



Installing our plug-in for WooCommerce

How to plug Cashflows payment processing into
your online business

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About this guide

Welcome to this guide to Installing our WooCommerce plug-in. 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 available from our [Cashflows Help Centre](#).

The following information is also available:

- [How can I test a payment request?](#)
- [Which shopping cart plug-ins are available from Cashflows?](#)
- [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 Cashflows hosted payment page](#) (PDF)
A customisation guide for website developers.
- [Payment processing response codes](#)
Our Cashflows Help Centre has a section of Developer information with explanations of response codes from our payment processing (acquiring) platform. These codes can help you to understand why a payment may not have been successfully processed.

The following information may be useful:

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

For support, you can find different ways to contact us in the Cashflows Help Centre: [Who can I contact for support?](#)



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 your customers have a seamless experience. For more information, refer to [Adding a Cashflows hosted payment page to a website](#) (in the Cashflows Help Centre).

This guide provides step-by-step instructions for installing the plug-in and configuring your system to process eCommerce 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 dedicated integration environment. For information, see [Testing](#).

What you need

To start the installation process, you need:

- The Cashflows Gateway WooCommerce plug-in file that you can download from the [Wordpress 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. For information, see [Collect your API access credentials](#)
 - Enable Auto Capture for cards. For information, see [Enable/disable Auto Capture for cards](#)
 - Customise a hosted payment page, if you choose to use one. For information, see [Customise the Cashflows hosted payment page](#)

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. You can also visit the Cashflows Help Centre and read: [How do I sign into Cashflows Go?](#)

Important: You need different sign-in 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, but if you have not received these, you can email 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 your:

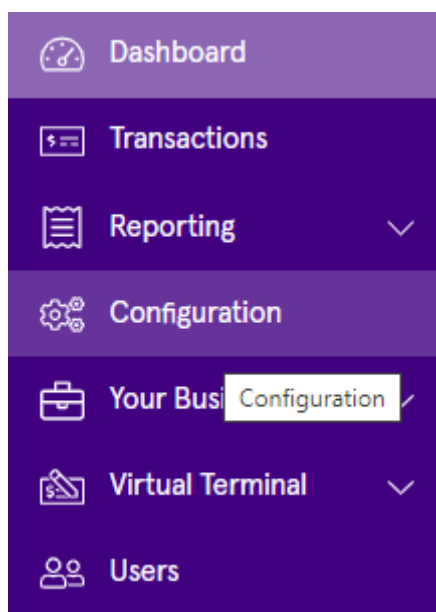
- **Configuration ID**
This is the unique identifier of the business account (also referred to as the merchant account). You need to include this in API messages so that we can recognise the business and match transactions to it.
- **Current API key**
This is the key to use for converting API messages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

To collect these details:

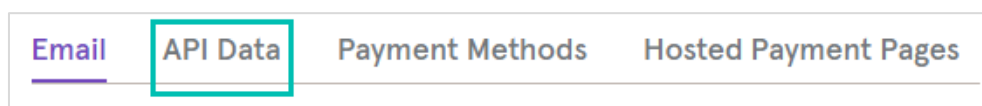
1. Sign into [Cashflows Go](#).

Tip: For step-by-step instructions, you can visit the Cashflows Help Centre and read: [How do I sign into Cashflows Go?](#)



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	e6d3ec72-7515-4774-81a5-5459b395ac0f	
New API Key	Generate a new API key	

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

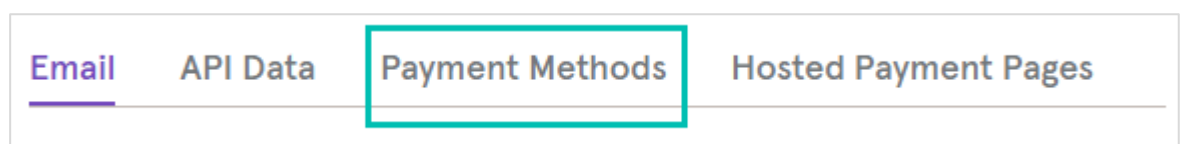
By default, the Auto Capture option for cards is enabled. When this option is enabled, we send both an authorisation (to reserve the funds on the card) and a capture request (for the funds to be transferred) to your customer's bank. You can disable this option at any time.

To enable/disable Auto Capture for cards:

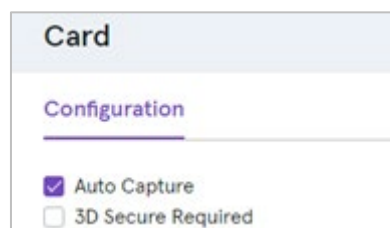
1. Sign into [Cashflows Go](#).

Tip: For step-by-step instructions, you can visit the Cashflows Help Centre and read: [How do I sign into Cashflows Go?](#)

2. Select **Payment Methods**.



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





Customise the Cashflows hosted payment page

To provide a seamless experience for your customers, 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 your customer 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 customer 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 screenshot shows a mobile payment interface for Cashflows. At the top, the 'Cashflows' logo is centered. To its left, the text 'Business logo' has an arrow pointing to it. To its right, the text 'Page background' has an arrow pointing to the top bar. Below the logo, a purple header bar contains the text 'Order: Your order ref' and 'GBP 10.00'. To the left of this bar, the text 'Content header' has an arrow pointing to it. Below the header bar, there is a '< Back' link and a 'Card' title with a card icon. The main content area 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, the option 'Use a new card' is selected. The 'Card Number' field contains '0000 0000 0000 0000'. The 'Cardholder Name' field contains 'Full Name'. The 'Expiration Month' and 'Expiration Year' fields are set to 'MM' and 'YY' respectively. The 'Security code' field contains '000' and a 'What is this?' link. Below the security code field, there is a checkbox for 'Save payment information to my account for future purchases *'. At the bottom, there is a large purple 'Pay using Card' button with an arrow pointing to it from the text 'Pay button' on the right. Below the button, there is a 'Cancel payment' link. At the very bottom, a footer note states 'This payment is securely processed by Cashflows Our privacy statement'.

For step-by-step instructions that show you how to customise a hosted payment page, refer to [Customising a hosted payment page](#) (available from the Cashflows Help Centre).



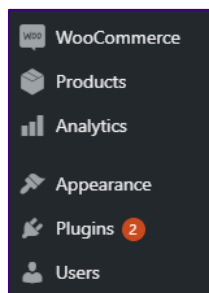
Install our plug-in for WooCommerce

To install the WooCommerce plug-in, you need the plug-in file that you have downloaded from the [WooCommerce website](#). Save this file in a location where you will be able to find it during the installation process

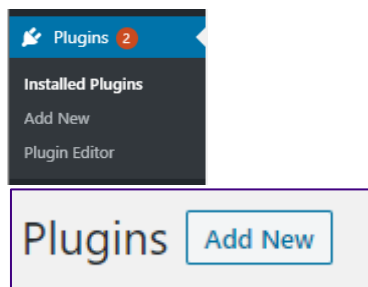
Note: The steps that follow require that you have signed into your WooCommerce account and are in the Site Admin section.

To install the plug-in:

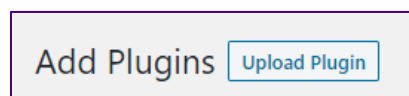
1. From the WooCommerce Menu bar on the left-hand side, select **Plugins**.



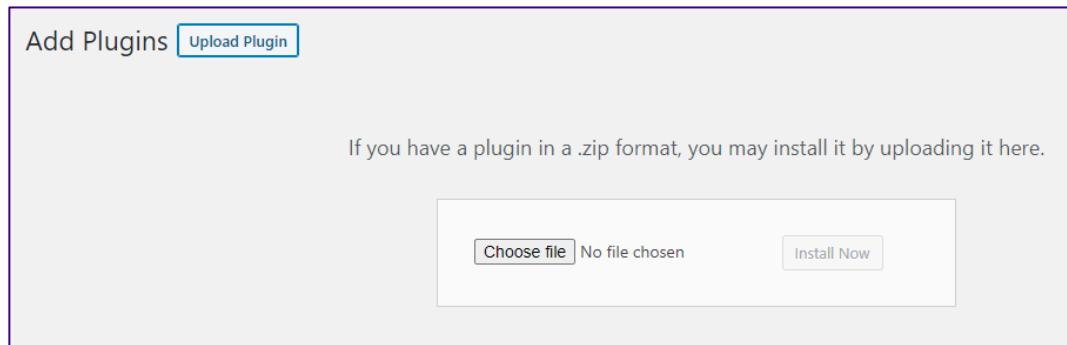
2. Select **Add New** (either from the sub-menu, or at the top of the page):



3. Select **Upload Plugin**:



4. Select **Choose File** and select the plug-in file that you downloaded.



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

Important: If you receive an error message, email the details of the error to support@cashflows.com.



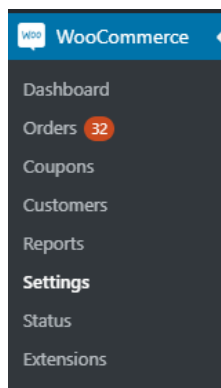
Configure the plug-in settings

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 version of 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 version of 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 customer.
9. Scroll to the lower half of the Payment methods screen.
10. Ensure that **Cards via Cashflows** is Enabled as shown here:

Payment methods

Installed payment methods are listed below and can be sorted to control their display order on the frontend.

Method	Enabled	Description
☰ ^ ▼ Direct bank transfer	<input type="checkbox"/>	Take payments in person via BACS. More commonly known as direct bank/wire transfer
☰ ^ ▼ Check payments	<input type="checkbox"/>	Take payments in person via checks. This offline gateway can also be useful to test purchases.
☰ ^ ▼ Cash on delivery	<input type="checkbox"/>	Have your customers pay with cash (or by other means) upon delivery.
☰ ^ ▼ PayPal	<input type="checkbox"/>	PayPal Standard redirects customers to PayPal to enter their payment information.
☰ ^ ▼ Cards via Cashflows – Card	<input checked="" type="checkbox"/>	Enable this method to receive transactions with Cashflows - Cards

[Set up](#) [Set up](#) [Set up](#) [Set up](#) [Manage](#)

[Save changes](#)

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 your customers 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:

Information

≡ ^ v **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, visit the Cashflows Help Centre where you can find:

- [Getting started with the Cashflows Gateway API](#) (PDF)
- [How can I test a payment request?](#)



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