



## Installing our plug-in for WooCommerce

How to plug Cashflows payment processing into  
your online business

Version 1.0 – May 2021



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## About this guide

Welcome to this guide to Installing our plug-in for WooCommerce. This guide is for Cashflows customers who are using our Gateway. It explains how to add Cashflows to a checkout by installing our plug-in for WooCommerce. There is also guidance on how to configure settings such as whether to store card details and so on.

## For more information

The latest version of this guide is always available on the [Cashflows website](#).

The following guides are also available:

- [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.
- [Adding a hosted payment page to a website \(PDF\)](#)  
An integration guide for website developers who want to use a payment page that we host.
- [Customising a hosted payment page \(PDF\)](#)  
A customisation guide for website developers.
- [Hosted payment page](#)  
A dedicated page on our website where you can find an overview and a link to the guide that covers how to customise a hosted payment page.

The following information may also be useful:

- [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 PSD2 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](mailto: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](mailto:support@cashflows.com)
- Phone: 0330 128 9855 Option 3



## Introduction

The Cashflows Gateway delivers a range of services designed to help you manage your business payments. One of the ways that you, as a merchant, can link your business to our gateway is by using our plug-in. Our plug-in uses a payment page that we host for you. You can customise it to match the other pages of your website so that customers have a seamless experience. For more information, refer to [Adding a Cashflows hosted payment page to a website](#) (PDF on our website).

This guide provides step-by-step instructions for installing the plug-in and configuring your system to process e-commerce payments with Cashflows.



## Getting started

Although it's not required, we recommend that you install the plug-in and perform some testing in a non-production environment, before using it for live transactions in your production environment. To support your testing, we have a specialised integration environment. If you need an integration account for testing purposes, email [techsupport@cashflows.com](mailto:techsupport@cashflows.com).

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

## Before you start

To start the installation process, you need:

- The Cashflows Gateway WooCommerce plug-in zip file, that you can download from the WooCommerce website. Save this file in a location where you will be able to find it when you come to upload it.

**Note:** You don't need to unzip the file but it should be saved on your computer.

- Access to Cashflows Go so that you can:
  - Collect your API access credentials. You need these during the installation process.
  - Customise a hosted payment page, if you choose to use one.
  - Enable Auto Capture for cards.

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.

**Important:** You need different credentials for the integration and production environments.

Before you can connect to our production environment for going live, you need:

- A production account
- Sign-in credentials

We provide these when your account has been approved. If you have not received these, email [support@cashflows.com](mailto:support@cashflows.com).



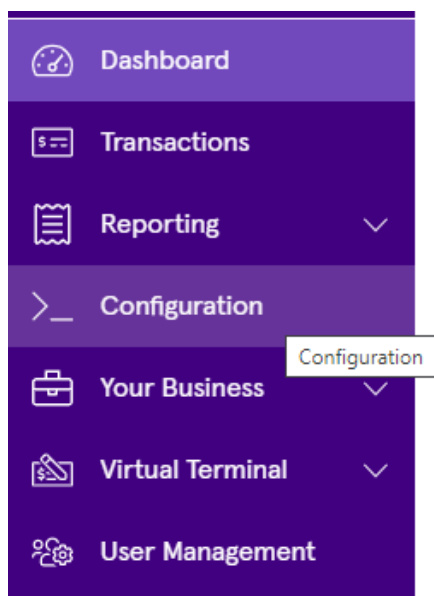
## Collect your API access credentials

To fill in the settings in WooCommerce, after you have installed the plug-in, you need to collect your API access credentials details from Cashflows Go. This is where you can find:

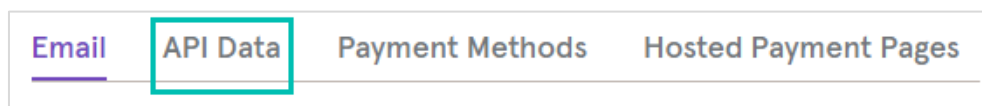
- **Configuration ID**  
This is the unique identifier of the business account (also referred to as the merchant account). You need to include this in API messages so that we can recognise the business and match transactions to it.
- **Current API key**  
This is the key to use for converting API messages that you send us to a format can't be tampered with (hashing)

To collect these details:

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**.



3. Select the **API Data** page.



The API Data page displays your API configuration details:

Use your ID and key to connect your website to our payment solutions.

Configuration ID	201226100000131072
Current API Key	922429b6-cc20-47d9-b509-ff5e287ceee5
New API Key	<a href="#">Generate a new API key for migration</a>

4. Copy these values to an intermediate document (or use your clipboard) as you will need them when you configure the plug-in settings later.

While you are signed into Cashflows Go, you can also enable/disable Auto Capture for cards, as required. For information, see [Enable/disable Auto Capture for cards](#).



### Enable/disable Auto Capture for cards

By default, the Auto Capture option for cards is enabled. When this option is enabled, we send both an authorisation (to reserve the funds on the card) and a capture request (for the funds to be transferred) to a shopper's bank. You can disable this option at any time.

To enable/disable Auto Capture for cards:

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. Select **Payment Methods**.

[Email](#) [API Data](#) [Payment Methods](#) [Hosted Payment Pages](#)

3. Select **Card**.
4. Set or clear the Auto Capture box.

**Card**

[Configuration](#)

☒ Auto Capture

☐ 3D Secure Required



## Customise the Cashflows hosted payment page

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.



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
- Colour of the text and background of the content header bar
- Page background colour or add an image
- Pay button

The image shows a mobile payment interface for 'Cashflows'. At the top, there's a header bar with the 'Cashflows' logo. Below this is a purple bar containing the text 'Order: Your order ref' and 'GBP 10.00'. The main content area is white and contains a 'Card' payment section. It starts with a '< Back' link and a card icon. The section is titled 'Use your saved card to pay' and lists two saved cards: '555555\*\*\*\*\*4444' (Expires 04/24) and '400000\*\*\*\*\*0002' (Expires 8/22). Below this is a section for 'Use a new card' with fields for 'Card Number' (0000 0000 0000 0000), 'Cardholder Name' (Full Name), 'Expiration Month' (MM), 'Expiration Year' (YY), and 'Security code' (000). There is a 'What is this?' link next to the security code field. A checkbox labeled 'Save payment information to my account for future purchases \*' is present. At the bottom of the form is a large purple button labeled 'Pay using Card'. Below the button is a small disclaimer: '\* By ticking this box you are giving your consent for us to store your card information for the sole purpose of your future payments in line with our information security policies.' and a 'Cancel payment' link. At the very bottom, it says 'This payment is securely processed by Cashflows' and 'Our [privacy statement](#)'. Annotations with arrows point to various elements: 'Business logo' points to the 'Cashflows' logo; 'Content header' points to the purple bar; 'Page background' points to the white background; 'Pay button' points to the 'Pay using Card' button.

For step-by-step instructions that show you how to customise a hosted payment page, refer to *Customising a hosted payment page* (PDF on our website).

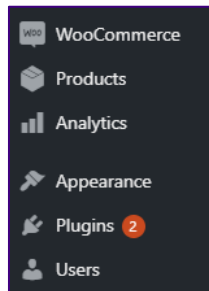


## Install our plug-in for WooCommerce

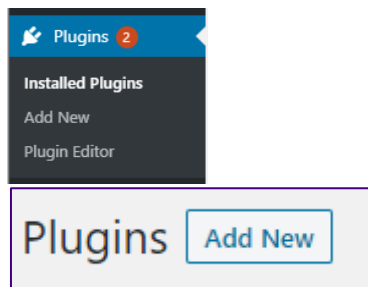
To install the WooCommerce plug-in, you need the plug-in .zip file that you have downloaded. The steps that follow, require that you have signed into your WooCommerce account, and are in the Site Admin section.

To install the plug-in:

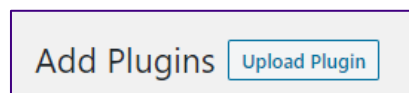
1. In the WooCommerce Menu bar on the left-hand side, select **Plugins**.



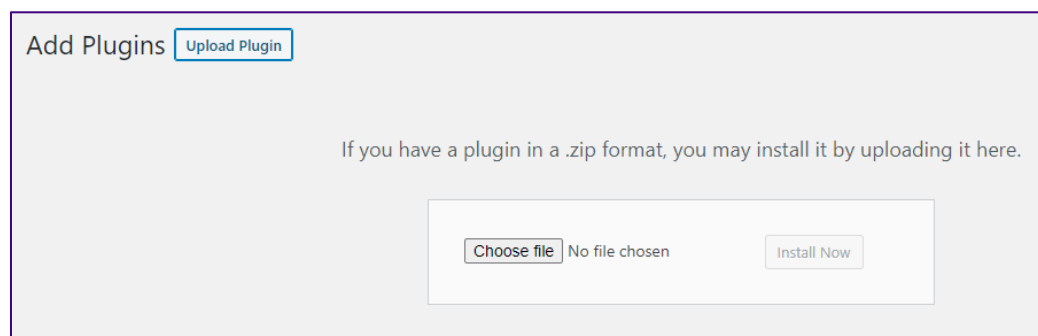
2. Select **Add New** (either from the sub-menu, or at the top of the page):



3. Select **Upload Plugin**:



4. Select **Choose File** and select the zip file that we sent you.



5. Select **Install Now**. The plug-in is be installed within your WooCommerce website.

**Important:** If you receive an error message, email the details of the error to [Technical Support team](#).



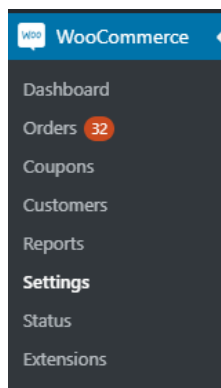
## Configure the plug-in settings

To configure the settings in WooCommerce, you need the API details that you collected from Cashflows Go. For information, see [Collect your API configuration details](#).

The steps that follow, require that you have signed into your WooCommerce account, and are in the Site Admin section.

To configure the [WooCommerce](#) settings:

1. In WooCommerce, select **Settings**:



2. Select the **Payments** page:

WooCommerce / Settings / Payments

General Products Shipping **Payments** Accounts & Privacy Emails Integration Advanced

**Cashflows**

The following options are required to use Cashflows

Production - API Key   
The API Key can be found on the [Cashflows Portal](#).

Production - Configuration ID   
The configuration ID can be found on the [Cashflows Portal](#).

Integration - API Key   
The API Key can be found on the [Cashflows Portal](#).

Integration - Configuration ID   
The configuration ID can be found on the [Cashflows Portal](#).

Integration mode ☒  
Please make sure you are using the correct credentials.

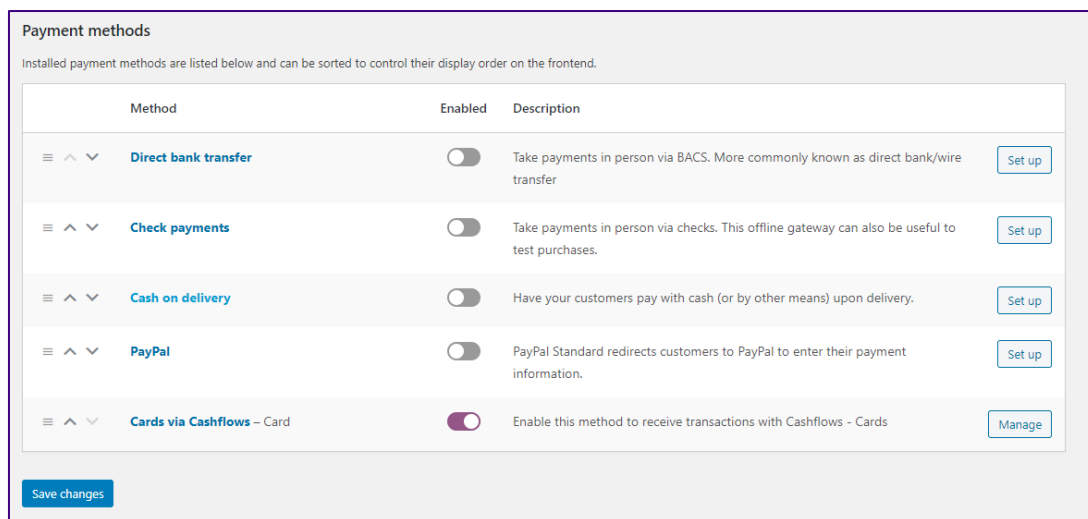
Google Analytics for Cashflows ☒  
Send the content of the Google Analytics cookie to CashFlows. This can only be sent if the Google Analytics is used and loaded.

Additional customer data ☒  
Send customer data to CashFlows  
Customer data is optional, if you do turn on this option, please note this in the privacy statement.

Store Customer data ☒

3. Enter the Production API Key and Production Configuration ID. These are the values that you should have collected from the production Cashflows Go (<https://portal.cashflows.com>).

4. If you are using an integration environment, enter the Integration API Key and Integration Configuration ID values that you collected from the test/integration Cashflows Go (<https://portal-int.cashflows.com>). Otherwise, you can leave these boxes blank.
5. If you are using an integration environment, set the Integration mode. Otherwise leave this box unchecked.
6. **Google Analytics for Cashflows**  
This option sends the content of the Google Analytics cookie to Cashflows. Set or clear this checkbox as required.
7. **Additional customer data**  
If you select this option, you will send customer data (for example, address and items purchased) to Cashflows to be stored with the payment. These details can be viewed together with payment transactions in Cashflows Go.  
  
**Important:** This requires that your terms and conditions alert the customer to the fact you are storing these purchase details. This is a GDPR requirement for which you, as the merchant, are responsible.
8. **Store Customer data**  
If you select this option, this enables Cashflows to securely store card details within your merchant account in the Cashflows Gateway. This feature gives your customers the option to securely save their card (as a token) so that when they return to your site, they will be able to select from their saved card(s). For security, the security code (CVV) is never stored and must always be presented by the shopper.
9. Scroll to the lower half of the Payment methods screen.
10. Ensure that **Cards via Cashflows** is Enabled as shown here:



11. Select **Manage** next to the **Cards via Cashflows** option.

General Products Shipping **Payments** Accounts & Privacy Emails Integration Advanced

**Cards via Cashflows**

Enable this method to receive transactions with Cashflows - Cards

**Cashflows**

[Go to documentation.](#)

Enable/Disable ☒ Enable Cashflows - Cards

Title

Customer Message

[Save changes](#)

12. In the Customer Message section, you can specify your own text for the payment option presented to shoppers on your checkout page:

Subtotal	£0.85
Shipping	Flat rate
Total	£0.85

**Card**

Pay Secure with Visa/MasterCard

Your personal data will be used to process your order, support your experience throughout this website, and for other purposes described in our [privacy policy](#).

**Place order**

13. Save your changes.
14. Select **Settings** again and select the **Payments** page.
15. Scroll to the bottom of the page and enable the **Cards via Cashflows** option:

**Cards via Cashflows** – Card ☒ Enable this method to receive transactions with Cashflows - Cards [Manage](#)

[Save changes](#)

16. Select **Save changes** again. Setup is now complete. You can start testing.



## 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).



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