



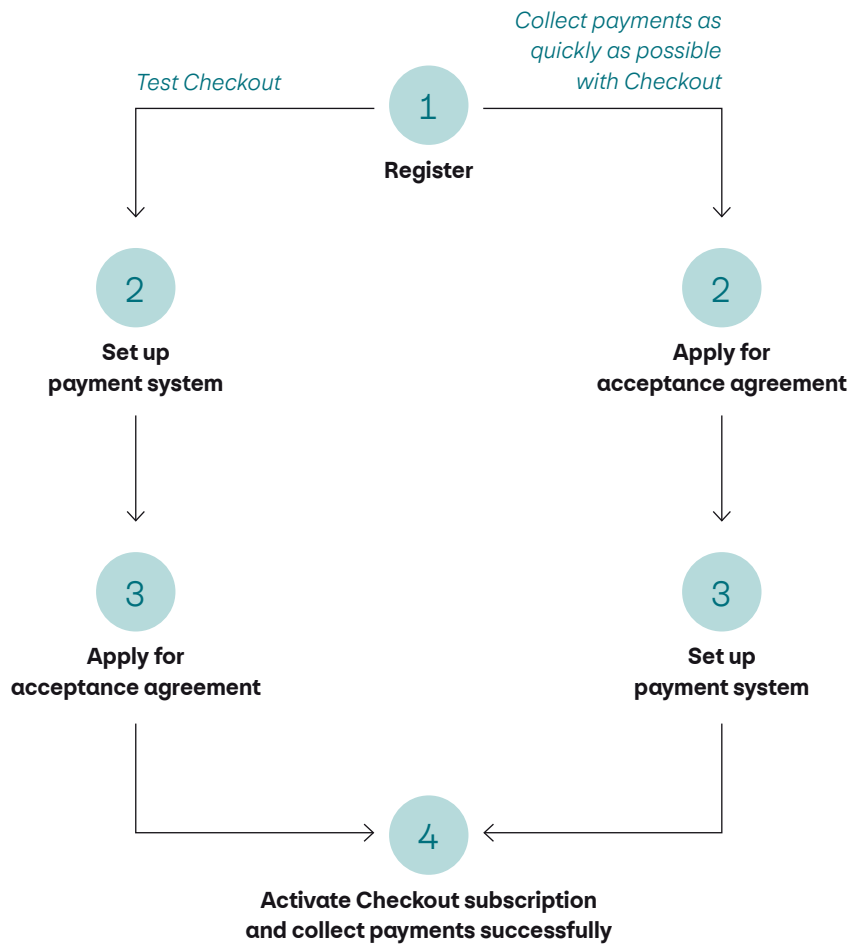
Instructions for opening Checkout e-com bundle

Successful transactions in four steps


Successful transactions in four steps

Thank you for choosing Checkout e-com bundle.

This booklet guides you step by step through the setup of the Checkout portal, the configuration of payment methods and the connection of the Checkout e-Com bundle payment solution to your online or app shop. You'll be ready for your first transactions in just four steps.



Step 0: Choice of payment solution

<p>Checkout Checkout All-in One</p>  <p>Optimal starter package Ideal for online shops with an annual turnover of up to CHF 200,000 wanting an easy start and aiming to develop themselves.</p> <p>Contractual partner ⓘ <ul style="list-style-type: none"> • PSP with PostFinance ⓘ • Acceptance partner Wallee/SnapSwap </p> <p>Payment methods included ⓘ Visa, Mastercard, PostFinance Pay, TWINT, Apple Pay, Click to Pay </p> <p>Subscription costs ⓘ <ul style="list-style-type: none"> • One-off set-up fee of CHF 199 • CHF 14.90 per month </p> <p>Transaction costs ⓘ <ul style="list-style-type: none"> • 2.5%, at least CHF 0.20 Additional PSP processing fee per transaction: free of charge </p> <p>Test it now free of charge</p>	<p>Checkout E-Com Bundle</p>  <p>Best value for money Ideal for online shops with an annual revenue of CHF 200,000 or more that want to benefit from attractive conditions.</p> <p>Contractual partner ⓘ <ul style="list-style-type: none"> • PSP with PostFinance ⓘ • Acceptance partner Wallee/SnapSwap </p> <p>Payment methods included ⓘ Visa, Mastercard, PostFinance Pay, TWINT, Apple Pay, Click to Pay </p> <p>Subscription costs ⓘ <ul style="list-style-type: none"> • Set-up fee for free • CHF 19.90 per month </p> <p>Transaction costs ⓘ <ul style="list-style-type: none"> • PostFinance Pay: 1.3% (min. CHF 0.20) • TWINT: 1.3% (min. CHF 0.20) • Visa/Mastercard: 1.55% (min. CHF 0.20) Additional PSP processing fee per transaction: CHF 0.18 </p> <p>Test it now free of charge</p>	<p>Checkout Checkout Flex</p>  <p>Maximum flexibility Ideal for online shops with a yearly revenue of CHF 200,000 or more that want to choose their acceptance partners and payment methods flexibly and prefer individual pricing.</p> <p>Contractual partner ⓘ <ul style="list-style-type: none"> • PSP with PostFinance ⓘ • Free selection of acceptance partner </p> <p>Payment methods included ⓘ Free choice of numerous payment methods and acquirers </p> <p>Subscription costs ⓘ <ul style="list-style-type: none"> • One-off set-up fee of CHF 249 • CHF 19.90 per month </p> <p>Transaction costs ⓘ <ul style="list-style-type: none"> • Dependent on the pricing list of your chosen acceptance partners Additional PSP processing fee per transaction: CHF 0.18 </p> <p>Test it now free of charge</p>
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Find out more and select a price plan

- Find out more on our website about the [Checkout payment solution](#) and the “E-com bundle” price plan.
- Select the Checkout e-com bundle to test the offer in simulation mode with no obligation.

Step 1: Register

PostFinance PostFinance Checkout [Contact and support](#)

Signup

Sign up for free for PostFinance Checkout as Shop Owner.

First Name

Last Name

Email Address

Password
At least 12 characters, including 1 letter and 1 number.

☐ I accept the Checkout data protection and plug-in conditions

[Sign up now](#)

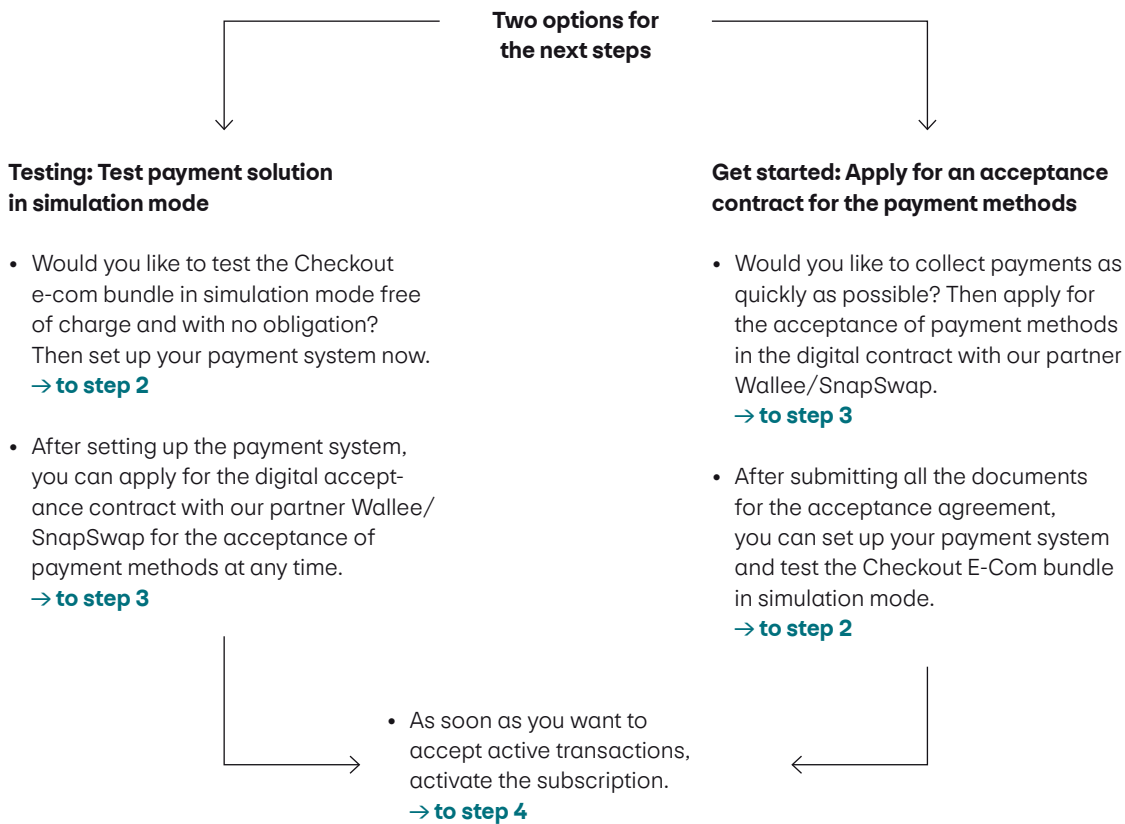
[Login for registered users >](#)

Free registration:

- Register for Checkout free of charge by entering your details, selecting a secure password and reading and accepting the conditions.
- When you register, your 30-day free test phase starts in simulation mode. The test phase can be extended at any time. After registering, you always have the option of ending the test phase by activating the e-com bundle subscription. You will only be charged subscription and transaction costs once the subscription has been activated (see step 4).
- Confirm your choice of e-com bundle by clicking on “Continue and test free of charge”.
- Enter your details and click on “Next”.
- You will receive an e-mail to verify your e-mail address. To do so, click on the link in the e-mail.
- Your profile has now been created.

Next steps:

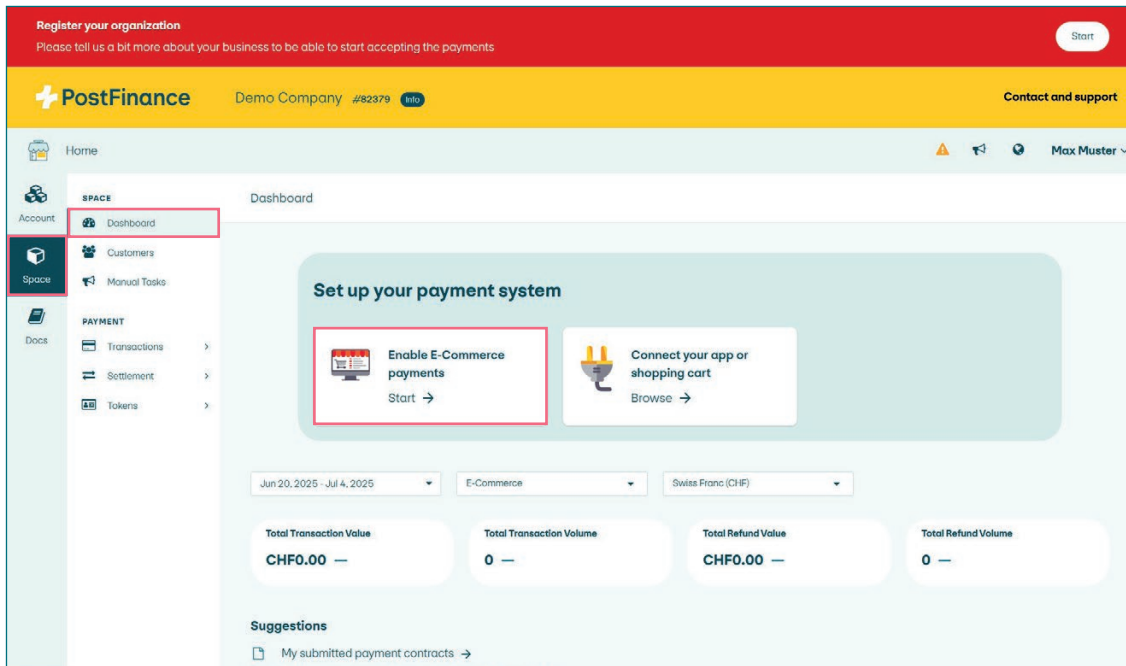
Set up test version or conclude contract and get started



Note

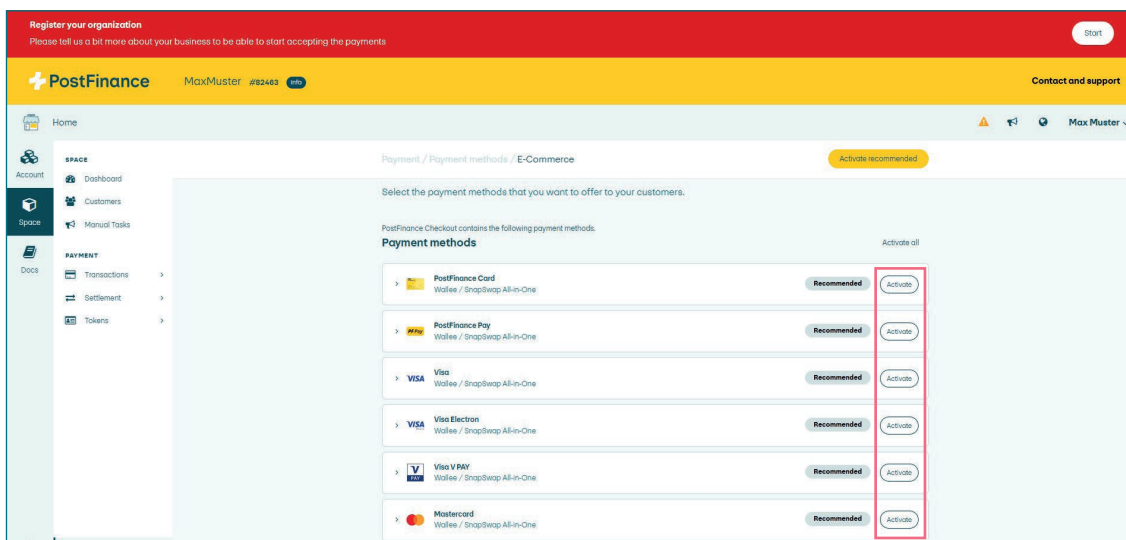
- Can Checkout be connected to your shop system using a plug-in? If so, we recommend that you absolutely test Checkout in simulation mode to check whether the solution or plug-in works for you. Our plug-ins have been tested with the standard configurations of compatible shop systems. However, PostFinance cannot guarantee that the plug-ins will function correctly in the event of modifications or special configurations of the shop systems.
- Once all the documents required to apply for the acceptance agreement have been submitted in full, the documents will be checked by Wallee/SnapSwap and you can generally carry out the first transactions within ten days and after activation of the subscription. As long as you have not activated the subscription (see step 4), you will be in test mode and no costs will be incurred.

Step 2: Set up your payment system



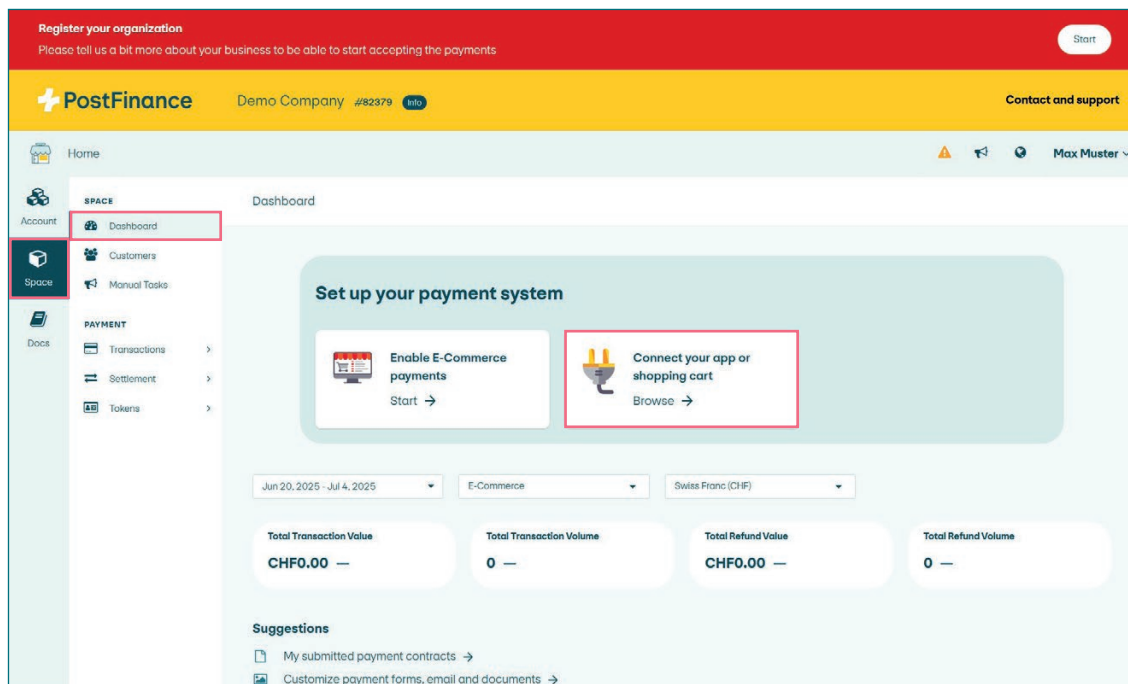
Set up payment system

- Set up your e-commerce payments under “Space” – “Dashboard”.



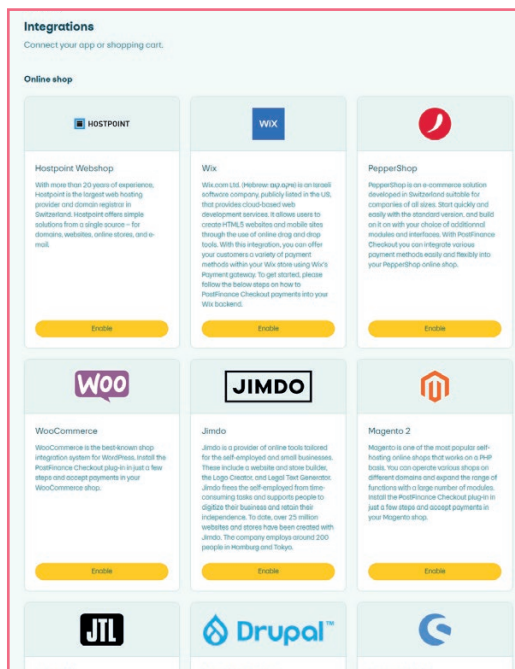
Activate payment methods

- Activate all the payment methods that you want to accept in your online shop.



Connect Checkout to your online shop or app

- Connect your app or online shop under “Space” – “Dashboard”.



Connecting Checkout
to your shop system

Connect Checkout to your online shop or app

- Select your shop system and connect Checkout to your shop system in the next steps.
- The connection works differently for each shop system. Detailed technical instructions for connecting Checkout to your shop system can be found here:

https://checkout.postfinance.ch/en-us/doc#_plugin-manuals

Step 2: Set up the payment system – Side note

The image shows two parts of the WooCommerce setup process. On the left is the 'Integrations' page for WooCommerce, showing an 'Install plug-in' section and a 'Generate security keys' section. A red box highlights the 'Details' section with a 'Create User' button. An arrow points from this button to the 'Application User: Credentials' dialog on the right. This dialog has fields for 'Space ID', 'User ID', and 'Authentication Key', all of which are populated with example values. A warning message at the bottom states: 'Once you close this window, you won't be able to see the authentication key again, so please write it down.'

The image shows the 'PostFinance Checkout' settings page in the WordPress admin. The 'General' tab is selected. The 'User Id', 'Application Key', and 'Space Id' fields are highlighted with a red box. Below these fields are sections for 'Email Options' (Send Order Email), 'Document Options' (Invoice Download, Packing Slip Download), and a 'Save changes' button at the bottom left.

Checkout connection – using the example of woocommerce

- Once you have selected your shop system in the Checkout portal, create your user. Copy the space ID displayed, the user ID and the authentication key.
- Installation and configuration in the WordPress backend:
 - Installation: Search for “PostFinance Checkout” under “Plug-ins – Add new” in your WordPress backend. The plug-in will be visible under Plug-ins and can be installed directly. Once the plug-in is installed, you can open the configuration.
 - Configuration: Enter the previously copied Space ID, user ID and authentication key under “WooCommerce” – “PostFinance Checkout” in your WordPress backend. When you save, you synchronize with Checkout.

Step 3: Apply for an acceptance agreement

Register your organization
Please tell us a bit more about your business to be able to start accepting the payments

PostFinance Demo Company #88884 **Start** **Contact and support**

Home **Start** Max Muster

ACCOUNT
Dashboard
Plan
Organization

FINANCE
Balances

PAYMENT
Payment Contracts
PostFinance ISR

SPACES
Spaces

USERS
Users
Application Users
Roles

Register Organization

Instructions for completing the application

Your security is very important to us. Like all other providers, Wallee SnapSwap is subject to statutory directives and regulations guaranteeing the security of transactions. We take the examination of your documents seriously – it's your money, after all. **As soon as we have received all the necessary documents from you**, you can usually carry out the first transactions within **ten days** of concluding the contract. La vérification de l'identité se fait par le téléchargement de la carte d'identité ou du passeport. Your identity is verified by uploading a form of ID or your passport. When entering your personal details, you must ensure that the first and last names are identical to the names on the identity documents submitted and to those in the commercial register entry.

To ensure that the application can be reviewed successfully, we kindly ask you to take note of the following points:

1. Please enter your company identification number (UID, commercial register number) and VAT number, if you have them.
2. Anyone listed in the commercial register with signing rights and/or a management function must be entered as beneficial owners in the application.
3. All shareholders/partners/participants with more than 25 percent control must also be entered as beneficial owners, indicating the percentage.
4. If the company's ownership structure cannot be determined from the commercial register, an extract from the organization's shareholder/partner/participant register must be uploaded following submission. You can find a template for this [\(here\)](#).
5. Please note that the application must be submitted by an authorized signatory (individual or collective). Alternatively, a corresponding power of attorney in the organization can be uploaded after submission. You can find a template for this [\(here\)](#).

Request a contract for the payment methods

- Start applying for the acceptance agreement by entering your organization via the red banner displayed or via “Account” – “Organization”.

Register Organization
Continue

Register organization

Business location

Select the country in which your business is registered.

Switzerland

Organization
Cancel
Register

Register organization

Company details

Business name *

Please make sure this is the exact, full legal name of your company.

Legal form *

Incorporation year *

Specify the year in which your organization was founded.

Business identification number *

Commercial register number, UID number

Sales tax number

Listed on regulated stock exchange

☐ Company is listed on regulated stock exchange

Enter organization

Enter all the necessary details:

- Headquarters of the organization
- Company details
- Company
- Payment methods that your company would like to offer ¹
- Your person
- Performance
- Location of the terminal(s) (if terminal available)
- Contract details
- Business address
- Beneficial owners and directors
- Bank account

¹ All payment methods already selected (for e-commerce) are included in the e-com bundle. If you would like to expand your business to omnichannel (in-store and online shop sales) at a later date, we recommend that you also indicate this here by selecting the "Physical terminal" option under "Payment methods". If required, you can easily initiate a product change from the e-com bundle to one of our omnichannel solutions in the Checkout portal without having to reapply for the acceptance agreement with Wallee/SnapSwap.

Application and identity check

- After an initial quick check by Wallee/SnapSwap, you will receive an e-mail from Wallee/SnapSwap with a link for identification.
- All authorized persons specified in the application must identify themselves via an identification link. Your application will then be fully checked by Wallee/SnapSwap.
- Upon successful verification, you will receive an e-mail confirmation from Wallee/SnapSwap stating that your acceptance contract is now active. You can also see the active payment methods in the Checkout portal under “Account” – “Organization” – “Contracts”.

E-mail for identification



Identification of authorized persons



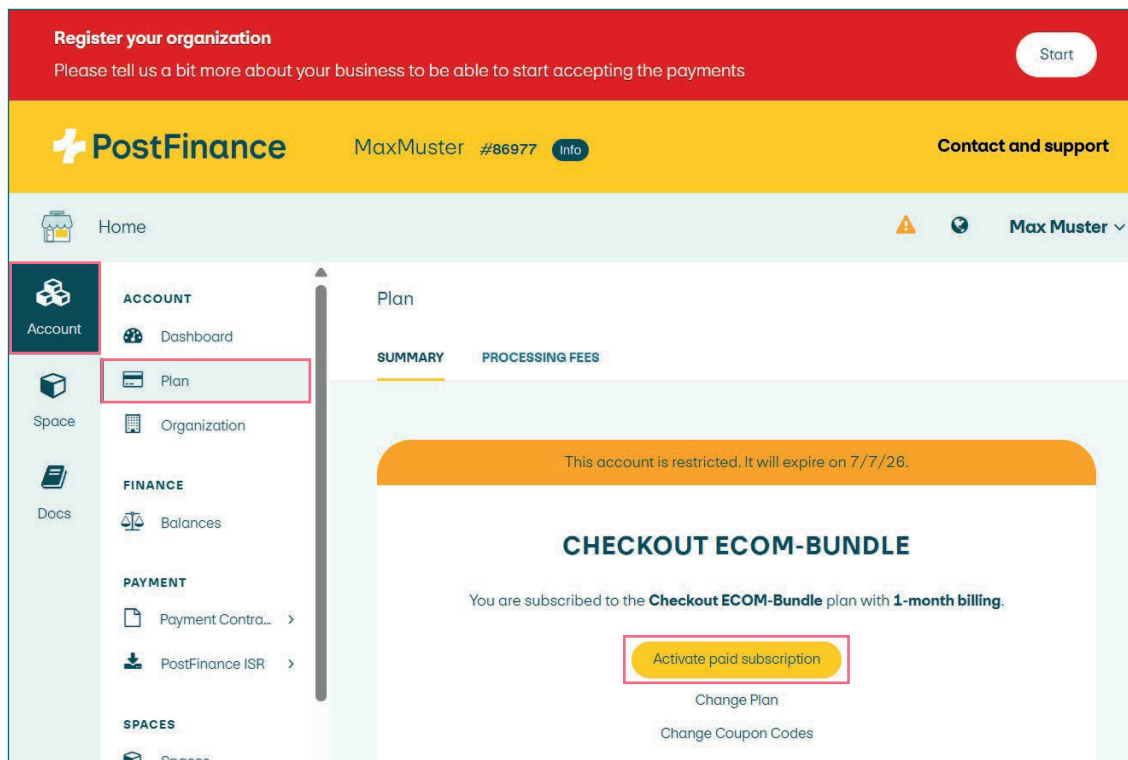
Confirmation e-mail for active acceptance agreement



You have already set up the payment system: → **to step 4**

If you have not yet set up the payment system: → **to step 2**

Step 4: Activate subscription



Activate subscription

- Start activating your e-com bundle subscription by clicking on the red banner or by going to “Account” – “Plan”.

Plan / Create Billing Data
Cancel
Create

New PostFinance Billing Data

Account Number

To fully activate the account please enter here the PostFinance bank account number (IBAN) which should be charged for the payment services.

Notification Email

This email will be used to notify you during the approval process of your account.

Company Information

PostFinance Billing Data

In order to complete your sign up and to be able to process payments, you need to either link your PostFinance bank account or enter your credit card data.

☐ I accept the terms and conditions Checklist.

What you have to do when sending us personal data about other people, you therefore confirm that you are authorized to do so and that the data is correct. Please ensure that these third parties have been informed before notification that we will process their data, and forward them the "Information on data protection" document or our General Privacy Policy which can be found at postfinance.ch/dps.

☐ The Checklist 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, covered with annual audits.

I acknowledge and consent to my data and the data of my shoppers being stored by software provider Wolkei Ltd, Wirtshausstrasse 10, 8001 Zurich, Switzerland (subsidiary of Amazon Web Services EMEA SARL, Luxembourg subsidiary of Amazon Web Services Inc., USA) on its servers in Ireland and being verified by the Web Application Firewall (WAF) from Cloudflare Inc., USA. To check the data for malware, the WAF has to decrypt it for a short time. This process is a mandatory PCI device which serves to protect your data. The data encrypted in the WAF checking process abroad is no longer subject to Switzerland's Federal Act on Data Protection or banking secrecy, rather the European General Data Protection Regulation (GDPR) or other applicable legal systems. I hereby undertake to inform my shoppers of this. This duty to provide information is an element of Swiss data protection legislation.

I know the legal requirements to my online shop, so that the acceptance contracts can be concluded without queries:

- (1) Company name, authorized signatory and address have been correctly recorded in the contact details section
- (2) Reason industry with extract from the commercial register
- (3) Shop URL is active or test access data is available
- (4) GTD Click to accept is present
- (5) GTD post-activation / jurisdiction is available
- (6) Publication details are available (Complete company address with contact options: telephone or e-mail)

IBAN *

Notification Email *

Company Founding Year *

Account Type

Single Signature
Joint Signature

Authorized Person

Salutation *

Given Name *

Family Name *

Nationality *

Date Of Birth *

00 00 0000
Month Day Year

Enter Credit Card Data
Connect PostFinance Account

Activate Checkout subscription

- Enter either your PostFinance business account or your credit card for the monthly fee debit. With a PostFinance account, the monthly subscription fees are debited directly from your account. With a credit card, they are debited monthly from your credit card.
- As soon as you have created and submitted the invoice data, the subscription will be activated by PostFinance. Activation may take one to two working days.
- You will receive a confirmation e-mail from PostFinance as soon as the subscription is active. From this point on, you will be able to accept the first transactions.

Thank you very much!

We look forward to working with you and wish you every success with the e-com bundle.

PostFinance Ltd
Mingerstrasse 20
3030 Bern

By telephone:

Monday to Friday from 8 a.m. to 5 p.m.
by calling +41 848 382 423

Using the contact form:

postfinance.ch/checkout-support