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Customising a hosted payment page

A customisation guide for website developers

Version 2.0 August 2022

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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 plug-in.

For more information

The latest version of this guide is always available in the [Cashflows Help Centre](#). You can also find a range of plug-in installation guides there.

The following information is also available:

- [Cashflows Go Guide](#) (PDF)
An introduction to our online portal.
- [Adding a Cashflows 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

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



Introduction

To provide a seamless customer 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 customers 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.

The default Hosted Payment Page	An example of a customised Hosted Payment Page

Tip: You can design different pages for different promotions, such as Black Friday, Christmas, Easter, Diwali, Mother’s Day and so on.

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.

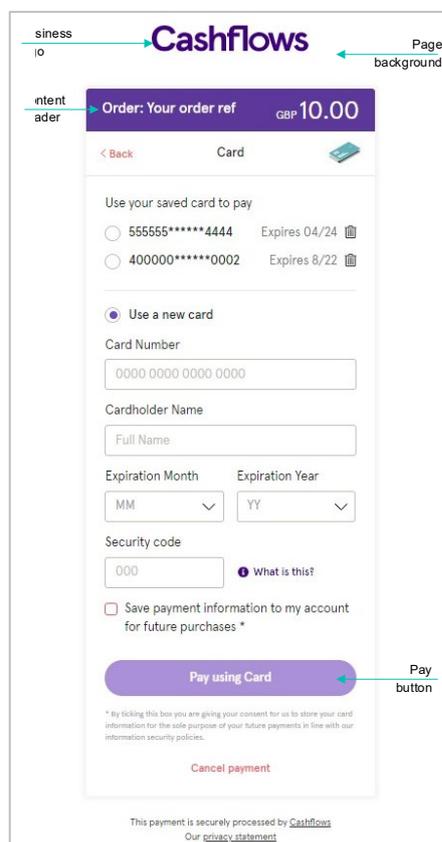
How you can customise a Hosted Payment Page

To strengthen your brand when your customers are making payments, you can display a Hosted Payment Page that carries your business branding and logo. Then when a customer goes 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](#).

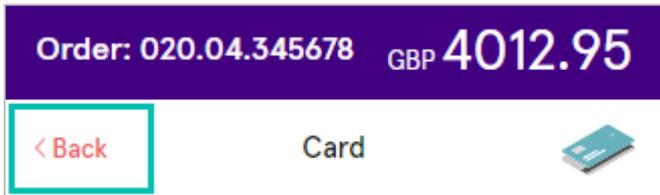


Further customisations that you can make include:

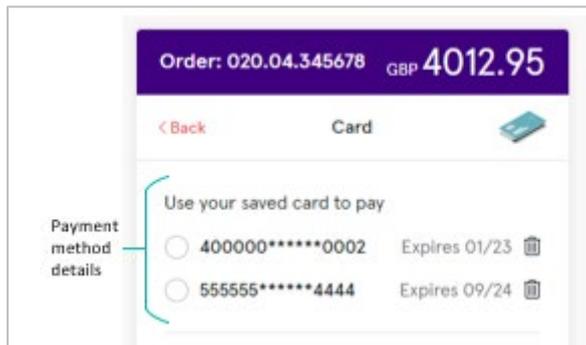
- The font



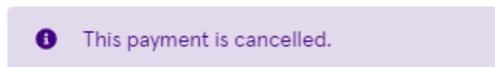
- The colour of the Back button and the border around the payment methods



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



- The look of notifications.

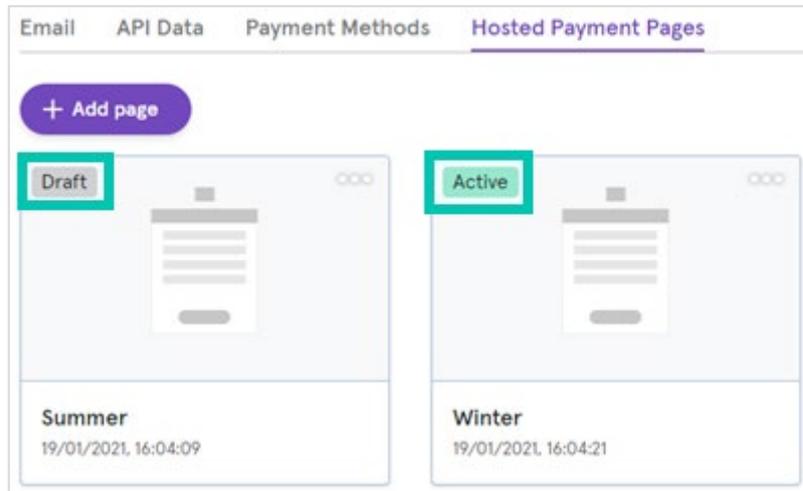


- The colour of the text and links on the Disclosure page.



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 our online portal . 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. .

To start customising your Hosted Payment Page

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.
4. To create a new page, select **+ New Hosted Payment Page**. Alternatively, select the page that you want to customise. The Editor menu is displayed.

Only one page can be active at any time but you can create drafts to see how things will look for a new campaign. You can also prepare different pages for different promotions, such as Black Friday, Christmas, Easter, Diwali, Mother's Day and so on. Then you can Activate whichever page you want to display.

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 [Adding a hosted payment page to a website](#) (PDF) in the Cashflows Help Centre .

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 our Customer Support: support@cashflows.com

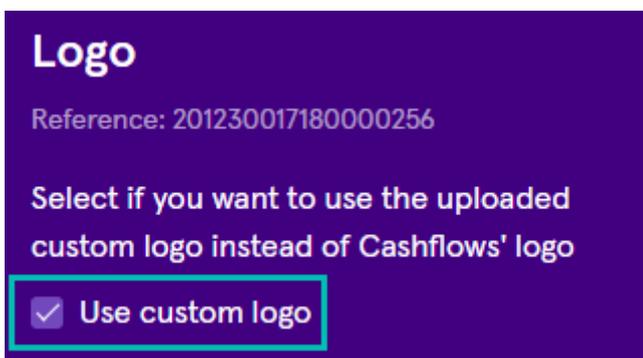


How to change the business logo

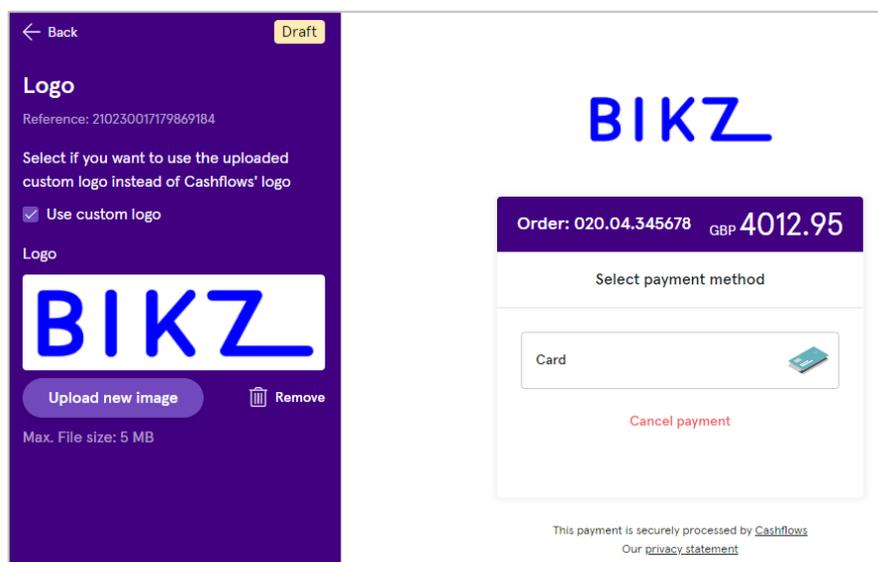
The default Hosted Payment Page has our Cashflows logo but you can replace this with your business logo.

To change the business logo:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.
4. Create a new hosted payment page or select the page that you want to change.
5. From the Editor menu, select **Logo**.
6. Select **Use Custom Logo**.



7. Select **Upload new image**. We recommend using a file in .PNG format. JPG is also acceptable.
8. 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.



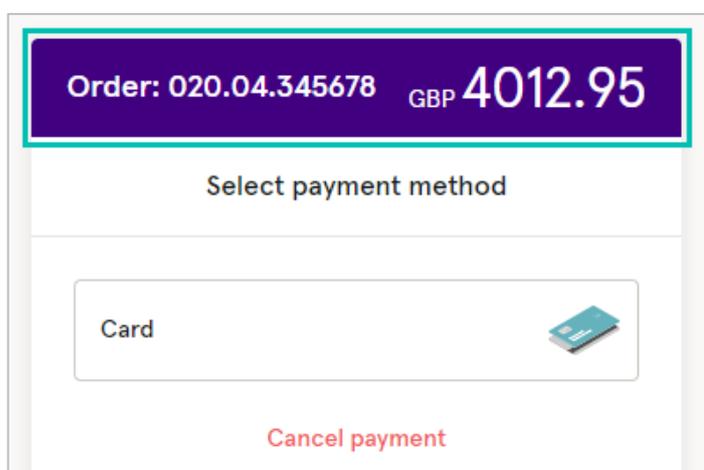
You can remove it if you decide not to keep it and want to choose a different file.

9. To use the chosen logo file, select **Save changes**.
A message is displayed to confirm that the page has been updated.
10. Select **Back** to return to the Editor menu where you can choose more customisation options or exit the Hosted Payment Page editor.
11. 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](#).

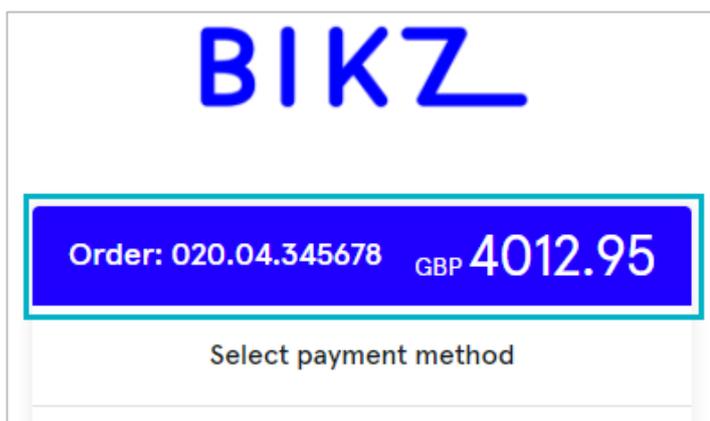


How to change the content header

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:

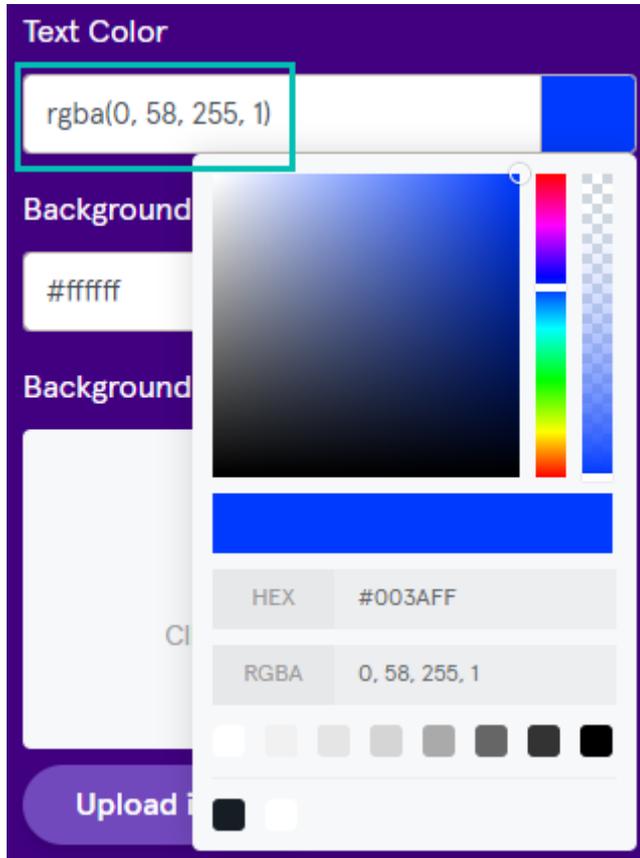


Important: Be sure to consider web standards for legibility and accessibility.

To change the colour of the text:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.
4. Create a new hosted payment page or select the page that you want to change.

5. From the Editor menu, select **Content Header**.
6. If you know the colour values, you can type them in:



7. 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.



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.

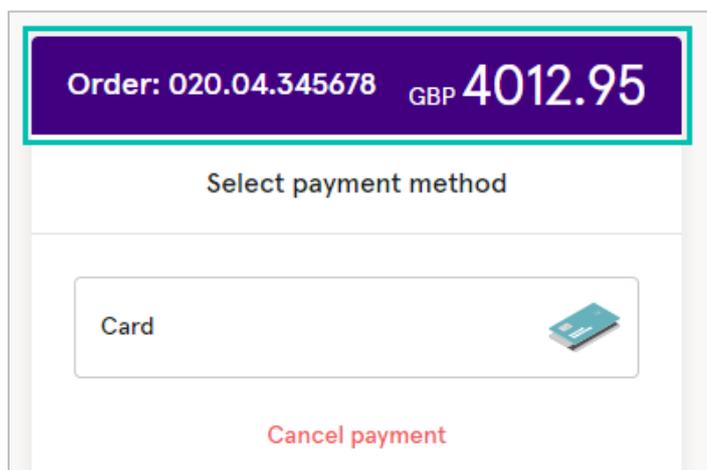
The preview pane shows you how the changes will look if you save them. If you change something but decide not to keep it, you can always use the **Back** button to exit the editor and discard changes without saving.

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 hide the order number

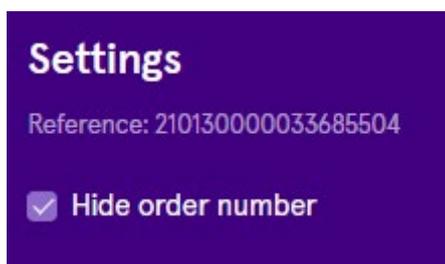
By default, the order number is displayed in the payment content header.



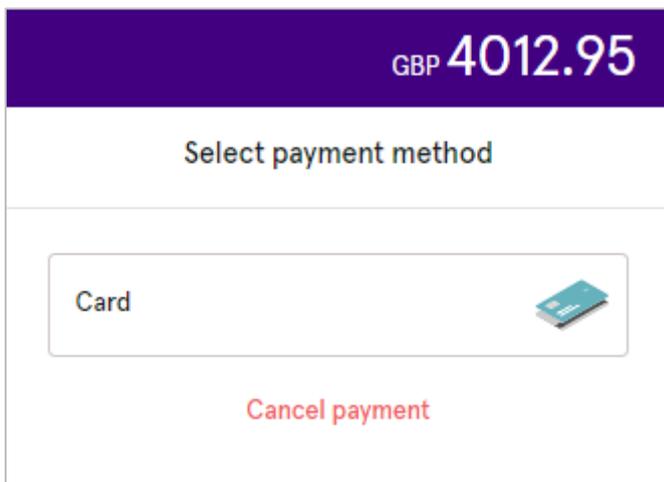
If you prefer not to display the order number, you can hide it.

To hide the order number:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.
4. Create a new hosted payment page or select the page that you want to change.
5. From the Editor menu, select **Settings**.
6. Select **Hide order number**.



The order number is hidden and the preview pane shows how your page will look.

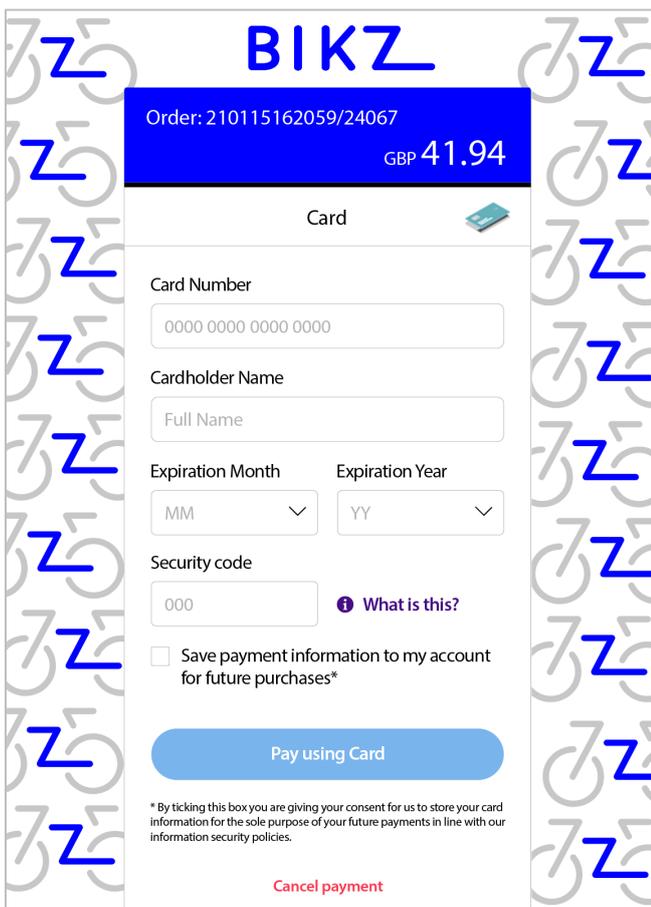


7. Select **Save changes**.



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. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.
4. Create a new hosted payment page or select the page that you want to change.
5. From the Editor menu, select **Page Background**.
6. If you know the colour values, you can type them in.
7. 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.

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

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

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

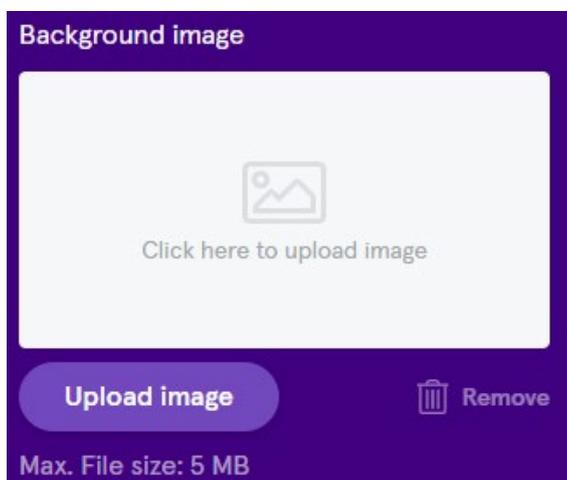
When you have finished customising your page and it's ready to publish, you need to activate it. For information, see [How to activate a page](#).

To add a background image:

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

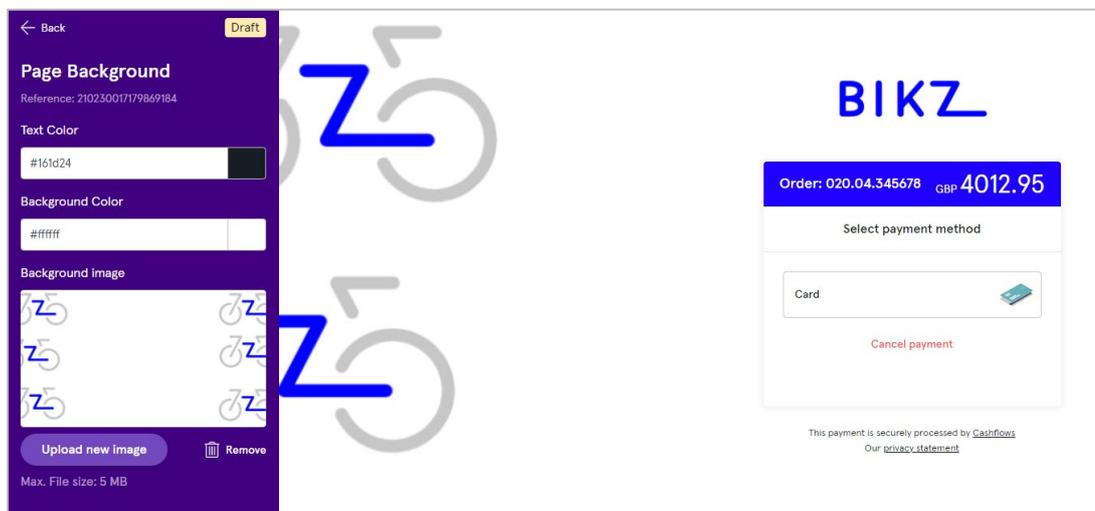
Note: You can set either a background page colour or a background page image but not both.

1. From the Editor 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 Editor 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](#).



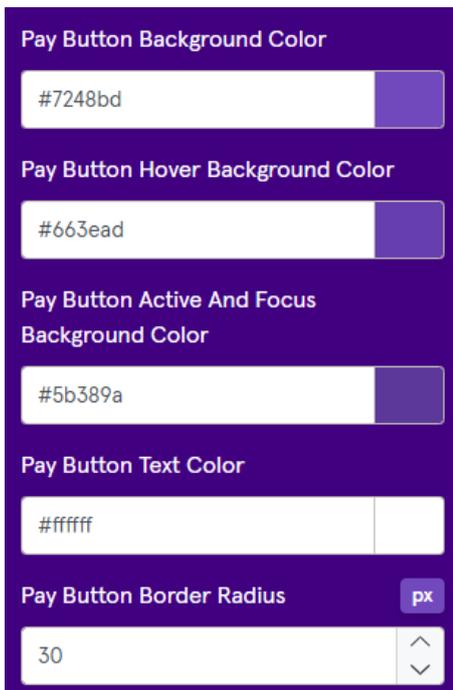
How to change the Pay button

You can change the look and feel of the button that customers click when they come to pay via your Hosted Payment Page. You can also change the name of the Pay button. By default the buttons says *Pay using Card* but for transactions such as a Verify or Zero authorization where no payment takes place, you can rename the button to, for example, *Verify card*. This can reassure customers that they are not paying anything yet.

To change the Pay button:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.
4. Create a new hosted payment page or select the page that you want to change.
5. From the Editor menu, select **Payment Method Details**.

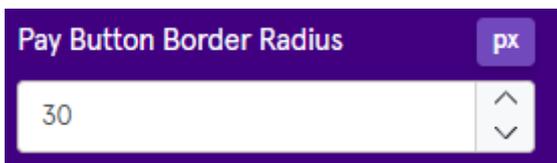
6. Scroll down until you reach the Pay button options:



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](#).

To change the radius of the button border:

1. In the list of Pay button options locate **Pay Button Border Radius**:



2. Increase or reduce the number of pixels.
3. The preview pane shows you how your page will look if you save it.



4. 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](#).



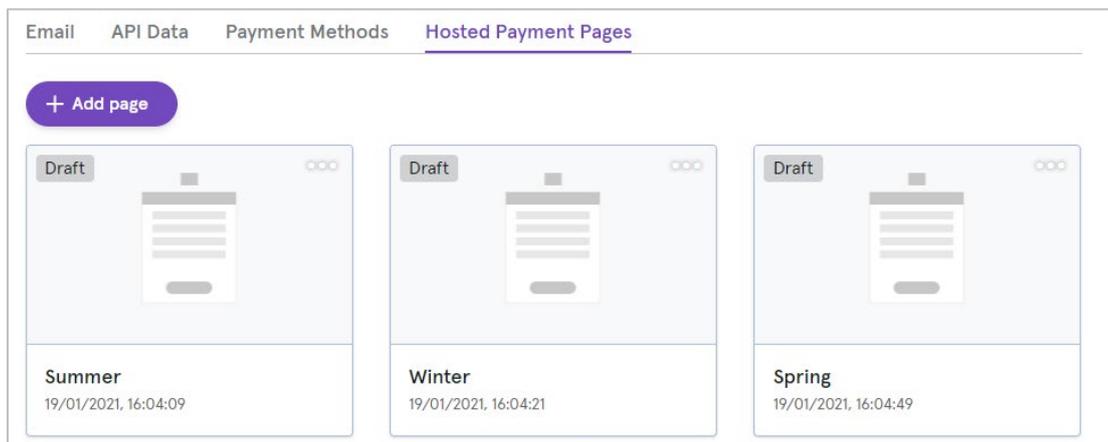
How to activate a page

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

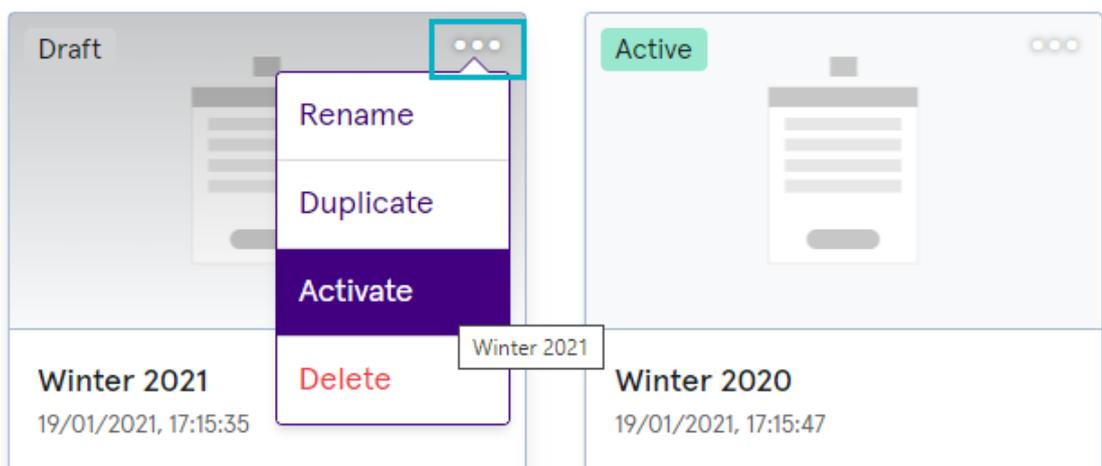
Note: Only one Hosted Payment Page can be active at a time. When you activate a page, a previously active page automatically switches back to Draft.

To activate a page:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.

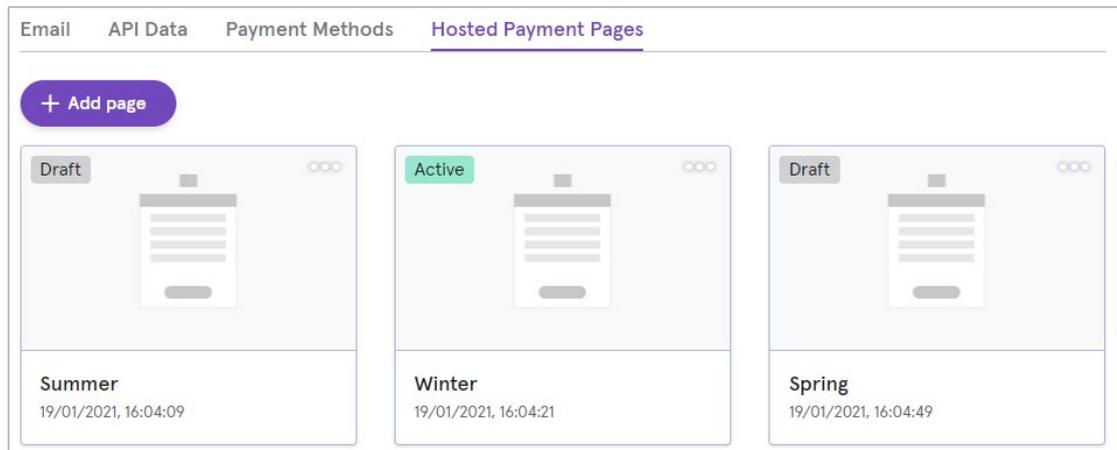


4. Point to the page that you want to activate.
5. Select the ellipsis (...) to display the **Activate** option.



6. 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.

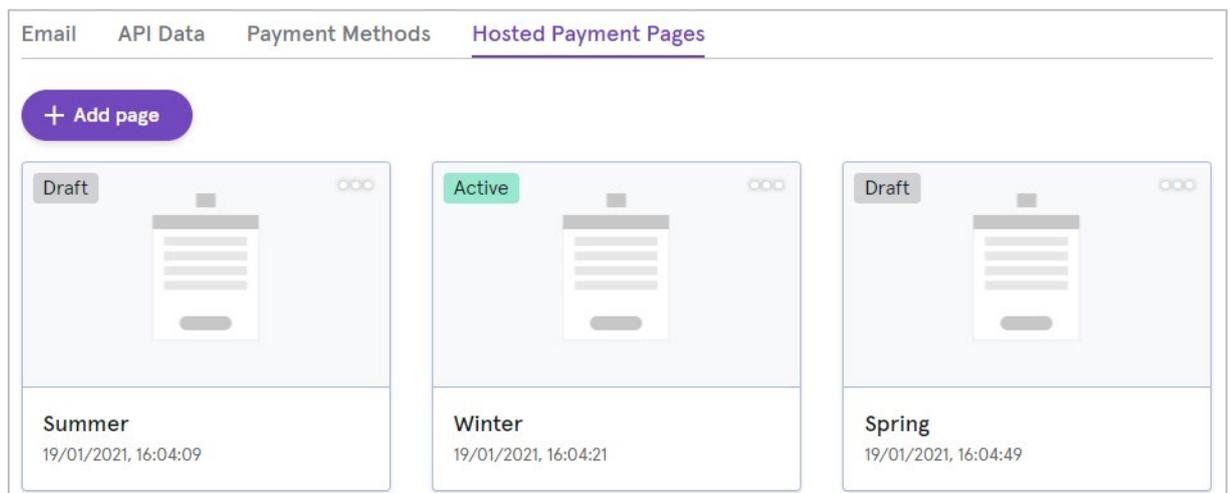


How to deactivate a page

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

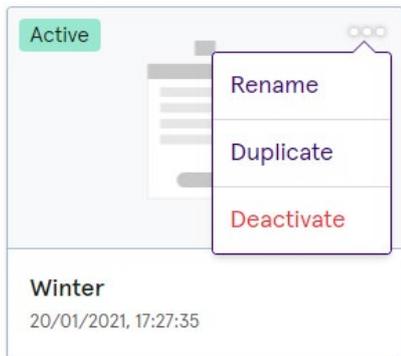
To deactivate a page:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.



4. Point to the page that you want to deactivate.

5. Select the ellipsis (...) to display the **Deactivate** option.



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



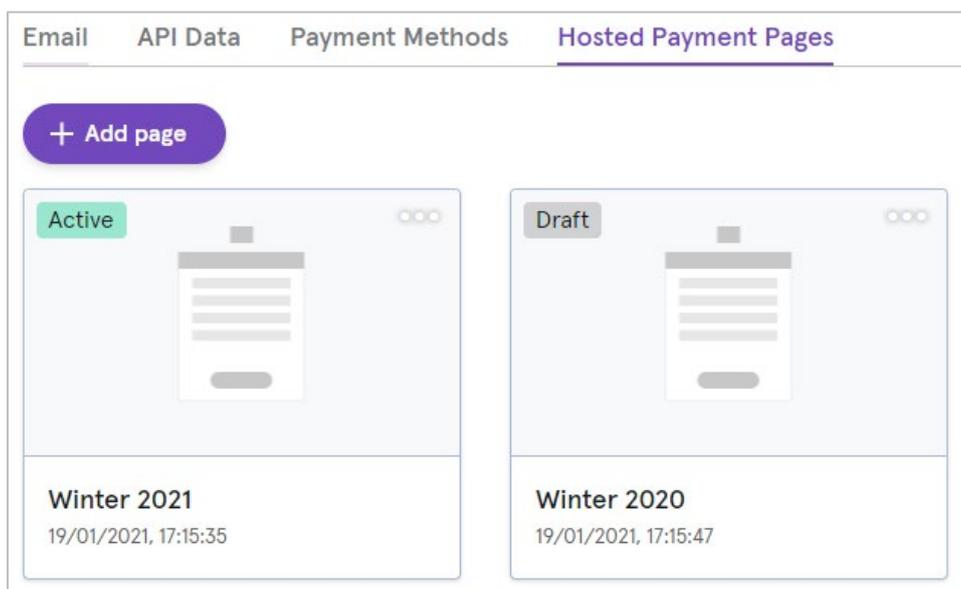
How to delete a page

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](#).

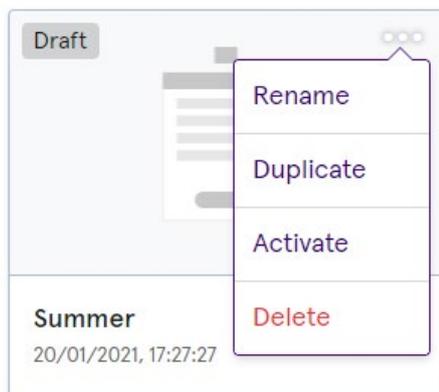
To delete a page:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.



4. Point to the page that you want to delete.

5. Select the ellipsis (...) to display the **Delete** option.



6. Select **Delete**. A message is displayed to ask if you're sure that you want to delete the selected page.
7. Select **Delete**. The selected page is deleted.

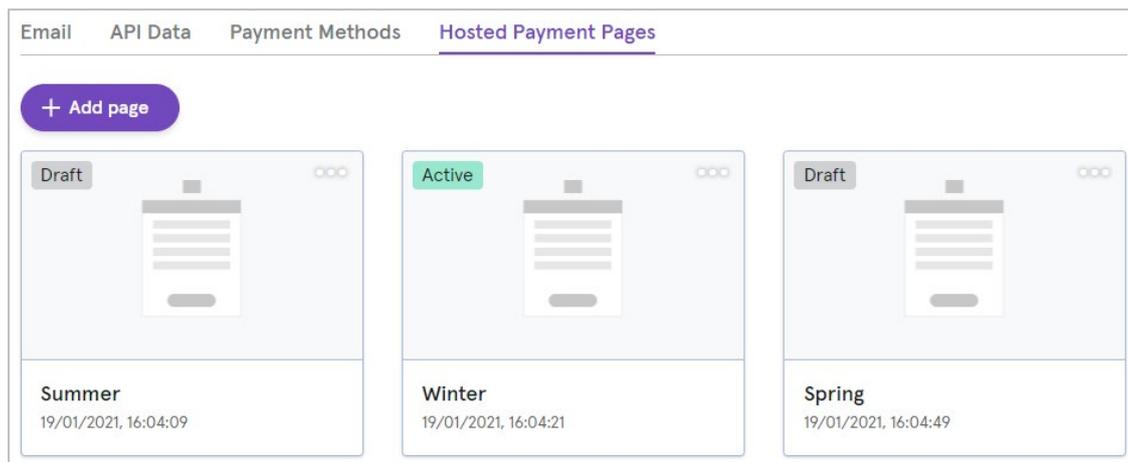


How to rename a page

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

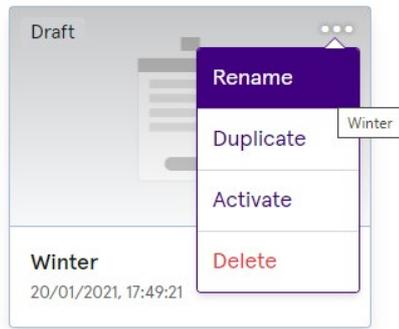
To rename a page:

1. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.



4. Select the page that you want to rename.
5. Select the ellipsis (...) to display the **Rename** option.

6. Select **Rename**.



7. Type the new name or title.

A screenshot of the "Edit Hosted payment page" dialog box. The title bar says "Edit Hosted payment page" with a close button (X). The main content area is titled "Hosted payment page Information". Under "Title *", there is a text input field containing "Winter 2021" with a green checkmark to its right. At the bottom right, there are two buttons: "Cancel" and "Update".

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

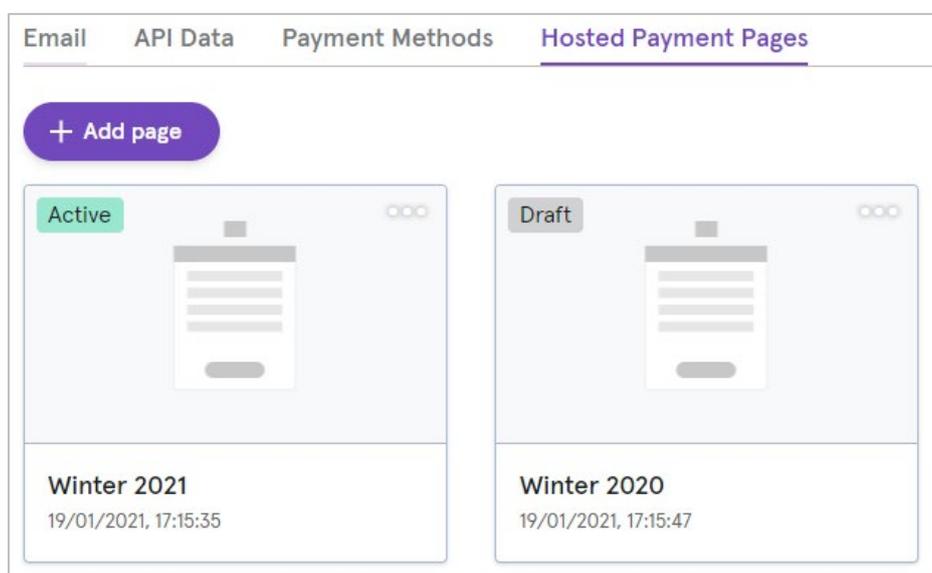


How to duplicate a page

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. Sign into [Cashflows Go](#). You can find step-by-step instructions in the Cashflows Help Centre.
2. From the Cashflows Go menu, select **Configuration**.
3. Select **Hosted Payments Pages**.



4. Point to the page that you want to duplicate.
5. Select the ellipsis (...) to display the **Duplicate** option. A duplicate page is created without a name.
6. 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.

If you are testing card payments, you need to use a valid card number. We provide some test cards that you can use. Visit the Cashflows Help Centre and search for *test* or *test card*.

For information about testing your integration and preparing to go live, refer to [Getting started with the Cashflows Gateway API](#) (PDF) in our Cashflows Help Centre.

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