of security to protect sensitive payment information. Your buyer's payment credentials are encrypted and tokenized to help ensure that unauthorized parties do not gain access to sensitive payment information.

Will users be able to report on the status of payments (ex. pending, completed, etc.)?

Yes, HubSpot has in-app reporting functionality that can inform you of the status of payments that you've received.

Does HubSpot Payments accept additional payment options outside of credit cards?

HubSpot Payments supports credit cards, debit cards and ACH debits. You can decide which payment methods to accept from your customers — cards, ACH or both. These options are available for both one-time and recurring payments.

How can I learn more about HubSpot Payments?

Here are a few of our favorite resources:

HubSpot's Knowledge Base
Payments Feature Page
HubSpot Academy

Please reach out and we would be happy to demo this feature and consult on how you can leverage this, while consolidating your tech stack.