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About This Guide

Welcome to the Cashflows WooCommerce Plugin Installation Guide. This document is designed to provide you instructions on how to install and configure the plugin and is for our customers using the Cashflows gateway. This guide assumes that customers are using WordPress | WooCommerce.

In addition to this guide, we have a team of specialists providing technical support during your integration with Cashflows. To receive support please contact our Implementation support team at techsupport@cashflows.com
Introduction

The Cashflows Payment Gateway delivers a range of services designed to help businesses manage their payments. One of the ways you as a merchant can link your business to our payment gateway is by using our WooCommerce plugin.

This guide will detail the steps necessary to install the plugin and configure your system to process ecommerce payments with Cashflows.

To start the installation process, you will need the following:

- The Cashflows Payment Gateway plugin zip file, supplied by Cashflows
- Access to Cashflows Gateway Portal (for either the test or Production environment)

If you do not have these items, please contact your Cashflows account manager or contact Cashflows support at support@cashflows.com

Although it's not required - we recommended that you install the plugin and perform some testing in a non-production environment, before using it for live transactions in your Production environment. We have a specialised Integration environment in place to support this activity.

This guide will cover the following steps:

- Customise your hosted payment page
- Install the Cashflows Payment Gateway plugin in WooCommerce, provided as a .zip file
- Configure your settings for the plugin
Customising the Cashflows Hosted Payment Page

To strengthen your brand when your customers are making their payment, you can customize your hosted payment page to include your logo and match your site’s colour scheme. Then when your customer head to check out, they will be redirected to a page that has the same feel as your webshop. By using the Cashflows hosted payment page (HPP) – where PCI compliance is provided by Cashflows – your customer will safely enter their card details and submit their payment. When the payment processing has completed, they will be redirected back to your site.

The payment page is highly customisable. We recommend at a minimum that you review the following elements for customisation, shown here on an unmodified page:

- Business logo
- Header bar
- Page background
- Pay Button

The HPP can be easily modified using the Cashflows’ gateway portal; it does not require any special technical skills. Having your logo available, and possibly a background image would allow for a great look. Having your colour choices available is also handy – though you choose from a palette.
Using the HPP Editor

To access the HPP editor, you will first log into the Cashflows portal, which can be accessed here:

- Test | Integration environment: [https://portal-int.cashflows.com](https://portal-int.cashflows.com)
- Production Environment: [https://portal.cashflows.com](https://portal.cashflows.com)

Please note if you are using both the Integration (Test) and Production environments, changes will be required in each environment; for your security, there is not a copy facility between the Integration and Production environments.

Once you have logged into the portal – as shown below – click on Configuration (1) in the left menu, select the Hosted Payment Page (2), then press Add page (3)

Give the page a name and click create, the editor will be presented.
Select your formatting element from the left menu, this will present the options for that element; for example, to change the colour of header bar (from purple), select content header:

Change the Content Header

For the Content Header element, you can modify the text and background colour. When you know the colour values, you can typed in the colour number, or alternatiely can choose a colour from the colour palette provided.

Once you are pleased with your choice, click on Save changes (at the bottom of the screen). You can abandon changes by skipping this process and just using the Back option.

When you are finished, click Back (top left on the screen) to return to the main panel.

To upload your company logo, click on the Logo option in the editor main menu bar, the settings will be presented:

Change Logo

Click on Upload Image to add your logo. Once the image appears, you need to check the Use custom logo box, and save the changes.
When you select Page Background from the editor main menu, you will be presented with options to

- set a colour for the background, and/or
- upload an image to be displayed in the background.

Once you are pleased with your choice, click on Save changes (at the bottom of the screen).

**Page Background**

To change the colour of your payment button, go to the Payment Method Details option in the editor main menu, scroll through the options until you get to ‘Pay Button Background colour’ where you can set the colour. Save your changes.

In order to activate your newly created customised Hosted Payment Page, do this

- Click Back to return to the main editor page
- Then click Exit Editor (top left of the screen.)
- The final step is to Active your payment page,
  - Press the ellipsis (…)
  - Select Activate (3rd option) as shown below:
Installing the Cashflows Payment Gateway Plugin for WooCommerce

To install the Cashflows Payment Gateway Plugin for WooCommerce, you will need the .zip file sent to you by Cashflows. The installation steps to follow, required that you have signed your WooCommerce account, and are now on its Site Admin section.

In the WooCommerce Menu bar on the left-hand side, click on the Plugins options.

Select the Add New option, either in the presented sub-menu, or at the top of the page:

You will be presented with this option, where you will select the Upload Plugin option:

A file selector option will be presented to you:

Click on Choose File and select the zip file sent by Cashflows from the location where you have saved the .zip file. Please note you do not have to unzip the file but it should have been saved to your computer.

Once the file has been selected - the Install Now button will be activated - now, click on Install Now and the plugin will be installed within your WooCommerce website.

If you receive an error message, please contact our Implementation support team; you can send the details of the error to techsupport@cashflows.com
WooCommerce Configuration settings

In order to fill-in the settings in WooCommerce, you will need to retrieve some details from the Cashflows Portal. Use the following steps:

1. Access the Cashflows portal, using the credentials your credentials – likely the same you used to create your customized HPP.

2. Select Configuration from the left-hand menu bar, then click on the API Data tab:

3. Copy these values to an intermediate document (or use your clipboard) as you will need them in your WooCommerce configuration
   - Configuration ID
   - API Key

Go back to your WooCommerce site (possibly you will need to re-enter your WooCommerce account and go to the Site Admin section).

To configure the plugin settings, click on Settings in WooCommerce:

On the screen that is presented click on the Payment tab at the top of the screen:
Edit the values on the Payments Setting page, as follows:

**Production API Key and Configuration ID**

Enter the values you retrieved from the Production Cashflows portal (https://portal.cashflows.com).

**Integration API Key and Configuration ID**

When you use an Integration environment, enter the values you retrieved from the Test/Integration Cashflows portal (https://portal-int.cashflows.com). Otherwise you can leave these entries blank.

**Integration Mode**

Check this box when you are Integration Mode (only testing, using the Cashflows Integration environment); otherwise leave this option unchecked.

**Google Analytics**

This will send the content of the Google Analytics cookie to Cashflows.

**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.
Checking this box, will send customer data to Cashflows to be stored with the payment; for example, address and items purchased. These details can be viewed within payment transactions within the Cashflows portal. (This requires that your terms and conditions alert the customer to fact you are storing the details of the purchases. – this is a GDPR requirement, which you as the merchant, are responsible.)

**Store Customer Data**

Checking this box, 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 credit card (as a token) so when they return to your site, they will be able to select from their saved card(s). The CVV is never stored and must always be presented by the customer for their security.

Moving to the lower half of the payment settings screen:

Ensure that Cards via Cashflows is Enabled as shown in the image above.

**Click on Manage for the Cards via Cashflows option**

In this section, you can specify your own text for the payment option presented to your customer, this will be shown, as seen below, as part of the Checkout page:
Save changes

Finally Click on Settings again and select the Payments tab, scroll to the bottom of the screen and enable the Cards via Cashflows option as shown below and once again Save changes:

Setup is complete.

Testing

Once you have completed the configurations above, we recommend you do conduct sufficient testing to ensure everything is working as expected. For payment made in the Production environment, you can cancel or refund them, if required.