Embedded payments provider relationships in software platforms

Data note · Edition 1.1 · Organisational credit: Acquiry Market Maps

Research question

What can a buyer establish about a payment provider from public evidence? We inspected ten product-specific assertions across eight software platforms, five named providers and nine distinct source pages. The underlying CSV records what each participant actually discloses.

Finding

Five rows document embedded infrastructure. One platform names its processor in its terms. Two rows document supported gateways, one covers an existing-only integration, and one records an announced expansion. The last three categories support a narrower statement than a verified, live customer contract.

Why a buyer should care

A software company may own merchant distribution while another business provides processing infrastructure. Counting a gateway listing as an active operator relationship can distort a target shortlist. The strongest next diligence request identifies the product, legal counterparty, market and active merchant base.

Reading and reproducing the data

The following pages carry every relationship and a direct publisher link. The matching CSV, dictionary, method and edition history accompany this note. Count each distinct record_id once. Group relationship_type to reproduce the five category totals.

Scope: a selected English-language sample. No market-share, exclusivity, sale intent or transaction-volume estimate is made. Dates for historical changes and dates of source inspection are distinguished in the ledger.

Platforms and providers I

Jobber / Stripe / Named processor

Jobber Payments. Jobber names Stripe, Inc. as the processor and reserves the right to change provider.

Terms dated 19 Dec 2025. Jobber Payments terms, section 3

Lightspeed / Adyen / Embedded infrastructure

Lightspeed Payments, hospitality. Adyen describes a move from referrals to a white-label payments offering for Lightspeed. The start date of the later white-label phase is unspecified.

Collaboration began in 2020. Adyen hospitality case study

Lightspeed / Tyro / Legacy integration

Restaurant POS, O-Series. Lightspeed retains instructions for merchants already using the Tyro integration. It restricts availability to existing enabled accounts.

Existing enabled accounts only. Lightspeed Tyro integration guide

Cloudbeds / Windcave / Supported gateway

Cloudbeds PMS, Australia and New Zealand. Cloudbeds lists Windcave as a supported gateway in Australia and New Zealand. The listing establishes compatibility.

Gateway list checked 13 Nov 2026. Cloudbeds supported gateways

Cloudbeds / Authorize.net / Supported gateway

Cloudbeds PMS, US, Canada and Australia. Cloudbeds lists Authorize.net for these three countries. The record covers a configuration option for properties.

Gateway list checked 13 Nov 2026. Cloudbeds supported gateways

Platforms and providers II

Mindbody / Stripe / Embedded infrastructure

Mindbody Payments. Stripe identifies Connect as the infrastructure Mindbody selected for its payments platform, including onboarding and payouts.

Case study checked 13 Nov 2026. Stripe Mindbody case study

Squarespace / Stripe / Embedded infrastructure

Squarespace Payments. Stripe says its Connect and Payments products provide payments infrastructure for Squarespace merchants. Squarespace launched its branded payments offering in 2023.

Branded rollout began in 2023. Stripe Squarespace case study

ROLLER / Adyen / Embedded infrastructure

ROLLER Payments. Adyen identifies itself as a payments infrastructure provider for the venue-management platform.

Partner listing checked 13 Nov 2026. Adyen ROLLER partner record

Fresha / Adyen / Embedded infrastructure

Embedded platform payments. Adyen describes an existing embedded payments relationship with Fresha while announcing a separate capital product. This row covers payments.

Provider disclosure checked 13 Nov 2026. Adyen Fresha announcement

Toast / Adyen / Announced expansion

US expansion of payments partnership. Adyen announced that its Toast partnership would expand into the US, building on an earlier relationship in other countries. Merchant rollout remains unspecified.

Announced 10 Aug 2026. Adyen Toast announcement

Method, interpretation and correction

Unit of analysis

Each row identifies one platform, product scope, named provider and role. We preserve an actionable primary source, a time scope and an inspection date. A provider case study is attributed to its publisher. A press release quoted by five websites remains one underlying disclosure.

What survives a challenge

A source explicitly naming a processor supports that role for the relevant product and period. An integration guide can establish support for a compatible option. Whether any single merchant selected it remains a separate question. Missing evidence leaves the supplier unknown. Evidence against a claim requires affirmative, scoped support.

An example with two true statements

Adyen describes infrastructure for Lightspeed’s branded payments, while Lightspeed documents Tyro in its O-Series for already-enabled accounts. Neither assertion cancels the other. The product boundary is what allows both to be correctly represented.

Coverage and changes

This sample favours accessible primary sources and firms willing to discuss implementations. It cannot establish real-world classification accuracy. For a correction, identify the stable record ID, old and proposed assertion, date, and public evidence. A new edition should preserve prior published data, document each material change and recalculate its totals.

Suggested citation

Acquiry Market Maps. Embedded payments provider relationships in software platforms. Data note and dataset, edition 1.1. Research cut-off 13 November 2026. The Acquiry Market Maps dataset page links to each edition. For a single assertion, cite its record ID and underlying primary source.

Acquiry Market Maps dataset page

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