



Cashflows Go

A guide for partners

Version 1.0 – August 2022

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About this guide

Welcome to this Cashflows Go guide for partners. This guide is for you if you are a partner of Cashflows. This guide describes what Cashflows Go is, the benefits of using it and the features that are available to you when you sign in with partner access permissions.

For an overview of Cashflows Go for merchants, refer to the [Cashflows Go Guide](#) which is available from the Cashflows Help Centre.

For more information

The Cashflows Help Centre

Our [Cashflows Help Centre](#) has all of our published guides plus answers to questions about Cashflows Go. If you can't find the answer to your question, you can request a new article via your relationship manager or contact the following support teams.

Implementation support

For implementation support before your integration goes live:
Email: implementations@cashflows.com

Technical support

If your account is live with us and you need technical help:
Email: techsupport@cashflows.com



Introduction

Cashflows Go is our secure online portal. When you sign in as a partner you can:

- View in one place transactions for all of your customers. This includes all of the businesses and outlets (merchants) that you work with. For information, see [To work in partner context](#)
- View transactions for a specified customer (business or outlet). For information, see [How to choose a partner, business or merchant context](#)
- View the business details of your customers that are stored in Cashflows Go, for example business name, ID, and contact details. For information, see [How to view business and contact details of a merchant](#)
- View your commission and pricing plans. For information, see:
 - [How to view your partner commission plans](#)
 - [How to view a breakdown of your pricing plans](#)
- Manage users. For example you can add more users and control access permissions. For information, see [Managing users](#)

Benefits of using Cashflows Go

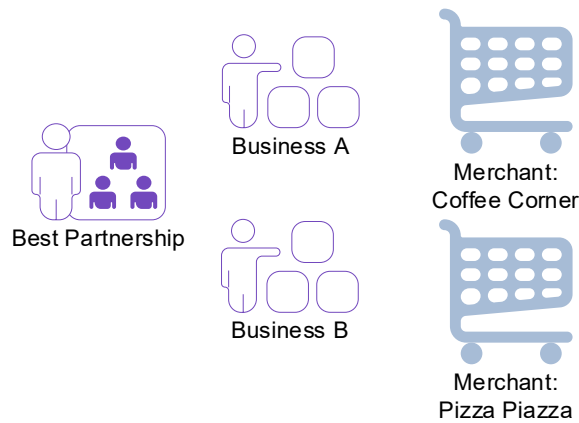
- See all of your customer transactions in one place
- Specify a business or outlet (merchant) and see what they see
- You don't need to sign in as a different business or outlet (merchant) user and you don't need to sign into a different system

How Cashflows Go looks

In Cashflows Go there's a hierarchy of:

- Partner
Your organisation
- Business
Your customers. Each merchant is set up with a business ID and can have multiple merchant IDs to one business ID
- Merchant
Your customers. The individual merchant IDs under the business ID.
Your customers access Cashflows Go via their Business ID and then select the merchant ID of the customer that they want to look into.

Each business and outlet (merchant) can have its own Cashflows Go account.



When you sign into Cashflows Go as a partner, you can choose to work in the context of partner and see transactions for all of your customers and business information for your organisation. You can also choose to view transactions and business information for a selected customer or an individual outlet. This enables you to see what your customers see and is useful if any of them need support. For more information, see [How to choose a partner, business or merchant context](#).

Here’s an example that shows what you see when you sign in to Cashflows Go in partner context, without selecting a business or merchant. The first page displayed is the Transactions page.

Note: The columns shown in the examples throughout this guide depend on whether the display has been customised. If a page has a Columns button, you can use it to choose which columns to show or hide. This enables you to focus on the detail that you need most. For information, see [How to customise the display](#).

The screenshot shows the 'Transactions' page in the Cashflows Go interface. The left-hand navigation menu is visible, with the user's name 'Business636_Postman_1' at the top. The main content area displays a table of transactions with the following data:

Date	Transaction Reference	Customer Name	Order Reference	Amount	Status
08/11/2021, 10:26:32	211121021667909952		2021Nov08_7	15.00 GBP	Paid
08/11/2021, 10:23:38	211121021634224448		2021Nov08_6	25.00 EUR	Pending
08/11/2021, 08:49:40	211121021500002628		2021Nov08_5	35.00 GBP	Paid
08/11/2021, 08:22:18	211121004303356228		2021Nov08_4	15.00 GBP	Paid

At the bottom right of the table, it indicates '1 - 4 of 4' and 'Rows per page: 25'.

Tip: Your organisation’s name is displayed at the top of the menu. Your initials are displayed at the bottom.

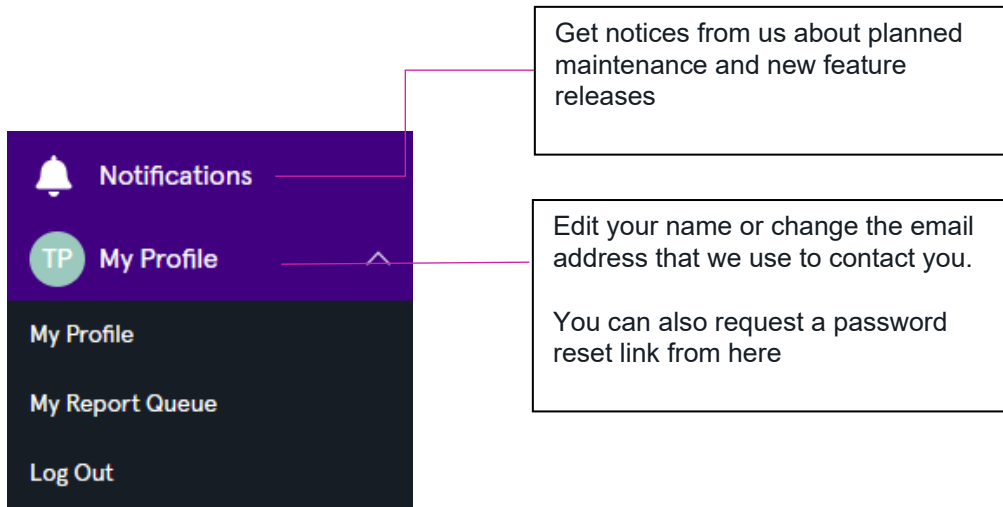
Here’s an example that shows what you see when you sign in to Cashflows Go as a partner and then select a business and a merchant. The first page displayed is the Dashboard page for the selected merchant.

The screenshot shows the 'Dashboard' page in the Cashflows Go interface. The left-hand navigation menu is visible, with the user's name 'Schilling Waßer 800 Schilling' at the top. The main content area displays the following information:

- Current Account Balance Overview:** Four boxes showing 'Merchant Account Statement', 'Security Statement', 'Reserve Statement', and 'Remittance Statement', all with a value of 'GBP 0.00'.
- Transactions Overview:** A section with a date range selector (currently set to 'Day') and a 'Compare date' checkbox. Below this is a calendar view showing dates from 5 Jun 2022 to 29 Jun 2022.
- Summary Metrics:** A row of six summary cards:
 - Transaction Count: 0
 - Total Sales Count: 0
 - Sales Revenue: GBP 0.00
 - Average Transaction Value: GBP 0.00
 - Decline Count: 0
 - Decline Amount: GBP 0.00

Tip: The name of the selected business and merchant are displayed at the top of the Cashflows Go menu.

The available menu options on the left, depend on the context that you choose.



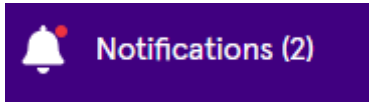
The menu that you see when you sign in to Cashflows Go as a partner is different to the menu that merchants see. For an overview of Cashflows Go for merchants, refer to the [Cashflows Go Guide](#) which is available from the Cashflows Help Centre.

The default menu that you see you when you sign in as a partner, has options that:

- Take you straight to the Notifications centre
This is where we communicate about planned maintenance and announce new features and releases. For information, see [Notifications](#).
- Display your profile so that you can view contact details if you need to
- Enable you to securely sign out from Cashflows Go
For information, see [How to sign out from Cashflows Go](#)

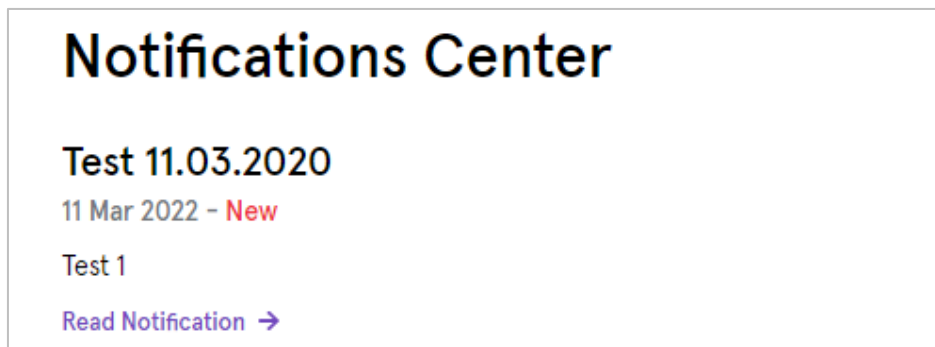
Notifications

Unread notifications, have a red dot displayed next to the notifications icon together with the number of unread notifications in brackets.



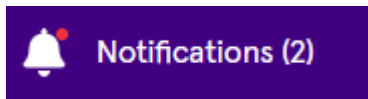
To read the latest notifications:

1. From the Cashflows Go menu, select **Notifications**. The Notifications Center page displays a list of message summaries. New notifications have a **New** label in red so that they stand out from the list.

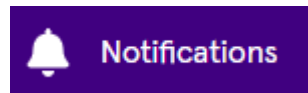


2. To find out more about a notification, select **Read Notification**.

Unread notifications available



No unread notifications



Recent and favourite merchants

You can easily return to a merchant that you were recently working on. Select or clear the star next to the business or merchant name to mark the ones that you work with most often as your favourites.

All Recent Favourites		Search	
Businesses		Merchants	
Continue without Business		Continue without Merchant	
Business636_Postman_1	☆ >	Schilling	☆
Business636_Postman_2	☆ >	Schilling Too	☆
MarkTest	☆ >		
Schilling Waßer äöü	★ >		
Testing R 10.3	★ >		
1 - 5 of 5		1 - 2 of 2	
		Cancel	Apply

Your favourite merchants are then listed on a separate page:

All Recent Favourites		Search	
Schilling Waßer äöü 157	Business	★	
Testing R 10.3 10000001	Business	★	



Getting started

This section explains how to start using Cashflows Go as a partner.

What you need

To use Cashflows Go as a partner you need:

- An internet connection
- A browser
- A Cashflows Go account with *Partner* access permissions.
When you become a partner with us, we send you a welcome email from noreply@Cashflows.com. The email tells you that we have created an account for your organisation and includes a link for setting the password for the first user. For information, see [How to set your Cashflows Go password](#).

Tips:

- The link in the email expires after 24 hours. Therefore, we advise you to set your password as soon as you receive your welcome email.
- If you have not received this email, check your Junk folder or contact your account manager.
- You can always request a new password email if you select **Forgotten password?** on the Login page.

What you need to do

To start using Cashflows Go as a partner:

1. Sign in to Cashflows Go with your partner account details. For information, see [How to sign in to Cashflows Go](#).
2. Set your password. For information, see [How to set your Cashflows Go password](#).
3. Add a second partner user. For information, see [How to add a user](#).

How to sign in to Cashflows Go

1. Select [Cashflows Go](#).
2. Enter your email address.
3. Enter your password.

Note: Passwords are case sensitive.

4. Select **Sign in**.

Warning: If you forget your password and try unsuccessfully to sign in too many times, your account becomes locked. **You cannot unlock your own account.** You either need to ask another partner user to unlock your account or for you or use the Forgotten Password link on the Login page to request a password reset.

How to set your Cashflows Go password

If you are the first user, you can sign in with the account details that we send in the welcome email. For security, the first thing you need to do is set your own password.

Note: You can try to sign in to Cashflows Go up to six times. If the sixth attempt is unsuccessful, your account becomes locked for at least 30 minutes or until we can confirm your identity.

We set this password policy at Cashflows. You cannot change this.

To set your own Cashflows Go password:

1. Display the [Cashflows Go sign in page](#).
2. Select **Forgotten password?**
3. Enter your email address.
4. Select **Email link**. We send you an email that contains a link that you can use to set a new password.
5. Select the link. You see the Change password page.
6. On the Change password page, enter a new password.
7. Retype your new password into the Confirm New Password field.
8. Select **Submit**. When you have successfully entered your new password, you see a confirmation page to tell you that your new password is now active. We also send you a confirmation email.

How to change your Cashflows Go password or request a reset

You can change your own password at any time. If you have forgotten your password, you can request a reset. We send you a link with instructions to follow so that you can set a new password.

Passwords are case sensitive. Your new password must:

- Be at least ten characters long.
- Contain both letters and numbers.
- Contain at least one non-alphanumeric character (such as a symbol).

Tip: A password may not be accepted if it has been used already in the previous 10 passwords.

To change your Cashflows Go password or request a reset

1. Display the [Cashflows Go sign in page](#).
2. Select **Forgotten password?**
3. Enter your email address.
4. Select **Email link**. We send you an email that contains a link that you can use to set a new password.
5. Select the link. You see the Change password page.

6. On the Change password page, enter a new password.
7. Retype your new password into the Confirm New Password field.
8. Select **Submit**. When you have successfully entered your new password, you see a confirmation page to tell you that your new password is now active. We also send you a confirmation email.

Note: These emails sometimes go to the Junk or Spam folder and the link in the email expires after 24 hours. If you have not used the link within 24 hours, you can trigger a new email in the same way.

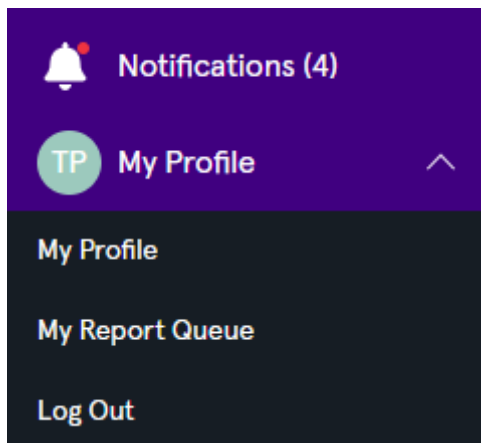
You can now add more users. It's good practice to add a second partner user as soon as possible in case the first partner account ever needs to be unlocked. For information, see [Managing users](#).

How to sign out from Cashflows Go

It's good security practice to sign out from Cashflows Go instead of only closing the browser.

To sign out from Cashflows Go

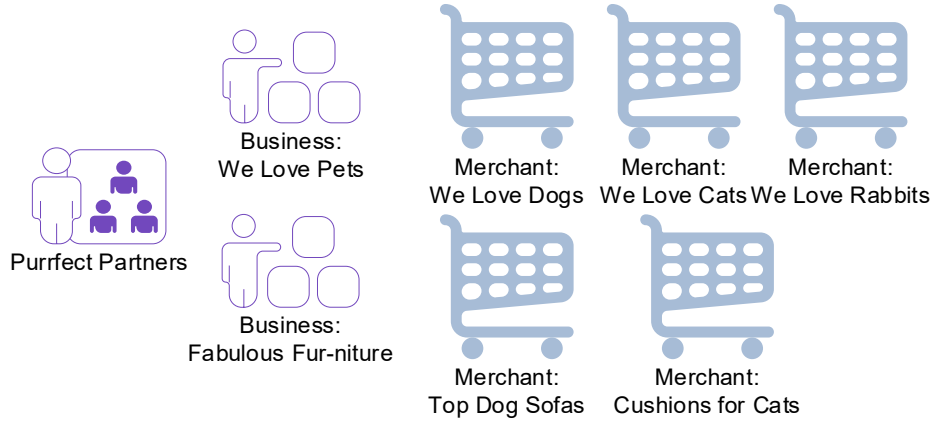
1. From the Cashflows Go menu, select **My Profile**.



2. Select **Log Out**. The **Login** page is displayed.

How to choose a business or merchant context

When you sign into Cashflows Go as a partner, you have access to all of your merchant accounts with Cashflows in one place.

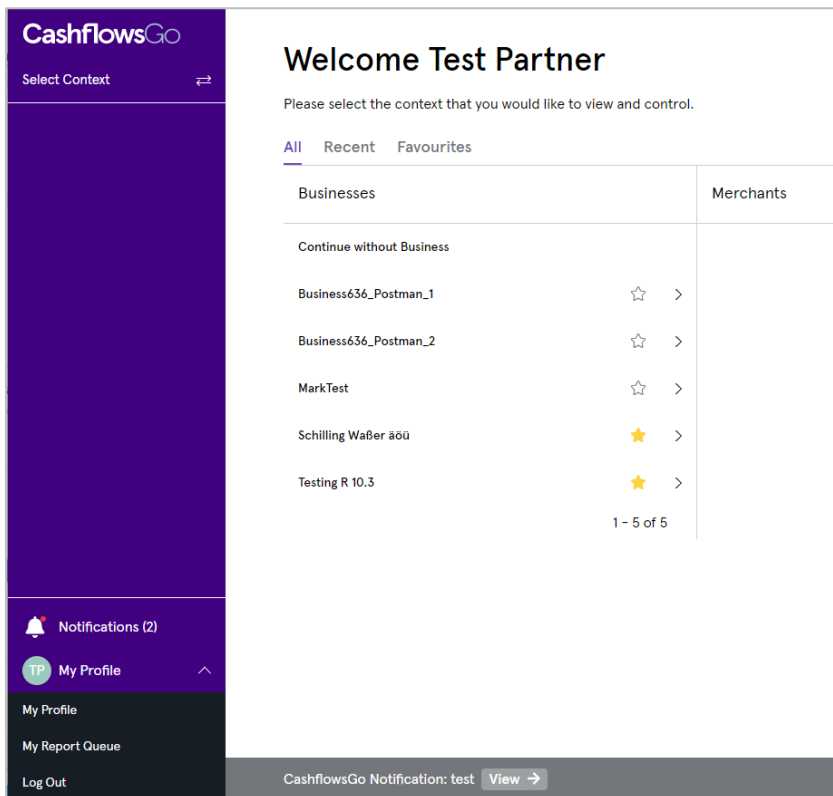


When you sign into Cashflows Go as a partner, you can choose to remain working at partner level or in the context of a business or merchant and see transactions and other business information that they see. This is useful if any of your customers need support.

Note: As a partner, your access to merchant information is read-only. You cannot change any merchant details.

To select a context

1. Sign into [Cashflows Go](#) as a partner. The Welcome page is displayed.



2. Select a level (context) at which you would like to work.

You can choose any of the following context options.

To work in partner context

1. Select **Continue without Business**:

Businesses	Merchants
Continue without Business	

2. Select **Apply**.

To work in business context

1. Select a Business.
2. Select **Continue without Merchant**:

Businesses	Merchants
Continue without Business	Continue without Merchant
Business636_Postman_1 ☆ >	Business636_Postman_1 ☆

3. Select **Apply**.

To work in merchant context

1. Select a Business.
2. Select a **Merchant**:

Businesses	Merchants
Continue without Business	Continue without Merchant
Business636_Postman_1 ☆ >	Business636_Postman_2 ☆
Business636_Postman_2 ☆ >	

3. Select **Apply**. If you selected a business, you see the Transactions page:

Date	Customer Name	Amount	Business Name	Merchant Name
08/11/2021, 10:26:32		15.00 GBP	Business636_Postman_1	Business636_Postman_1
08/11/2021, 10:23:38		25.00 EUR	Business636_Postman_1	Business636_Postman_1
08/11/2021, 08:49:40		35.00 GBP	Business636_Postman_1	Business636_Postman_1
08/11/2021, 08:22:18		15.00 GBP	Business636_Postman_1	Business636_Postman_1

If you selected a merchant, you see the merchant Dashboard:

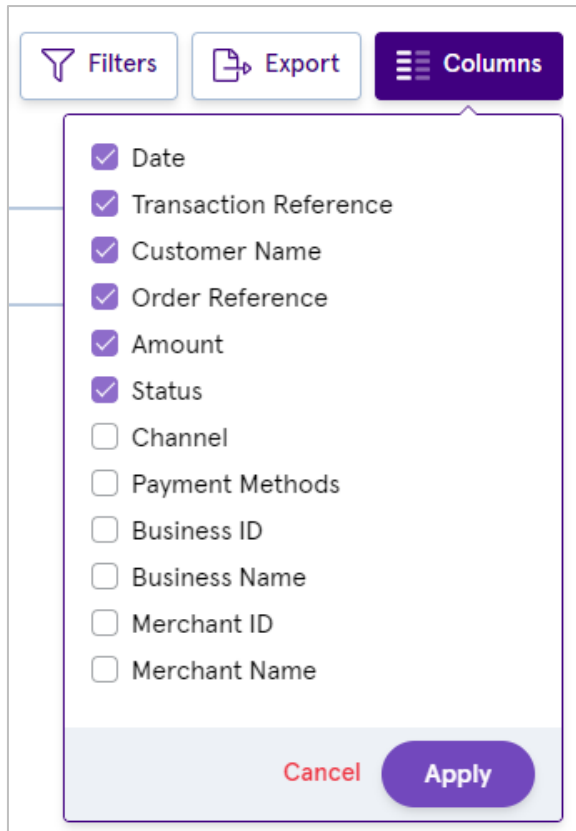
For information about merchant dashboards, refer to the [Cashflows Go Guide](#) in our Cashflows Help Centre.

How to customise the display

The columns shown in the examples throughout this guide depend on whether the display has been customised. If a page has a **Columns** button, you can use it to choose which columns to show or hide. This enables you to focus on the detail that you need most.

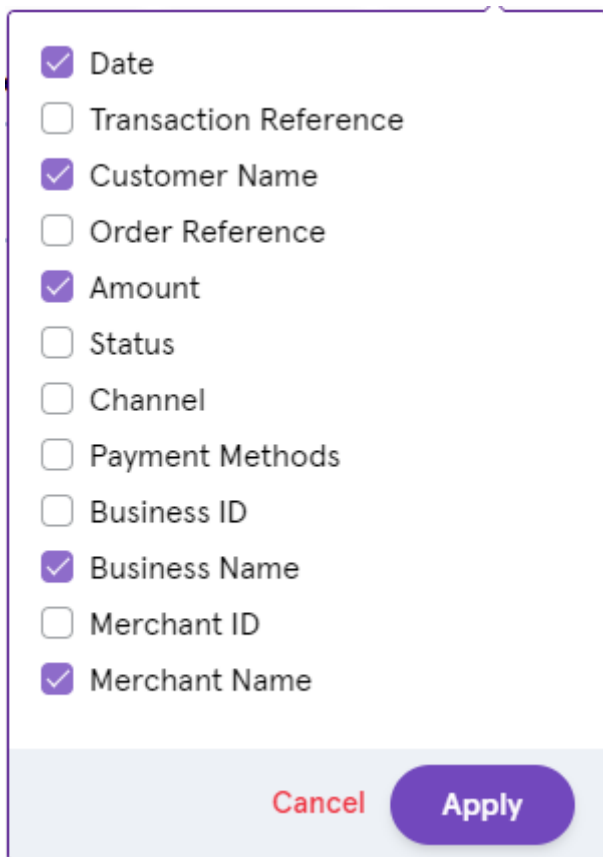
How to show or hide columns

1. Select the **Columns** button.



2. Select each column that you want to display.

3. Clear any columns that you don't want to display.



- Date
- Transaction Reference
- Customer Name
- Order Reference
- Amount
- Status
- Channel
- Payment Methods
- Business ID
- Business Name
- Merchant ID
- Merchant Name

Cancel Apply

4. Select **Apply**. The columns are immediately updated on the page that you had displayed.



Managing users

Each Cashflows Go user has a user role. Your user role controls the accounts that you have access to, the options that you can use and the tasks that you can carry out. We set up the initial user with the role of *Partner*. As the first Partner user, you can create additional partner users and assign them a permissions role.

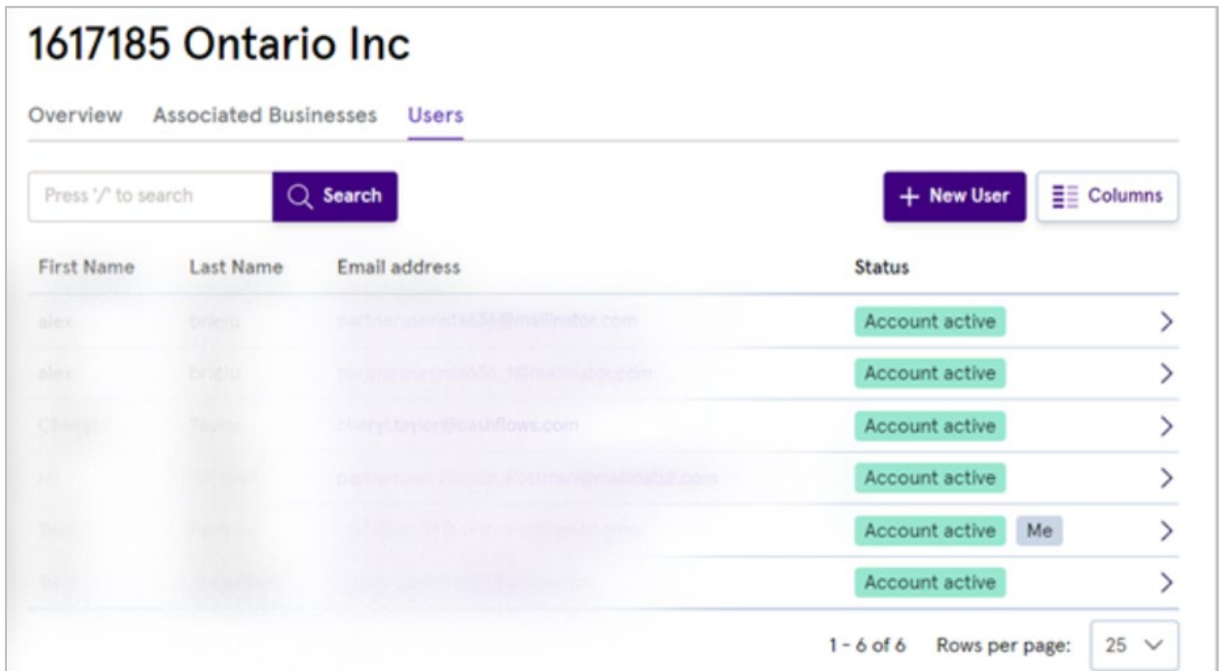
Important: It's good practice to add a second user with *Partner* permissions as soon as possible. This means that there is always a second person with the highest level access permissions. This is essential, for example, if a partner user account ever becomes locked.

As a partner user, you see a Partner option on the Cashflows Go menu. If you select this option, you can see a list of current users, if there are any, and an option to add more users. For information see [How to add a user](#).

How to add a user

To add a user

1. Sign into [Cashflows Go](#) as a partner and do not choose a business or merchant context.
2. From the Cashflows Go menu, select **Partner**.
3. Select the **Users** page.



4. Select **+New User**.

The screenshot shows the 'Add Partner User' form. At the top left, there is a back arrow and the text 'Back to Partner Details'. The main heading is 'Add Partner User'. Below this is the section 'Personal Information'. There are three input fields: 'First Name *', 'Last Name *', and 'Email *'. Each field has a placeholder text corresponding to its label. At the bottom of the form, there are two buttons: a purple 'Add User' button with a plus icon and a red 'Cancel' button.

5. Enter the user's first and last names.
6. Enter their email address.


Select **Add User**. The new user is created:

Personal Information

First Name *

Last Name *

Email *

 **Save User** Cancel

Account Information

Account active Lock account

[Send Password Reset Link](#)

[Delete User](#)

7. Select **Save User**. The user details are validated. If there are no errors, the user is created and their account is activated. An email is automatically sent to the specified email address with a message to invite the newly created user to follow a link and set their password.

How to change user details

As a partner user you can change some of the details about other partner level users for your organisation. You can change a user's:

- First name
- Last Name
- Email address
- User role(s)

To change a user's details

1. Sign into Cashflows Go as a partner and do not choose a business or merchant context.
2. From the Cashflows Go menu, select **Partner**.
3. Select the **Users** page.

First Name	Last Name	Email address	Status
Alex	Briou	partnerusernted36@mailinator.com	Account active
Alex	Bridis	partnerusernted36_10@mailinator.com	Account active
Cheryl	Taylor	cheryl.taylor@cashflows.com	Account active
Pat	...	partnerusernted36_10@mailinator.com	Account active
Paul	...	partnerusernted36_10@mailinator.com	Account active Me
...	Account active

4. Select the user whose details you want to change.
5. Change the details as required.
6. Select **Save User**.

How to delete a user

It's good user management to delete users who no longer need access to your systems, for example if they leave your business or change to a role that no longer requires access to Cashflows Go.

To delete a partner user:

1. Sign into Cashflows Go as a partner and do not choose a business or merchant context.
2. From the Cashflows Go menu, select **Partner**.

3. Select the **Users** page.

1617185 Ontario Inc

Overview Associated Businesses **Users**

Press '/' to search

First Name	Last Name	Email address	Status
Alex	Brink	partneruser1617185@mailinator.com	Account active
Alex	Brink	partneruser1617185@mailinator.com	Account active
Cheryl	Taylor	cheryl.taylor@cashflows.com	Account active
Alex	Brink	partneruser1617185@mailinator.com	Account active
Test	Admin	test@cashflows.com	Account active Me
Test	Admin	test@cashflows.com	Account active

1 - 6 of 6 Rows per page: 25

4. Select the user that you want to delete.
5. Select **Delete User**.
6. A confirmation message is displayed. If you don't want to delete the user, select Cancel. If you're sure that you do want to go ahead and delete the selected user, select **Delete**.

The user is deleted.

How to unlock a partner user account

For security reasons, if another user enters incorrect sign-in details too many times, their account becomes locked and they may contact you to unlock their account. As the primary partner user, you can do this for any of the partner level users at your organisation.

To unlock an account

1. Sign into Cashflows Go as a partner and do not choose a business or merchant context.
2. From the Cashflows Go menu, select **Partner**.

3. Select the **Users** page.

1617185 Ontario Inc

Overview Associated Businesses **Users**

Press '/' to search

First Name	Last Name	Email address	Status
Alex	Brink	partneruserndad36@mailinator.com	Account active
Alex	Brink	partneruserndad36_1@mailinator.com	Account active
Cheryl	Taylor	cheryl.taylor@cashflows.com	Account active
Alex	Brink	partneruserndad36_hostman@mailinator.com	Account active
Test	Admin	test@cashflows.com	Account active Me
Test	Admin	test@cashflows.com	Account active

1 - 6 of 6 Rows per page: 25

4. Select the user whose account you want to unlock.
5. Select **Unlock Account**.

How to lock an account

If you ever need to prevent a user from using Cashflows Go, you can lock their account so that they are unable to sign in.

Important: Locking an account is temporary and you can always unlock an account. However, deleting a user's account is permanent and may not be reversed. They need to be added again as a new user. For information, see [How to delete a user](#) and [How to add a partner user](#).

To lock an account

1. Sign into Cashflows Go.
2. Sign into Cashflows Go as a partner and do not choose a business or merchant context.
3. From the Cashflows Go menu, select **Partner**.

- Select the **Users** page.

1617185 Ontario Inc

Overview Associated Businesses **Users**

Press '/' to search

First Name	Last Name	Email address	Status
Alex	Brink	partneruser1617185@mailinator.com	Account active
Alex	Brink	partneruser1617185_1@mailinator.com	Account active
Cheryl	Taylor	cheryl.taylor@cashflows.com	Account active
Alex	Brink	partneruser1617185_hostman@mailinator.com	Account active
Test	Hostman	test@cashflows.com	Account active Me
Test	Hostman	test@cashflows.com	Account active

1 - 6 of 6 Rows per page: 25

- Select the user whose account you want to lock.

[← Back to Partner Details](#)

Partner User Details

Personal Information

First Name *

Last Name *

Email *

Account Information

Account active

[Send Password Reset Link](#)

[Delete User](#)

[Cancel](#)

- Select **Lock account**. The user is immediately unable to sign into their account. If a user is already signed in when you lock their account, they are automatically be signed out and cannot sign back in.



Viewing customer business information

As a partner user, you have read-only access to some business details that relate to your customers. These details include business name, ID, address and nominated signatories. This is the information that was provided to us when you became a partner with us and is stored in Cashflows Go. You can also view a list of outlets (merchants) that are associated with each of your customers.

Note: If it's ever necessary to change any of these details, you need to contact the Cashflows support team: techsupport@cashflows.com.

Business Overview – Schilling Waßer äöü

Business Details

Business Name	Schilling Waßer äöü
Business ID	157
Address	Mattiellistrasse 2-4
City	Vienna
Country	GB
Postcode	1040
Company Registration Number	
Signatories Name	Gerhardt Schilling
Business URL	http://www.schilling.com

Associated Merchants

Columns

Merchant ID	Merchant Name	
190	Schilling	>
206	Schilling Too	>

1 - 2 of 2 Rows per page: 10 v

As a partner user, you also have read-only access to information about your merchant customers such as name, ID, and support details.

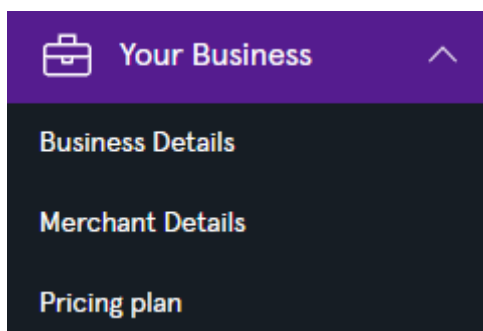
Merchant Details	
Merchant Name	Schilling Too
Merchant ID	206
Customer Services Email	sales@schilling.com
Customer Services Telephone	01235654987
Merchant URL	http://www.schilling.com
Support URL	http://www.schilling.com

How to view business details of your customers

As a partner user, you can view details that we store in Cashflows Go about any of the businesses or merchants that are associated with your partner organisation.

To view your business details

1. Sign into Cashflows Go as a partner.
2. Select your Business.
3. Select **Continue without Merchant**.
4. Select **Apply**.
5. From the Cashflows Go menu, select **Your Business**.



6. Select **Business Details**.

Business Details

Business Name	Schilling Waßer
Business ID	157
Address	
City	
Country	GB
Postcode	1040
Company Registration Number	
Signatories Name	Clara and Pauline
Business URL	http://www.schilling.com

Associated Merchants

Columns

Merchant ID	Merchant Name	
190	Schilling	>
206	Schilling Too	>

1 - 2 of 2 Rows per page: 10

If you select one of your associated merchants from the list, you have ready-only access to their business details. For information, see [How to view business and contact details of a merchant](#).

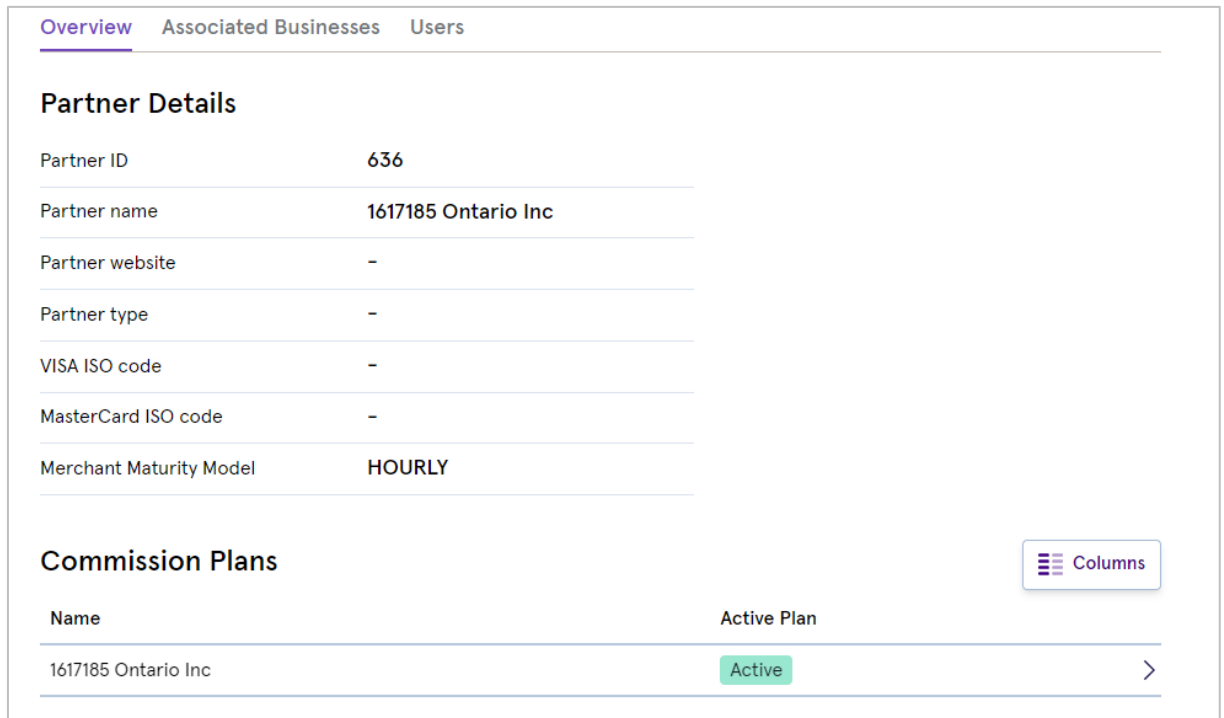
How to view your partner commission plans

With Cashflows Go you can view a single page that shows the following different commission plans that are in place for your partner organisation:

- **Transaction commission**
Commission that your organisation earns per transaction
- **Merchant Service Charge (MSC) commission**
Commission that your organisation receives from us for a specified service
- **Credit transfer commission**
Commission that your organisation receives if one or your merchant customers is using Credit Transfers
- **Dispute commission**
Commission that your organisation receives if one or your merchant customers is using disputes / chargebacks

To view your commissions plans

1. Sign into [Cashflows Go](#) as a partner and do not choose a business or merchant context.
2. Select **Continue without Business**.
3. Select **Apply**.
4. From the Cashflows Go menu, select **Partner**.



The screenshot displays the 'Partner Details' page in the Cashflows Go interface. At the top, there are three tabs: 'Overview' (selected), 'Associated Businesses', and 'Users'. Below the tabs, the 'Partner Details' section lists various attributes:

Partner ID	636
Partner name	1617185 Ontario Inc
Partner website	-
Partner type	-
VISA ISO code	-
MasterCard ISO code	-
Merchant Maturity Model	HOURLY

Below the details is a 'Commission Plans' section. It features a table with two columns: 'Name' and 'Active Plan'. A 'Columns' button is located to the right of the table. The table contains one entry:

Name	Active Plan
1617185 Ontario Inc	Active

A list of merchants for which commission plans have been set up is displayed below the Partner Details.

- Select a merchant to display the full list of commission plans that your organisation has in place for selling the services of the selected merchant.

Transaction Commission

Type	Buy Rate	Split Percentage
Authorisation Request	500.00 GBP	40.00 %
Decline	500.00 GBP	20.00 %
Refund	3,500.00 GBP	20.00 %

MSC Commission

Card Scheme	Buy Rate	Split Percentage
VISA	0.00 GBP + 1.00 %	40.00 %
MasterCard	0.00 GBP + 1.00 %	40.00 %
AMEX	0.00 GBP + 1.00 %	40.00 %

Credit Transfer Commission

Card Scheme	Buy Rate	Split Percentage
VISA	2,000.00 GBP + 0.00 %	40.00 %
MasterCard Domestic Regional	2,000.00 GBP + 0.00 %	40.00 %
MasterCard International	2,000.00 GBP + 0.00 %	40.00 %

Dispute Commission

Type	Buy Rate	Split Percentage
High risk	150,000.00 GBP	40.00 %
Chargeback	150,000.00 GBP	40.00 %
Copy Request	150,000.00 GBP	40.00 %
Dispute / Pre-arb	150,000.00 GBP	40.00 %

How to view all of your customer transactions

Cashflows Go provides a complete view for all of your customer transactions. The Transactions page is a real-time list that updates to display all incoming transactions together with their status such as *Paid* or *Pending*. The status is updated as a payment passes through the payment processing lifecycle.

CashflowsGo
Business636_Postman_1

Transactions

Press '/' to search

1 Jan 2021 - 31 Dec 2021

Date	Transaction Reference	Customer Name	Order Reference	Amount	Status
08/11/2021, 10:26:32	211121021667909952		2021Nov08_7	15.00 GBP	Paid
08/11/2021, 10:23:38	211121021634224448		2021Nov08_6	25.00 EUR	Pending
08/11/2021, 08:49:40	211121021500002628		2021Nov08_5	35.00 GBP	Paid
08/11/2021, 08:22:18	211121004303356228		2021Nov08_4	15.00 GBP	Paid

1 - 4 of 4 Rows per page: 25

To view all of your customer transactions

1. Sign into Cashflows Go as a partner and do not choose a business or merchant context.
2. Select **Continue without Business**.
3. Select **Apply**. The **Transactions** page is displayed.

You can customise the list to suit your information needs and focus on exactly what you need to investigate. For information, see [How to customise the display](#).

The Transactions page has a search feature that you can use to search for one or more transactions that match specified criteria. For information, see [How to search for transactions](#).

How to search for transactions

There are many ways to search for transactions in Cashflows Go. To help you locate a specific payment or a set of payments that match specific criteria, you can apply a filter.

Tip: If you often carry out the same search, you can also save a search filter and re-use it.

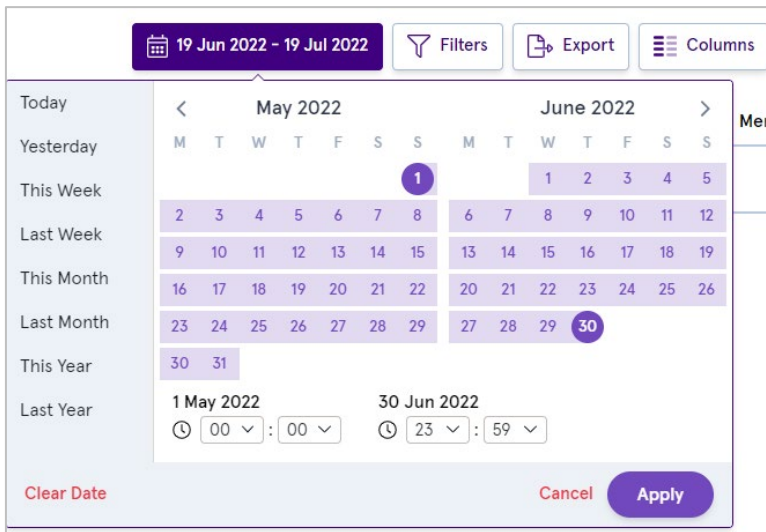
You can search for and focus on one or more payments that:

- Took place on a specific date or between a start and end date.
- Have the same payment status, for example *Paid* or *Declined*.
- Match a specified amount or fall between a minimum and maximum amount.
- Are all in the same currency.
- Were made using the same payment method, for example by *card* or with *PayPal*.
- Were made via the same channel, such as:
 - Online payments via our Cashflows Gateway.
 - In-store payments via a card machine (as part of our cardholder present solution).
 - Via our acquiring platform.

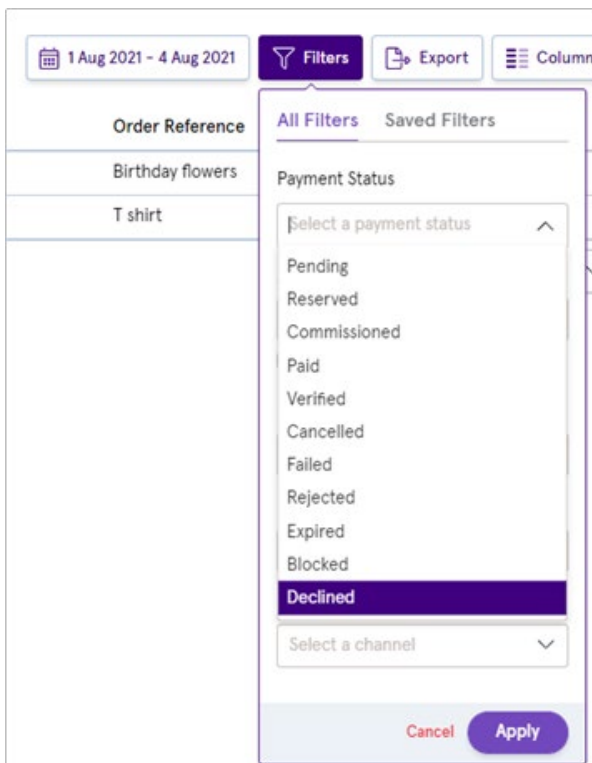
To search for one or more payments in Cashflows Go

1. Sign into Cashflows Go as a partner.
2. Select a context. For information, see How to choose a partner, business or merchant context
3. From the Cashflows Go menu, select **Transactions**.
4. To search for one or more transactions, specify the search criteria to match. Here are some example searches:

Example search for transactions that took place in May and June:



Example search for declined transactions in the last month:



Example quick search for the name Smith:

← Back to Dashboard

Transactions

/ smith Search

Filters: Search term: / smith ×

Date	Transaction Reference	Customer Name
26/04/2021, 12:35:43	210421000167781196	P Smith

- If any payments match the conditions that you have specified, they are displayed on the page. You can choose which columns to display and hide any that you don't need to see. Select **Columns**.
- Select the columns that you want to display and clear the columns that you don't need.
- You can also choose how many payments to display per page, for example or 10 or 50 or 100.

Save Filters

Status

Paid

1 - 1 of 1 Rows per page:

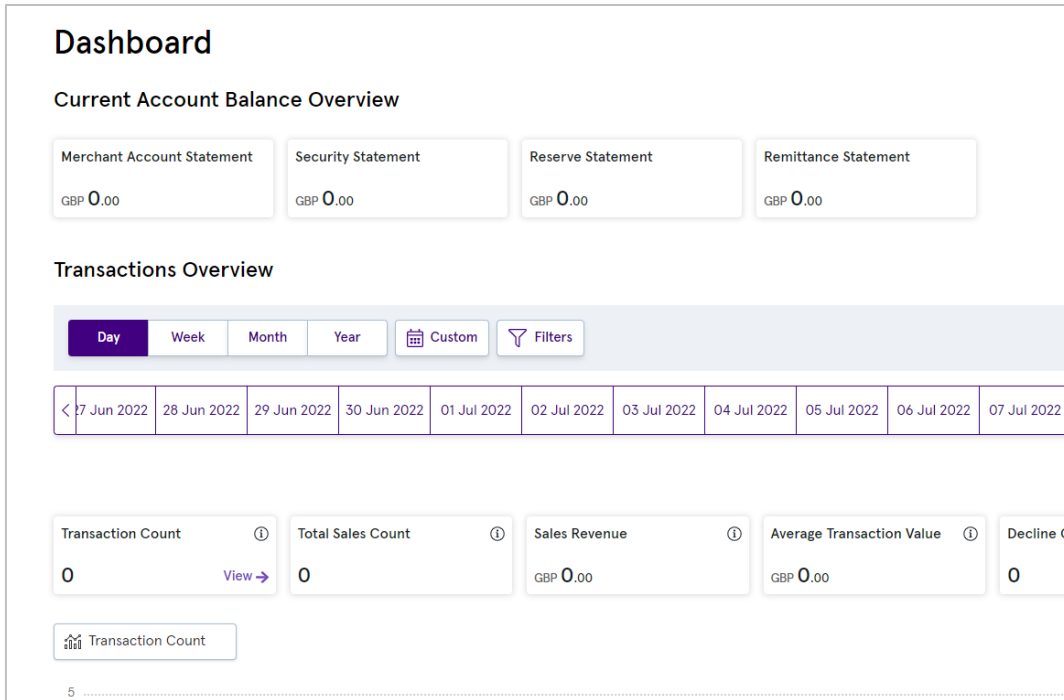
10
25
50
100
25 ^

When you have found the payment(s) that you needed to find, you can select a payment to investigate in more detail.



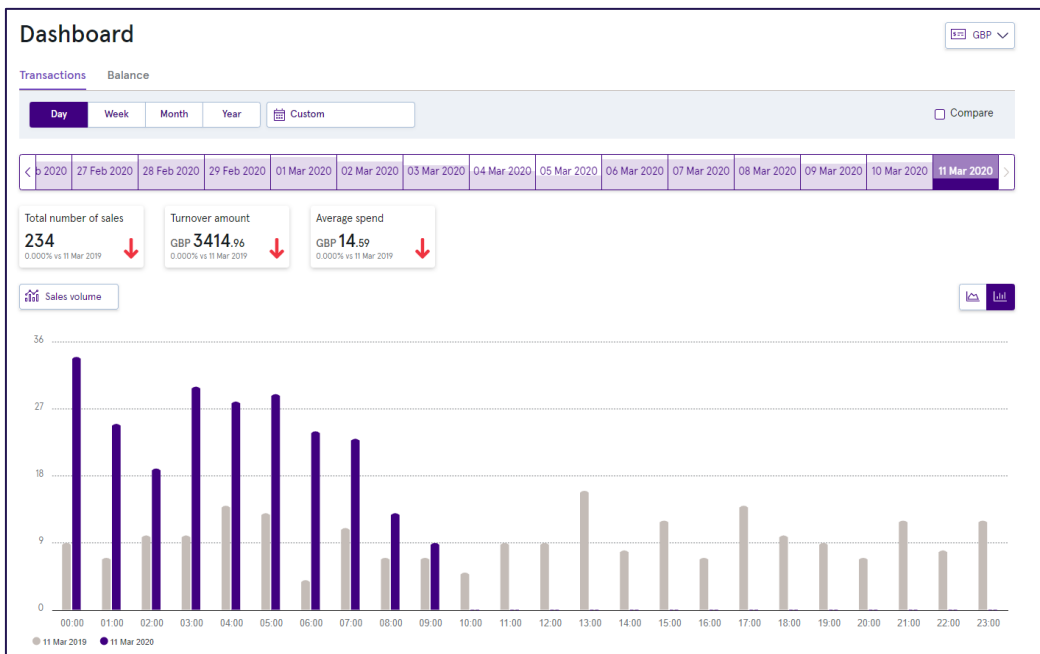
Viewing merchant dashboards

As a partner, you have read-only access to the dashboards of your merchant customers. A merchant dashboard presents payment information in a user-friendly graphical format.



You can search for and view transactions placed via the Cashflows Go Virtual Terminal and/or any other channels such as Card or PayPal.

Here's an example of a merchant dashboard:



For information, see:

- [How to view merchant transactions](#)
- [How to search for transactions.](#)

You can also:

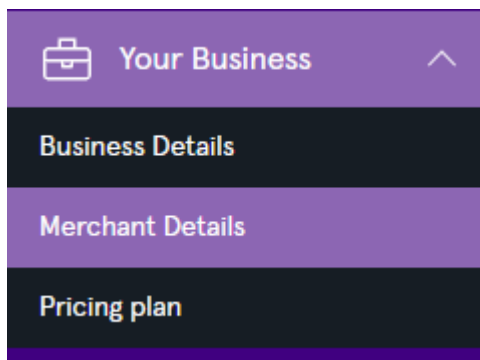
- View the business and contact details of a merchant. For information, see [How to view business and contact details of a merchant](#)
- View a pricing plan for a selected merchant. For information, see The Transactions page has a search feature that you can use to search for one or more transactions that match specified criteria. For information, see [How to search for transactions.](#)

How to view business and contact details of a merchant customer

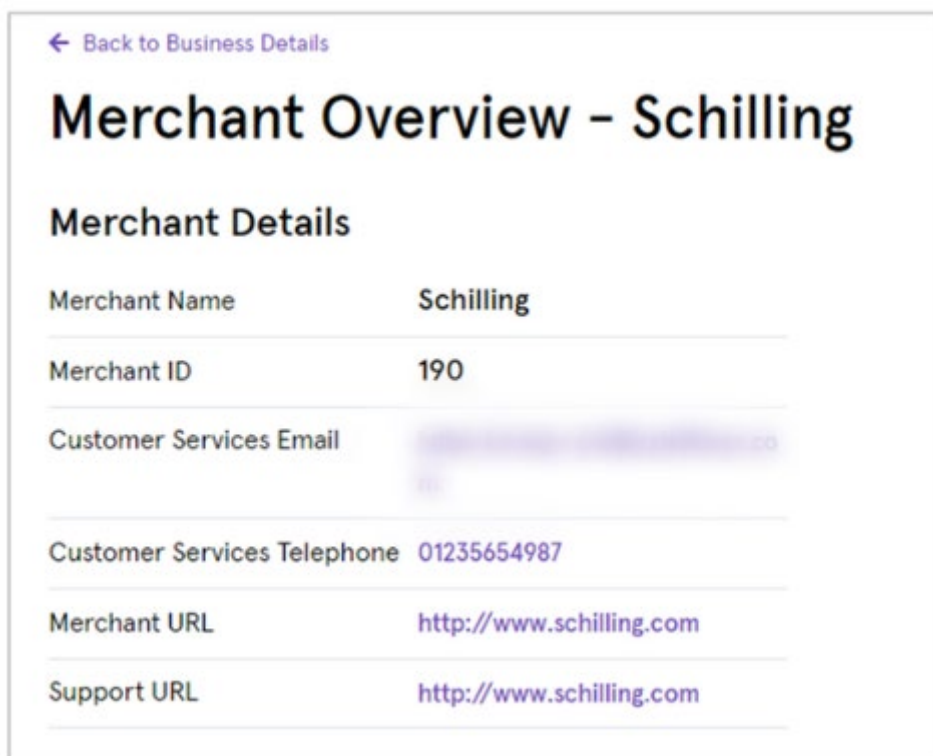
If you need them you can find the business details, such as Merchant ID, and contact details for any of your merchants in one handy place via Cashflows Go.

To view the business and contact details of a merchant

1. Sign into Cashflows Go as a partner.
2. Select a business.
3. Select a merchant.
4. Select **Apply**.
5. From the Cashflows Go menu, select **Your Business**.



6. Select **Merchant Details**. An overview pages is displayed with the business and support details for the selected merchant.



How to view merchant transactions

As a partner, you have read-only access to the payment information of your merchant customers. You can view a merchant dashboard for a real-time graphical snapshot. You can also view transaction information in more detail. You can then search for and view transactions placed with the merchant via the Cashflows Go Virtual Terminal and/or any other channels such as Card or PayPal.

To view merchant transactions

1. Sign into Cashflows Go as a partner.
2. Select a business.
3. Select a merchant.

- Select **Apply**. The dashboard is displayed for the selected merchant.

- From the Cashflows Go menu, select **Transactions**. The Transactions page is displayed.

Date	Customer Name	Amount	Business Name	Merchant Name
08/11/2021, 10:26:32		15.00 GBP	Business636_Postman_1	Business636_Postman_1
08/11/2021, 10:23:38		25.00 EUR	Business636_Postman_1	Business636_Postman_1
08/11/2021, 08:49:40		35.00 GBP	Business636_Postman_1	Business636_Postman_1
08/11/2021, 08:22:18		15.00 GBP	Business636_Postman_1	Business636_Postman_1

You can customise the list to suit your information needs and focus on exactly what you need to investigate. For information, see [How to customise the display](#).

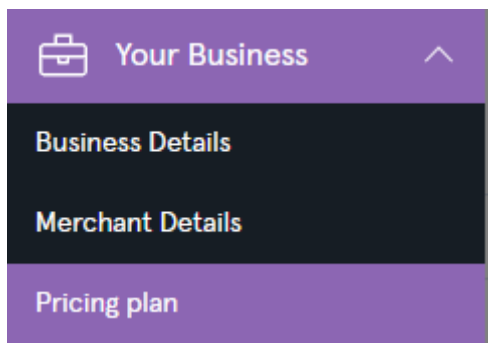
The Transactions page has a search feature that you can use to search for one or more transactions that match specified criteria. For information, see [How to search for transactions](#).

How to view a breakdown of your pricing plans

At any time you can view a breakdown of your account pricing plans for a selected merchant.

To view a merchant pricing plan

1. Sign into Cashflows Go as a partner.
2. Select a business.
3. Select a merchant.
4. Select **Apply**.
5. From the Cashflows Go menu, select **Pricing Plan**.



A full list of pricing plans is displayed for the selected merchant.

Transactional Fees		Dispute Fees	
Authorisation Request Fee	0.22 GBP	High Risk Warnings	10.15 GBP
Decline Fee	0.23 GBP	Chargeback Fee	0.20 GBP
Refund Fee	0.25 GBP	Copy Request Fee	
		Dispute Fee/Pre-arb Fee	0.30 GBP

Merchant Service Charges			
	Domestic	Regional	Rest of the World
Amex	0% 0.00 GBP	0% 0.00 GBP	0% 0.00 GBP
Consumer Credit	2.81% 0.19 GBP	2.88% 0.21 GBP	3.53% 0.19 GBP
Consumer Debit	1.72% 0.33 GBP	2.66% 0.54 GBP	3.49% 0.22 GBP
Corporate Credit	3.14% 0.19 GBP	3.21% 0.21 GBP	3.85% 0.19 GBP
Corporate Debit	3.28% 0.31 GBP	3.14% 0.29 GBP	3.82% 0.21 GBP

Credit Transfer Fees		
Card Scheme	Fee Amount	Fee Percentage
Visa	1.00 GBP	1%
Master Card Domestic Regional	1.00 GBP	1%
Master Card International	1.00 GBP	0%

Gateway Fees		Gateway Transaction Tiers	
Account Updater Fee	100.00 GBP	Transactional Limit (Monthly)	Transaction Fee
Fraud Monitoring Fee	200.00 GBP	1000	0.10 GBP
PCI Compliance Fee (Monthly)	400.00 GBP	2000	0.15 GBP
PCI Non Compliance Fee (Monthly)	500.00 GBP	3000	0.16 GBP
Gateway Fee (Monthly)	20.00 GBP	> 3000	0.20 GBP

How to view a list of all customer in one place

You can view a list of all of your customers (their business IDs and their merchants that are assigned to your partner organisation).

To view all customers in one place

1. Sign into Cashflows Go as a partner.
2. Select a business.
3. Select a merchant.
4. Select **Apply**.
5. From the Cashflows Go menu, select **Partner**.
6. Select the **Associated Businesses** page.

Business ID	Business Name	Business URL	Transactions
100123789	Business636_Postman_1	cashflows.com	View Transactions >
100123790	Business636_Postman_2	cashflows.com	View Transactions >

From the Associated Business page you can:

- Select a business ID to display an Overview of the selected business together with a list of associated merchants.
- Select the business URL to visit the website for the selected merchant
- Select View Transactions to display the Transactions page for the associated business.



Configuration

When you sign in to Cashflows Go as a partner, you have read-only access to the configuration pages of your outlet (merchant) customers. You can see each merchant's account configuration and provide support when your customers have questions or need help with their integration into Cashflows.

To display configuration details:

1. Sign in to Cashflows Go as a partner and select a context, depending on the configuration that you want to display. For information, see [How to choose a partner, business or merchant context](#).
2. From the Cashflows Go menu, select **Configuration**. The Configuration pages are displayed for the business or merchant that you selected. You can see how they have configured:
 - Emails for abandoned payments and order confirmations
 - The webpage addresses (return URLs) to use for redirecting customers after payment processing
 - Where to send payment status updates (notifications)
 - The payment methods that are enabled

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