A man with glasses and a beard, wearing a blue button-down shirt, is holding a large cardboard box. A woman with dark curly hair, also wearing a blue button-down shirt, is pointing at a tablet computer. They are standing in a warehouse with tall metal shelving units filled with cardboard boxes in the background. The lighting is warm and focused on the two people.

Instructions for switching from PSP Basic, Startup or Professional to PostFinance Checkout Flex

PostFinance 

In 2021, PostFinance introduced a new service providing solution – PostFinance Checkout Flex is replacing the Basic, Startup and Professional products, which will be discontinued at the end of 2023. From this point onwards, payments in your online shop can no longer be processed or offered.

We recommend that you configure PostFinance Checkout Flex immediately to ensure a seamless transition. If you have set up your online shop via a web agency, please involve your contact person in good time.

You can find a summary of the most important questions about PostFinance Checkout Flex [here](#).

This guide is designed to help you set up PostFinance Checkout Flex and the most important payment methods: credit card, PostFinance payment methods and TWINT. If you have any questions about the changeover, our **technical support** team will be happy to help. Please refer to the individual step of the guidelines for enquiries.

- By phone: Monday to Friday from 8 a.m. to 5 p.m. by calling +41 (0)848 382 423 (max. CHF 0.08/min. in Switzerland)
- Via e-mail to checkout@postfinance.ch


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1. Basic Configuration

1.1 Registration

Register for PostFinance Checkout via the following link postfinance.ch/checkout. Fill in your details and select the *PostFinance Checkout Flex* subscription.

PostFinance Checkout

Contact and support

Signup

Sign up for free for PostFinance Checkout as Shop Owner.

First Name

Last Name

Email Address

Password

☐ The PostFinance Checkout solution is PCI DSS certified. Accordingly, PostFinance only works with PCI certified partners so as to meet the relevant requirements in Switzerland and abroad. The Payment Card Industry Data Security Standard (PCI DSS) includes the permanent protection of data held on PostFinance Checkout, ensured with annual audits.

Home

Test Account

Getting Started / Setup Plan


Select a plan


POSTFINANCE CHECKOUT FLEX


With PostFinance Checkout Flex you get a flexible and functional payment service providing solution for your online shop. Payment methods can be integrated according to your needs. Separate contracts must be concluded with the appropriate acceptance partners for the selected payment methods.


Choose PostFinance Checkout Flex

Price per live transaction

 CHF0.18 + Commission

 CHF0.18 + Commission

 CHF0.18 + Commission

 CHF0.03 + Commission

CHF19.90

per month

CHF249.00

one-time

Note: if you are unable to find your voucher code, please contact our *technical support* team directly. We will be happy to send you another copy or notify you of this by telephone.

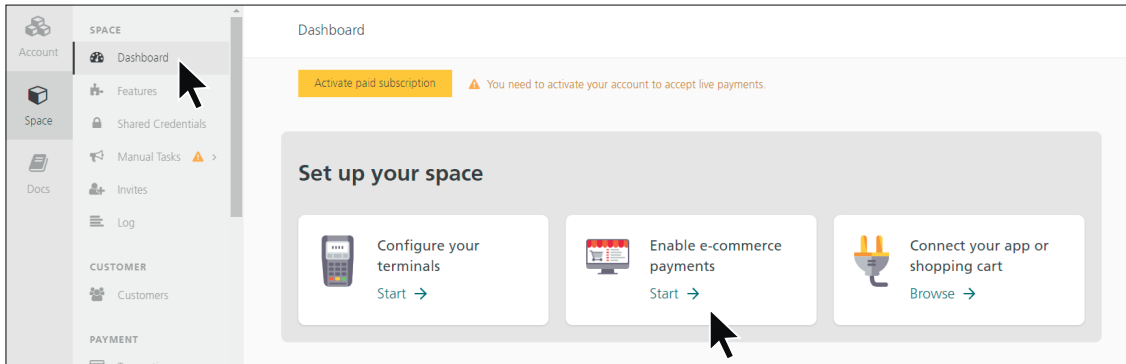
Check whether your voucher code has been saved successfully. Click on *Account* → *Setup Plan* and check whether the voucher code is displayed in the grey field.

2. Select payment methods

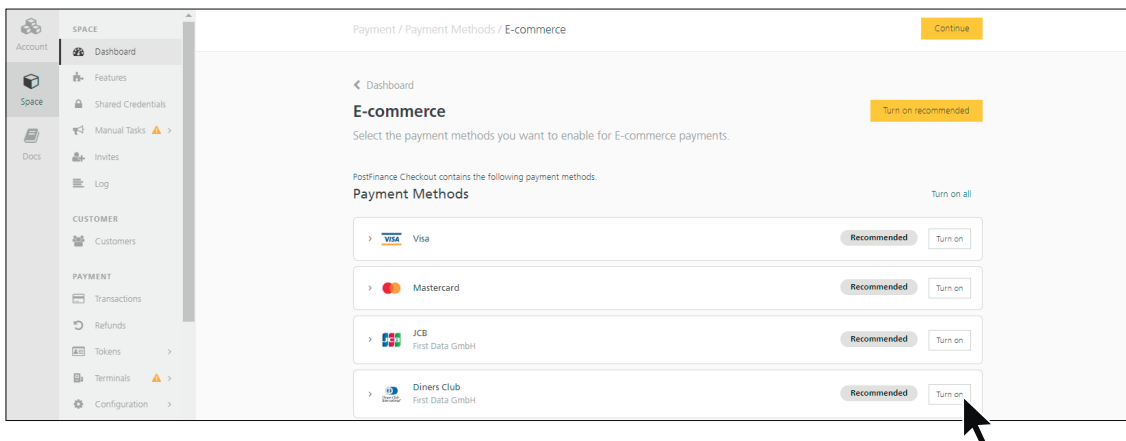
PostFinance Checkout Flex offers you maximum flexibility: you decide which payment methods you would like to offer in your online shop. Make a pre-selection in this step. Modifications are possible at a later date at any time.

2.1 Enable e-commerce payments

Click on *Space* → *Dashboard* and select the option *Enable e-commerce payments*. Start making your selection by clicking on *Start* →.



Select the payment methods you would like to activate in your online shop. Click on the button *Turn on* for the relevant payment methods.

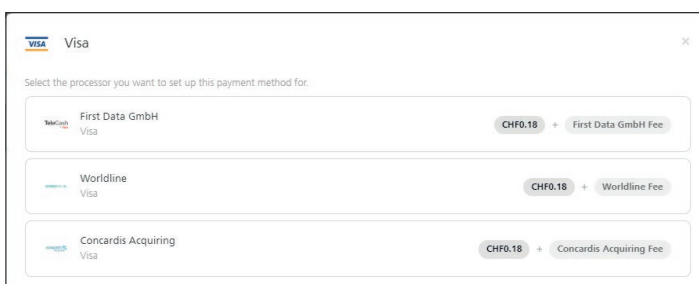


2.2 Selection of acceptance partner

Depending on the payment method selected, a window appears with the possible processors if there are several. Make a selection and then follow the wizard.

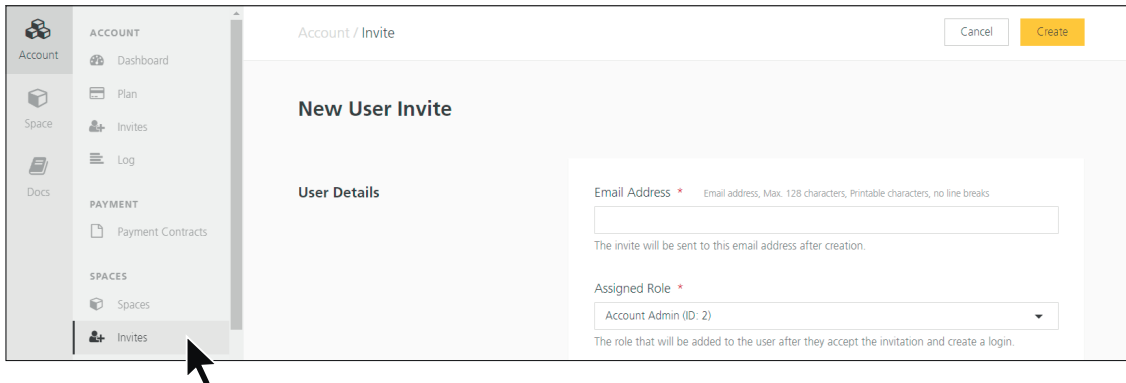
Important: in this step, you make only a pre-selection. The payment method is configured in a later step (see Configuring payment methods).

Note for customers with an existing acceptance agreement: if you already have a contract with an acceptance partner and wish to activate it, select the existing processor with which you already have a contract.



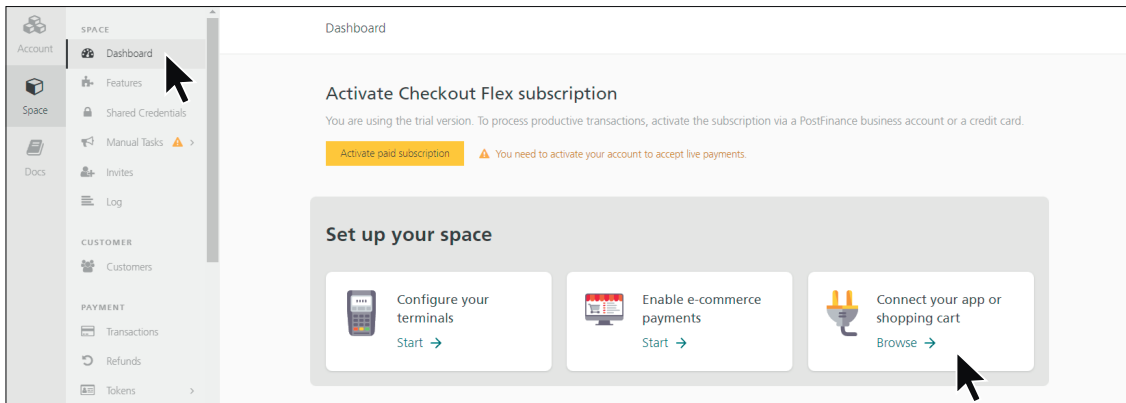
3. Integration into your shop software

Optional: if you set up your online shop with the support of a web agency, enter your contact person under *Account* → *Spaces* and click on *Invites*. With the relevant access, your contact person will receive their own login to the PostFinance Checkout Flex portal and can support you in the integration process.



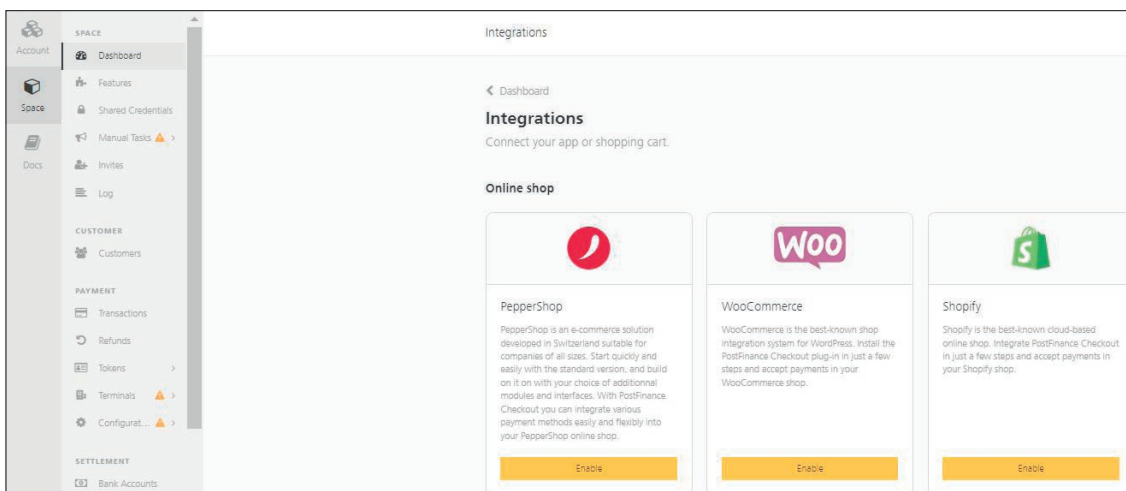
3.1 Integration of PostFinance Checkout Flex into your e-commerce shop system

PostFinance provides plug-ins free of charge for the integration of PostFinance Checkout Flex into the most common shop software. Click on *Space* → *Dashboard* and select *Connect your app or shopping cart – Browse* →.



Note: depending on the shop software you use, integration takes place directly via plug-in (standard software) or via web service API (non-standard software).

– *Integration with standard software* (your shop software is listed in the overview): the plug-ins can be downloaded directly from our [GitHub](#).



– *Integration with non-standard software* (shop software does not appear in the overview. Requirements: advanced technical knowledge). We recommend that you discuss the integration with your web agency.

Documents

All technical documents and instructions such as the connection via plug-ins can be found [here](#).
On the menu left you will find details on the basic features, payment, customization, system connection and under API reference interface documents as well as a client for integration via REST web services.

Important links from this documentation:

- [Integration modes](#)
- [Available acceptance partners \(processors\)](#)
- [Webhooks](#)
- [Interactive REST client for tests](#)
- The documentation for the REST Web Service API can be found under *API REFERENCE*

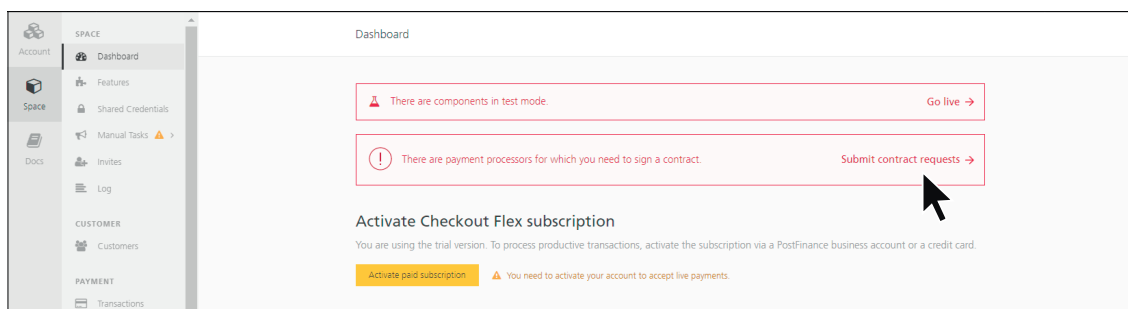
4. Configuring payment methods

In this step, you will configure your payment methods. Enter your contact and online shop data. PostFinance then sends your details to the selected acceptance partner. The acceptance partner will contact you by telephone or e-mail with a corresponding offer in the next few days.

4.1 Set up payment method

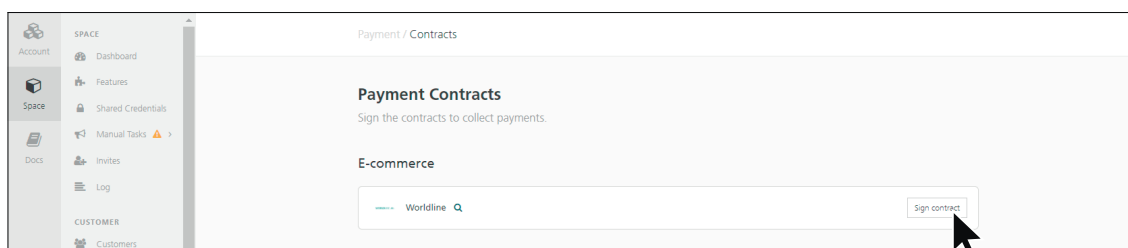
For the payment methods indicated in step 2.1, corresponding configurations must now be made.

To do so, click on Space in the menu. The information *There are payment processors for which you have to sign a contract* appears. Follow the wizard by clicking on *Submit contract requests* →.



4.2 Credit card payment method

Select the desired acceptance partner and confirm by signing the contract.



There are two options for creating a contract:

- You already use our PSP Startup or Professional and *have an existing acceptance agreement*: please activate the *I already have a contract* checkbox and complete the remaining fields.
- *You do not yet have a credit card acquiring contract or would like a new offer as a comparison*: request the offer directly by entering your details.

Note for customers without an existing credit card acquiring contract: for the *acceptance partners Wordline and Concardis*, the offer will be sent to you directly by e-mail by the respective acceptance partner. Please check your inbox regularly and return the documents so that the contract can be activated.

Important: please note that PostFinance has no influence over the time period for the delivery of an offer from this acceptance partner (may take several weeks). If you have any questions about the status of your offer, please contact the relevant acceptance partner directly:

Nets | Concardis
servicech@nets.eu
+41 (0)58 220 58 58

Wordline | SIX
New customers (without existing contract)
e-commerce@six-payment-services.com
Customers with existing contract
cs.ecom@six-payment-services.com
+41 (0)848 83 20 00

At acceptance partner **First Data GmbH**, the PostFinance advisor will contact you directly and accompany you on conclusion of the contract.

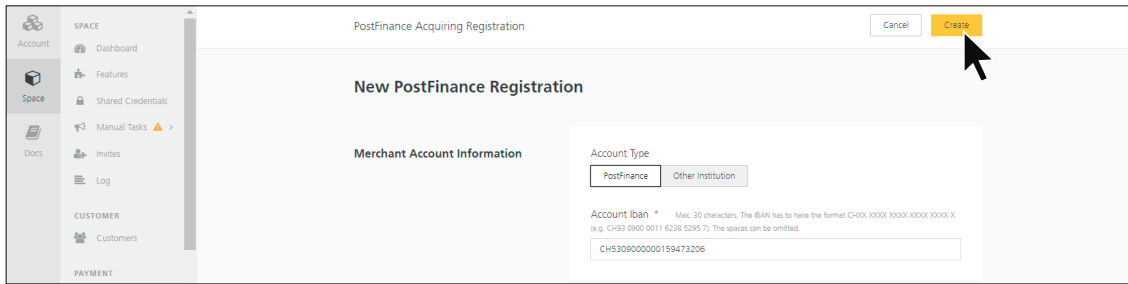
Follow the instructions and enter your contract data.

4.3 PostFinance payment method (PostFinance acquiring)

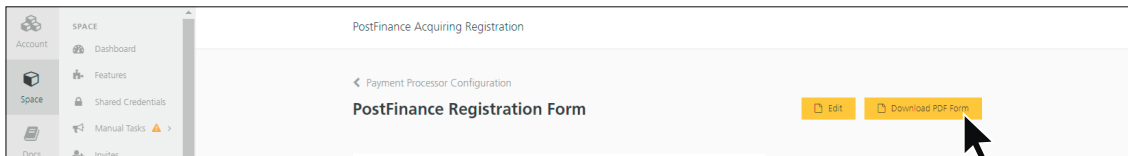
A new PostFinance acquiring contract must be submitted in order to offer the PostFinance payment methods in your online shop. To do so, click on *PostFinance Acquiring – Sign contract* on the dashboard.

And select the link *PostFinance Acquiring registration form*. The *Merchant ID* field can be left open. We will take care of this step for you as soon as the contract has been activated.

You will be taken to the wizard. Enter the details and press the *Create* button.



Download the prepared form by clicking on the *Download PDF Form* button.



Print out the form, fill in the missing details and return it in full in E-Finance or by post.

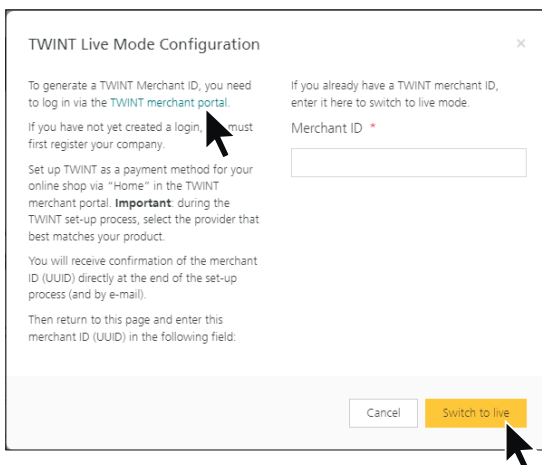
4.4 TWINT payment method

The TWINT payment method can be concluded either directly via TWINT Ltd or via Wordline. The following process applies to activation directly via TWINT Ltd.

Register for the TWINT merchant portal. Click directly on the link shown for the *TWINT merchant portal*. If you already have a login, you must open an additional shop.

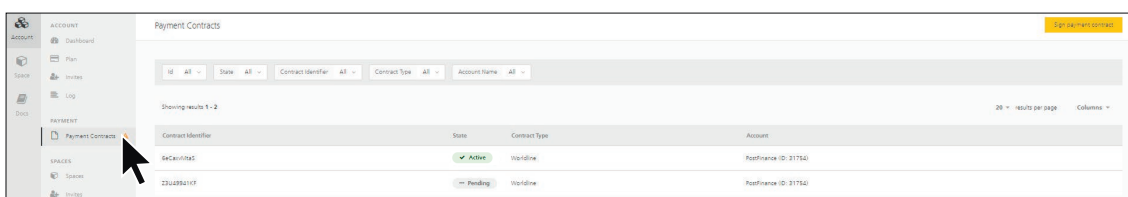
Important: select PostFinance Checkout Flex as your PSP partner

You will receive the UUID immediately – transfer it to the Merchant ID field and confirm by clicking on *Switch to live*.



4.5 Check payment method status

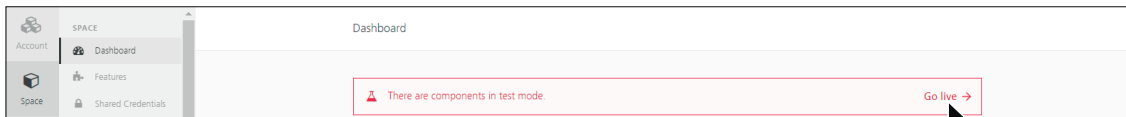
Check the status of your payment method under *Account* → *Payment contracts*. If they have the status *Active*, the contracts are available, can be stored and used for your online shop.



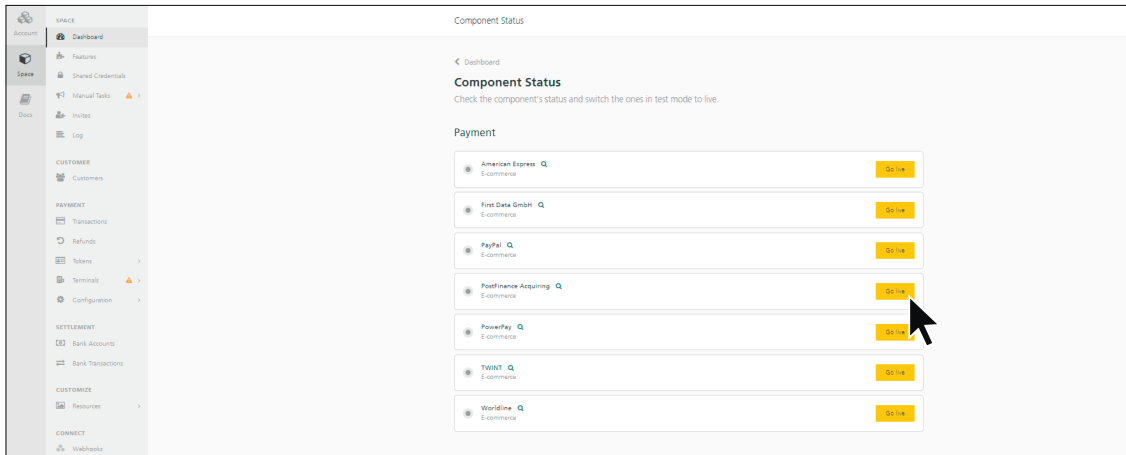
Contract Identifier	Status	Contract Type	Account
84C481745	Active	Wordline	PostFinance ID: 317542
224282418	Pending	Wordline	PostFinance ID: 317542

4.6 Switch payment methods live

The note *There are components in test mode* appears under *Space → Dashboard*. Click on *Go live* →.



Click on the *Go live* button for each payment method you define.



Note: the payment method must always be activated *Go live* to ensure that the customer makes a purchase using their data and that the money actually flows (test and productive payments cannot be distinguished in your shop software, only in PostFinance Checkout Flex). Make sure that all payment methods are live before you change over in your shop software.

5. Activate Checkout Flex subscription

In this step, we will show you how PostFinance Checkout Flex can be set to “productive” so that transactions can be processed via the new platform in future.

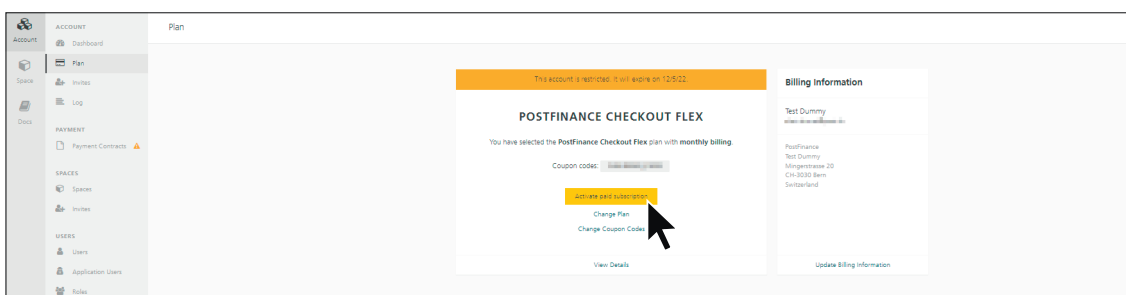
Notes:

- We recommend that you carry out test transactions in your online shop before activation.
- In order to carry out productive transactions, the subscription must be activated beforehand and the payment methods activated as in section 4.2 Live.

5.1 Activation of PostFinance Checkout Flex

Please note that it will take approximately five working days for PostFinance to check and activate the service. As soon as PostFinance has reviewed and activated the service, you will receive an e-mail confirmation from us. From the go-live, the monthly and transaction fees begin to run.

Click on *Activate paid subscription* to activate. You can store a credit card or a PostFinance business account.



5.2 Cancel PSP Basic, Startup or Professional

If PostFinance Checkout Flex has been fully set up and linked to your online shop, the existing PSP can be cancelled. Please then forward an e-mail to checkout@postfinance.ch with the subject *Cancellation PSP*, stating your PSP ID or company name. Please note in your message that this is a change to Checkout Flex. The existing PSP service will therefore be cancelled with immediate effect.

Note: please ensure that no further transactions are expected from the existing PSP (credits, refunds, etc.). If in doubt, we recommend that you continue using existing PSP Startup or Professional in a parallel phase.

We wish you every success with the changeover – we look forward to continuing to count you as one of our satisfied customers.