

Get ready for embedded payments

A practical guide to help SaaS teams evaluate their stack and prepare for a smooth integration.



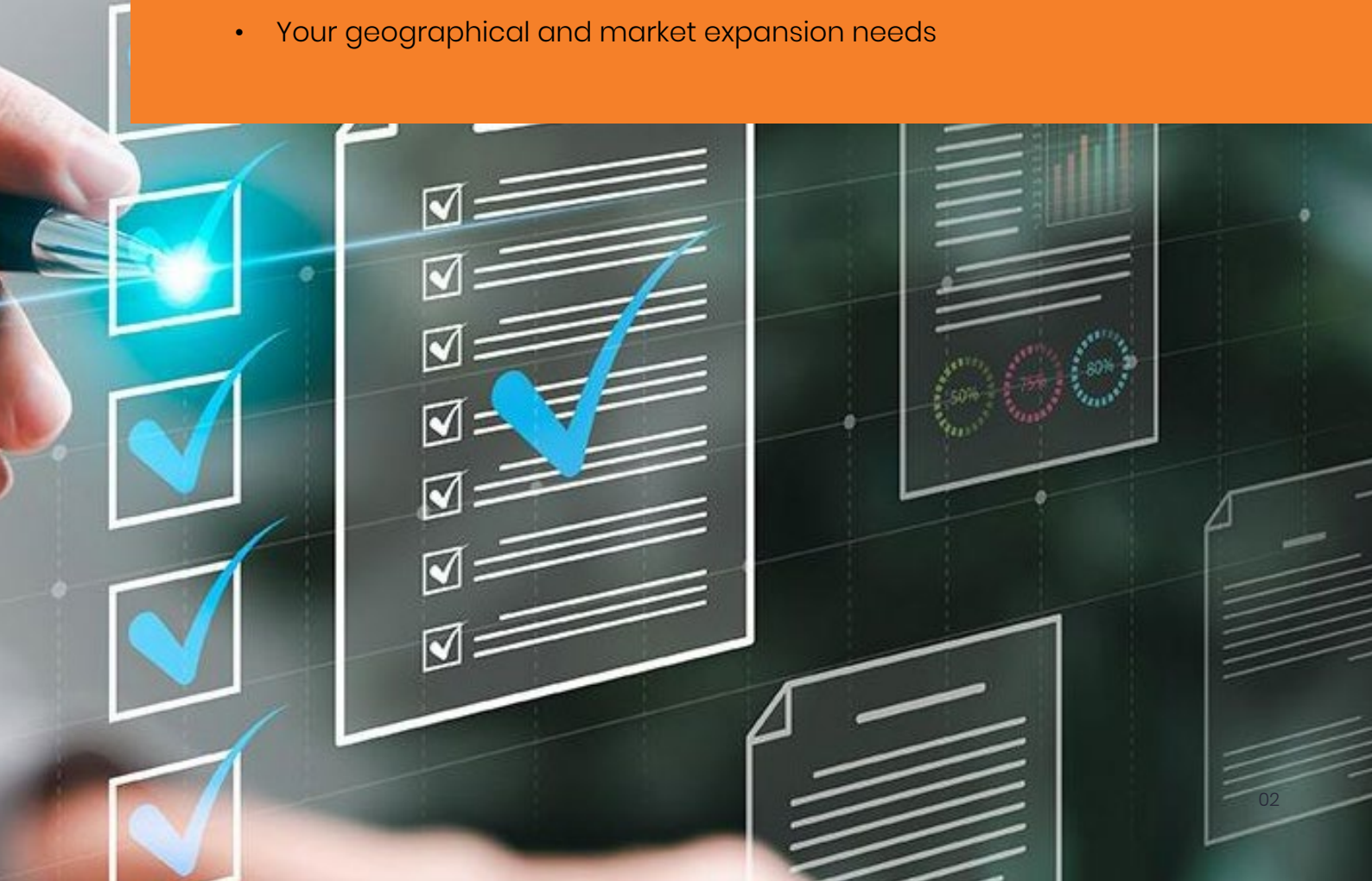
Why this checklist matters

Embedded payments can elevate your products' offering, improve merchant experience and create revenue opportunities but integration can be overwhelming without guidance. Ezipay supports you through every step with dedicated integration specialists, flexible APIs and a partner-first approach.

What's inside?

This checklist helps you assess:

- Your technical environment
- Your API capabilities
- Your billing workflows
- Your merchant onboarding needs
- Your operational readiness
- Security and compliance requirements for collecting payments
- Your geographical and market expansion needs



1. Product readiness

- ✓ Do you or your customers offer subscriptions, memberships or payment plans?
- ✓ Do your customers expect automated payment collection?
- ✓ Do you manage a CRM tool, a member management tool or other software tool designed to facilitate business management?
- ✓ Would embedding payments improve the experience for your customers and their end users?
- ✓ Are you ready to add a new revenue stream to your operations?
- ✓ Are you ready to grow your business?



2. Technical readiness

- ✓ Is your platform API-ready?
- ✓ Can you integrate with external endpoints securely?
- ✓ Do you have dev and QA environments available?
- ✓ Do you have a secure way to handle payment data and sensitive information?

3. Billing workflows

- ✓ Do your customers expect you to offer multiple payment methods?
- ✓ Do you need real-time updates or webhooks?
- ✓ Do your customers need flexibility with one-off and recurring billing?
- ✓ Do you need automated retries or tools to recover failed payments?
- ✓ Do you often need to pay suppliers, other businesses and third parties on an ongoing basis?
- ✓ Does your current payment flow allow for your customers to absorb payment related fees, or pass them on to end-consumers?

4. Merchant onboarding

- ✓ Do you have an onboarding flow for collecting customer details and payment information?
- ✓ Do you need simple, low-friction onboarding options for new customers?
- ✓ Do your end customers need help with data or understanding their customers' payment behaviours?

5. Operational support

- ✓ Do you have dedicated, multilingual support resources for payment queries?
- ✓ Do you need guidance on reconciliation or reporting?
- ✓ Are you prepared for payment disputes or failed payments?
- ✓ Do you have dedicated support flows for collecting and resolving payment issues, failed payments and disputed payments?

6. Ultra partnership

- ✓ Do you want dedicated support throughout implementation and beyond?
- ✓ Do you need customised API workflows?
- ✓ Do you value long-term partnerships with your suppliers?
- ✓ Do you need access to co-selling and co-marketing opportunities?





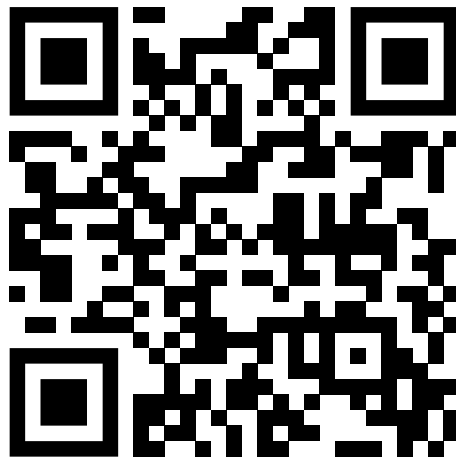
Why choose Ezipay

Ezipay provides hands-on integration support, guiding teams through each stage of the build and helping you design payment experiences that fit seamlessly into your platform. With custom API integration options, you can tailor payment workflows to suit your platform. Our deep expertise in subscription and recurring billing ensures reliable, scalable performance for complex billing models, all backed by infrastructure built to support multi-market growth as your SaaS expands.

Explore the right integration solution for your platform: hello@ezipay.com

EZYPAY®

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