Customising a hosted payment page

A customisation guide for website developers

Version 1.0 May 2021
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About this guide

Welcome to this guide about Customising a hosted payment page.

This guide is for you if you are a developer working on a website for an online business. It may also be useful if you are a business owner who:

- Uses Cashflows services for processing online payments.
- Wants to add a page to your website that looks and feels just like your other web pages but is hosted by us.
- Wants to add a Cashflows ecommerce plugin.

For more information

The latest version of this guide is always available on the Cashflows website. You can also find a range of plugin installation guides there.

The following information is also available:

- Adding a hosted payment page to a website (PDF)
  An integration guide for website developers who want to add a hosted payment page

- Connecting with the Cashflows gateway (PDF)
  An integration guide for website developers

- Cashflows Go Guide (PDF)
  An introduction to Cashflows Go which is your online account with Cashflows. It gives you access to all your transaction data, payment tools and notifications.

- Payment processing response codes
  A full list of responses from our payment processing (acquiring) platform. These codes can help you to understand why and how a payment may not have been successfully processed.

- Becoming PCI DSS compliant
  If a website is not PCI DSS compliant, the business owner is responsible for any losses through fraud. Find out how to become compliant and avoid fines.

- Best Practices for Securing E-commerce
  Information about best practices as recommended by the PCI Security Standard Council.

- Website compliance
  Guidance including strong customer authentication and compliance with the Payment Services Directive (PSD2).

- Maximising Payment Success
  Our whitepaper about PDS2 Strong Customer Authentication.
Technical support

Our team of specialists can provide technical support during your integration with Cashflows. For live integration and technical help, you can:

- Email: techsupport@cashflows.com
- Phone: 0330 128 9855 Option 3

Customer Support

For live operational support, such as reconciliation, account changes, PCI set up and so on you can:

- Email: support@cashflows.com
- Phone: 0330 128 9855 Option 3
Introduction

To provide a seamless shopper experience, we offer the option to add a secure payment webpage that looks and feels like part of your website but is created and hosted by us. We call this a Hosted Payment Page.

Our Hosted Payment Page is a secure webpage that you can incorporate into a website. By connecting our Hosted Payment Page to your website, you are integrating with the Cashflows Gateway and all of the functionality that comes with it for processing online payments. You direct shoppers to our Hosted Payment Page where they check out and pay. We take care of the processing, including security aspects and many of the technical complexities. Then when we have finished the payment processing, we redirect the shopper back to your website.

You can use the default Hosted Payment Page as we provide it or you can customise the look and feel to match the other pages of your website. For example, you can add your logo, apply your branding, font, and colours.
For information about the features and benefits of using our a Hosted Payment Page, refer to Adding a hosted payment page to a website (PDF). This is our integration guide for website developers. It explains, with code examples, how to use API calls to incorporate a Hosted Payment Page into a website.

How you can customise a Hosted Payment Page

To strengthen your brand when your shoppers are making payments, you can display a Hosted Payment Page that carries your business branding and logo. Then when a shopper heads to check out, they are redirected to a page that has the same look and feel as the rest of your website.

You can use the default Hosted Payment Page as we provide it or you can use the customisation options in Cashflows Go. Although you can customise many elements of a page, it doesn’t mean that you have to customise all of them. One of the great benefits of using our Hosted Payment Page is that it has already been designed with web standards in mind so that you don’t have to think about these things.

You can choose what to change and what to leave as it is. We recommend that you consider changing the following elements as a minimum:

- Business logo. For information, see How to change the business logo.
- Colour of the text and background of the content header bar. For information, see How to change the content header.
- Page background colour or add an image. For information, see How to change the page background.
- Pay button. For information, see How to change the Pay button.
Further customisations that you can make include:

- The font

- The colour of the Back button and the border around the payment methods

- Some aspects of the payment method details area including text colour, border colour and thickness and more.

- The look of notifications.

- The colour of the text and links on the Disclosure page.
Draft and active pages

Draft and active pages are clearly marked in the Hosted Payment Page editor:

When you have finished customising your page and it's ready to publish, you need to activate it. For information, see How to activate a page.
Getting started

Before you start, you need access to Cashflows Go. Cashflows Go is your online account with Cashflows. When you first sign up with us, we send you a welcome email that includes the details that you need to sign into Cashflows Go. If you don’t know how to sign in, visit How to sign in to Cashflows Go on our website.

To start customising your Hosted Payment Page

1. Sign into Cashflows Go. If you don’t know how to sign in, visit How to sign in to Cashflows Go on our website.

2. From the Cashflows Go menu, select Configuration.


4. Select Add page or select the page that you want to customise.

You can create multiple Hosted Payment Pages, for example you can create different drafts to see how things look for a new campaign. Then when your page is ready, you Activate it. However, only one Hosted Payment Page can be active at a time.

Important: If you are using the integration (test) and production environments, you need to make the same changes in both environments. For security, it is not possible to copy between the integration and production environments.

For information about testing and going live, refer to Getting started with the Cashflows Gateway API (PDF on our website).

The sections that follow explain how to make the minimum customisation that we recommend.

Tip: We think that you will find our Hosted Payment Page editor consistent and user friendly. The steps for changing the colour of any part of a Hosted Payment Page are the same so we don’t repeat them in every section of this guide. You can always refer back to this section. If you still need help, you can contact Customer Support.

How to change the business logo

The default Hosted Payment Page has our Cashflows logo but you can replace this with your business logo.

1. From the Customisation menu, select Logo.

2. Select Use Custom Logo.

![Use Custom Logo](image-url)
3. Select **Upload image**. We recommend using a file in .PNG format. JPG is also acceptable.

4. Locate the logo file. The file must not be larger than 5 MB. The preview pane shows you how your logo will look if you save it.

You can remove it if you decide not to keep it and want to choose a different file.

5. To use the chosen logo file, select **Save changes**.

   A message is displayed to confirm that the page has been updated.

6. Select **Back** to return to the Customisation menu where you can choose more customisation options or exit the Hosted Payment Page editor.

7. When you have finished customising your page and it's ready to publish, you need to activate it. For information, see How to activate a page.

**How to change the content header**

The content header is the area at the top of the content pane, just below the logo.
You can change the colour of the text in the content header and the background colour, for example:

**Important**: Be sure to consider web standards for legibility and accessibility.

To change the colour of the text:

1. From the Customisation menu, select **Content Header**.
2. If you know the colour values, you can type them in:
3. Otherwise, you can select the current colour and choose from the colour palette.

![Text Color](image)

The preview pane shows you how the changes will look if you save them.

![Order: 020.04.345678 GBP 4012.95](image)

**Tip:** We think that our Hosted Payment Page editor is consistent and user friendly. The steps for changing the colour of any part of a Hosted Payment Page are the same so we don’t repeat them in every section of this guide. You can always refer back to this section. If you still need help, you can contact Customer Support.

The preview pane shows you how the changes will look if you save them. If you change something but decide not to keep it, you can always use the **Back** button to exit the editor and discard changes without saving.

When you have finished customising your page and it’s ready to publish, you need to activate it. For information, see **How to activate a page.**
How to change the page background

You can change the background colour of your Hosted Payment Page or you can add an image.

Note: You can set either a background page colour or a background page image but not both.

To change the background colour:

1. From the Customisation menu, select Page Background.
2. If you know the colour values, you can type them in:
3. Otherwise, you can select the current colour and choose from the colour palette.

   The preview pane shows you how the changes will look if you save them. If you change something but decide not to keep it, you can always use the Back button to exit the editor and discard changes without saving.
4. To keep your changes, select Save changes.

   A message is displayed to confirm that the page has been updated.
5. Select Back to return to the Customisation menu where you can choose more customisation options or exit the Hosted Payment Page editor.

   When you have finished customising your page and it’s ready to publish, you need to activate it. For information, see Activate your page.
To add a background image

The default Hosted Payment Page doesn’t have a background image but you can add one if you like.

**Note:** You can set either a background page colour or a background page image but not both.

1. From the Customisation menu, select **Page Background**.
2. Select **Upload image**. We recommend using a file in .PNG format. JPG is also acceptable.

3. Locate the image file. The file must not be larger than 5 MB.

The preview pane shows you how your page will look if you save it. You can remove the image if you decide not to keep it and want to choose a different one.

4. To keep your changes, select **Save changes**.

A message is displayed to confirm that the page has been updated.

5. Select **Back** to return to the Customisation menu where you can choose more customisation options or exit the Hosted Payment Page editor.

When you have finished customising your page and it’s ready to publish, you need to activate it. For information, see How to activate a page.
How to change the Pay button

You can change the look and feel of the button that shoppers click when they come to pay via your Hosted Payment Page.

To change the Pay button:

1. From the Customisation menu, select **Payment Method Details**.
2. Scroll down until you reach the Pay button options:

![Pay button options](image)

3. The steps for changing the colour of any part of a Hosted Payment Page are the same so we don’t repeat them in every section of this guide. You can follow the steps in How to change the content header.

4. To change the radius of the button border, increase or reduce the number of pixels.

5. The preview pane shows you how your page will look if you save it.

6. Select **Save changes**.

A message is displayed to confirm that the page has been updated.

When you have finished customising your page and it’s ready to publish, you need to activate it. For information, see How to activate a page.
How to activate a page

When you have finished customising your page and it’s ready to publish, you need to activate it.

**Note:** Only one Hosted Payment Page can be active at a time. When you activate a page, a previously active page automatically switches back to Draft.

To activate a page:

1. Display the Hosted Payment Pages page.

2. Point to the page that you want to activate.

3. Select the ellipsis (…) to display the **Activate** option.
4. Select Activate. A message is displayed to confirm that the page has been activated.

The active page is clearly labelled so that you can distinguish it from other draft pages.

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**How to deactivate a page**

If you want to delete an active page, you need to deactivate it first to return it to draft status.

To deactivate a page:

1. Display the Hosted Payment Pages page.

2. Point to the page that you want to deactivate.
3. Select the ellipsis (…) to display the **Deactivate** option.

4. Select **Deactivate**. A message is displayed to confirm that the page has been deactivated.

**How to delete a page**

It's good housekeeping practice to delete draft pages if you don’t intend to use them. Deleting unwanted pages saves storage space.

**Note:** You can’t delete an active page. You need to deactivate it first to return it to draft. For information, see **How to deactivate a page**.

To delete a page:

1. Display the Hosted Payment Pages page.

2. Point to the page that you want to delete.
3. Select the ellipsis (…) to display the **Delete** option.

4. Select **Delete**. A message is displayed to ask if you’re sure that you want to delete the selected page.

5. Select **Delete**. The selected page is deleted.

**How to rename a page**

It can be useful to rename a page, for example if you are using the same page for a different purpose.

To rename a page:

1. Display the **Hosted Payment Pages** page.

2. Select the page that you want to rename.

3. Select the ellipsis (…) to display the **Rename** option.
4. Select Rename.

5. Type the new name or title.

6. Select Update. A message is displayed to confirm that the page has been activated.

How to duplicate a page

For speed, it can be useful to duplicate a page instead of creating a new page. For example, if you have a page that is already how you want it, you can duplicate it and make one or two minor changes such as updating an image.

To duplicate a page:

1. Display the Hosted Payment Pages page.
2. Point to the page that you want to duplicate.

3. Select the ellipsis (…) to display the Duplicate option. A duplicate page is created without a name.

4. Rename the duplicated page. For information, see How to rename a page.

Testing

When you have completed the configuration described, we recommend that you carry out sufficient testing to ensure that everything is working as expected. For payments made in the Production environment, you can cancel or refund them, if required.

For more Information about testing and going live, refer to Getting started with the Cashflows Gateway API (PDF on our website).