

TradeSafe for WooCommerce – Onboarding Guide

Jan 24



Management Oversight by



Standard Bank



A Massive Thank You



Hi there,

We just want to say that you are a rockstar and thank you for choosing us as a payment gateway for your WooCommerce store.

You are helping us in our mission to bring confidence back to the South African public who are scared of purchasing online. Thank you for helping us capture this untapped market.

We wish you an awesome journey with us, and that your store goes to new heights 🦄 🚀

Let's Goooooo

The TradeSafe Team

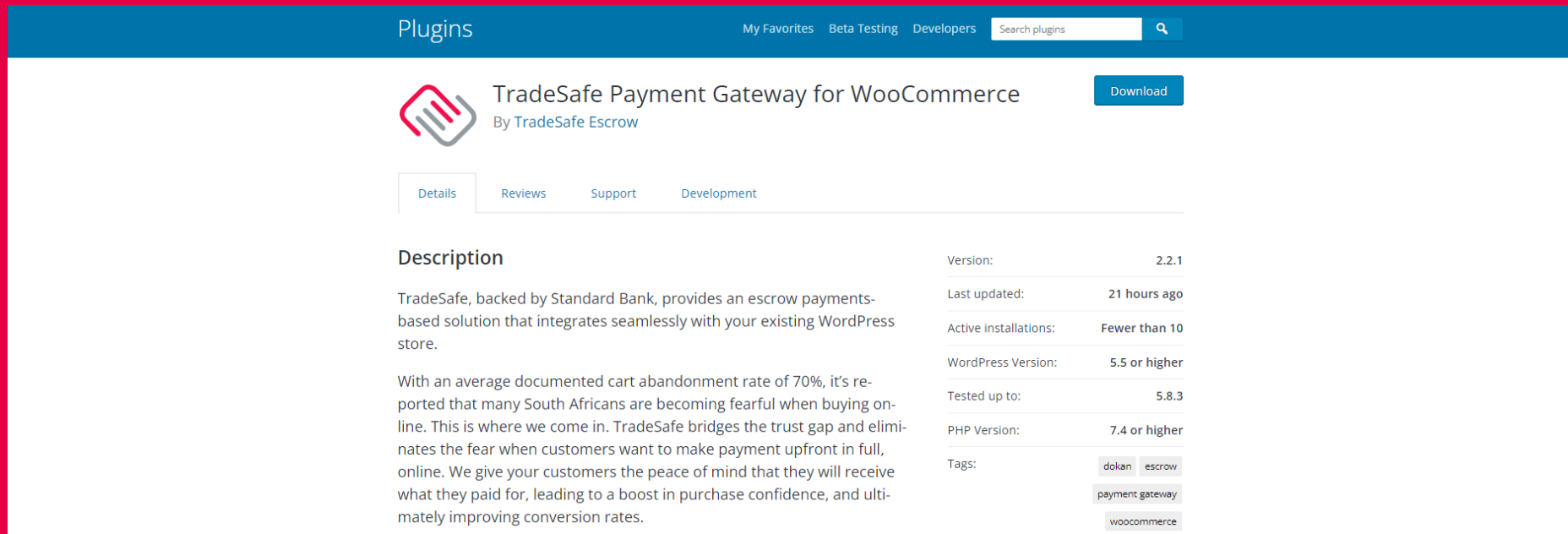
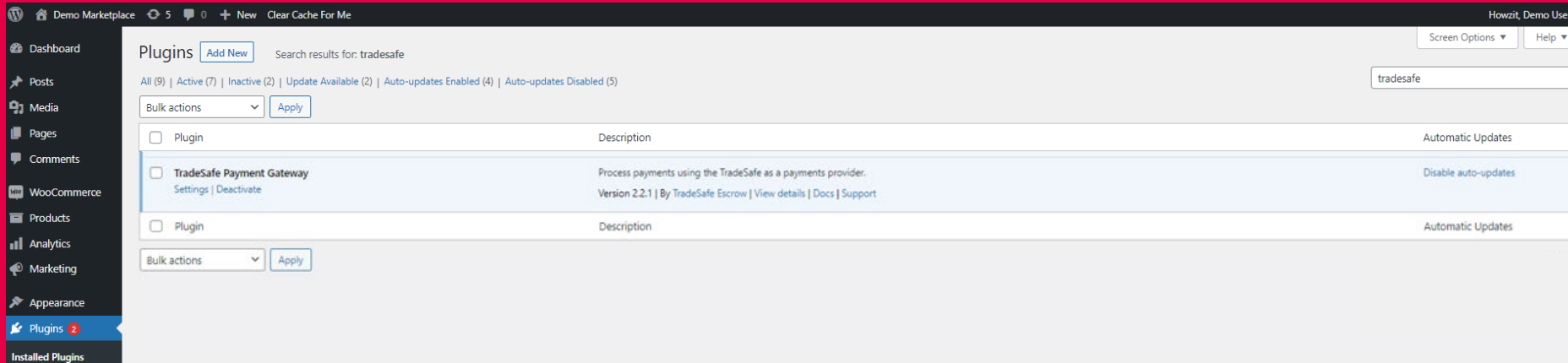
We know you are a rockstar...but



If you get stuck along the way, do not hesitate to reach out to us for help.

- Email us at support@tradesafe.co.za
- Phone us on 010 020 3101
- Or if you really want to go savvy...ask us to invite you to Slack.

1st Step – Install WooCommerce



- This can be done on WordPress under Plugins. Search for TradeSafe
- Or alternatively, go to <https://wordpress.org/plugins/tradesafe-payment-gateway/> to install manually
- TradeSafe documentation on WooCommerce is also available here [TradeSafe API Documentation](#)

1st Step – Install WooCommerce (continued)



Payments

General Products Tax Shipping Payments Accounts & Privacy Emails Integration Advanced Buy Now

TradeSafe

Enable/Disable Enable TradeSafe

Title

Description

Callback Details

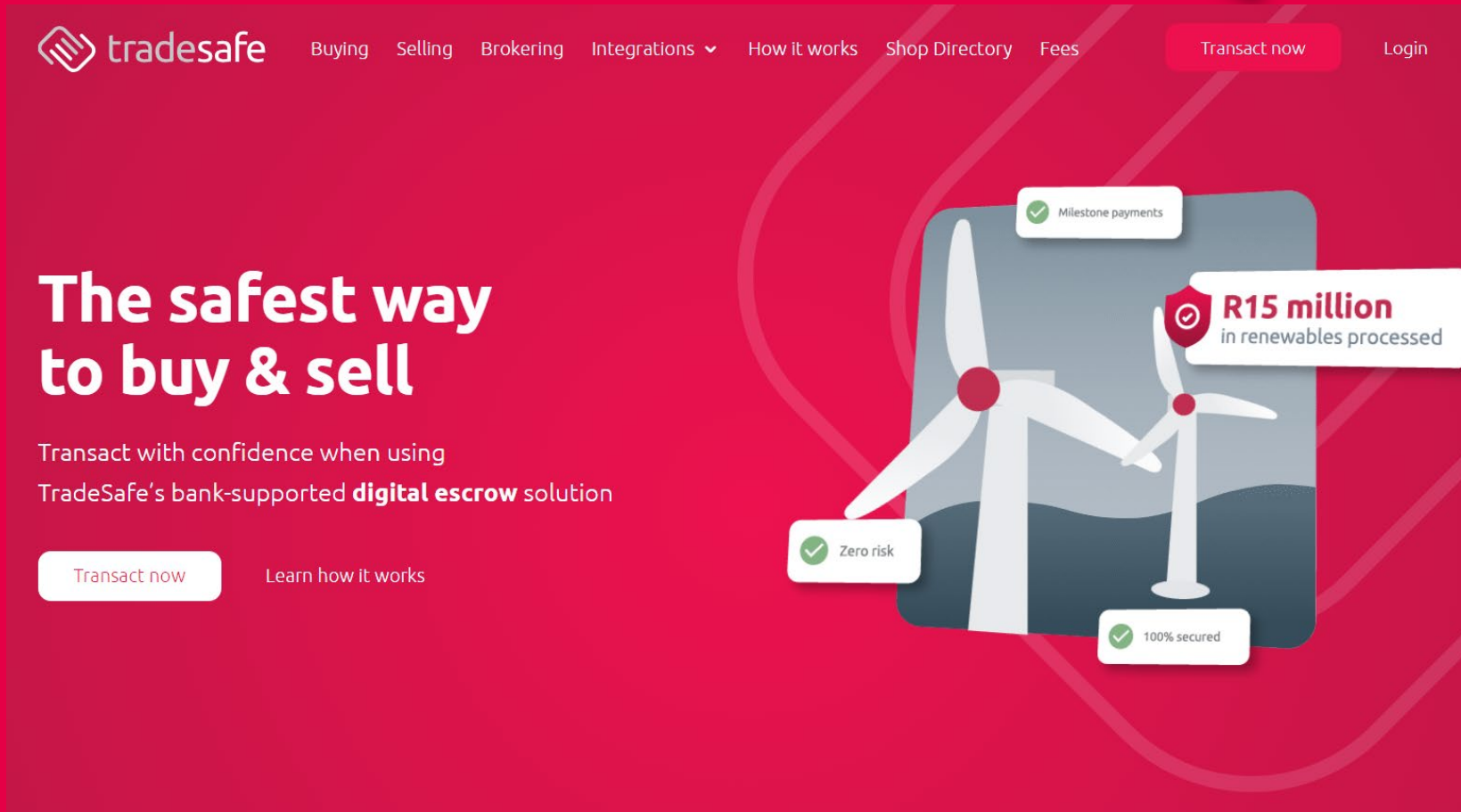
The following urls are used when registering your application with TradeSafe.

OAuth Callback URL	https://demo.tradesafe.dev/tradesafe/oauth/callback/
API Callback URL	https://demo.tradesafe.dev/tradesafe/callback/
Success URL	https://demo.tradesafe.dev/my-account/orders/
Failure URL	https://demo.tradesafe.dev/my-account/orders/

[Register Application](#)

- Once installed, go the plugin page in WordPress, enable the plugin and click Settings.
- At the top of the settings page, you will find the necessary URLs which you would need to set up your TradeSafe merchant account. You can copy and paste these URLs.
- Please be aware of the success URL for a fast checkout transaction. The user will be redirected to a login screen. We request that you have a success payment screen available which the success URL can point to.
- You will not be able to save your settings, or configure the plugin further until you have signed up your TradeSafe merchant account and registered your application.


2nd Step – Setup TradeSafe Merchant Account



- Go to www.tradesafe.co.za
- Click **TRANSACT NOW** to start the registration process.

2nd Step – Setup TradeSafe Merchant Account



 tradesafe

Benefits


- ✓ **Quick and easy registration and verification**
Our digital process makes registering your personal or business account a breeze
- ✓ **Your funds are secure**
The funds are insured, audited, and has management oversight from Standard Bank
- ✓ **Your data is safe and confidential**
Information is encrypted using the highest-industry standards
- ✓ **Wallet and lay-by functionality**
Buyers can use an escrow wallet for future transactions or to save up towards the purchase price

Sign Up to TradeSafe

FIRST NAME *

LAST NAME *

E-MAIL ADDRESS *

PASSWORD * 

CONFIRM PASSWORD *

I AGREE TO [TRADESAFE'S TERMS AND CONDITIONS](#)

I AGREE TO USE TRADESAFE FOR LOCAL TRANSACTIONS ONLY

SUBSCRIBE TO TRADESAFE'S NEWSLETTER

[SIGN UP](#)

Have an account? [Sign in](#)

- You will then be asked to provide your personal details.
- The password must contain 8 or more characters, a number, an uppercase character, a lowercase character.
- Agree to our Terms of Service and that your store is for local transactions only.

2nd Step – Setup TradeSafe Merchant Account



Good Morning, John Doe
Today is Friday, 14 July 2023

Transacting as


Let's Set Up Your Profile

Are My Details Safe?

General Details | Verify Mobile | Verify Email | Add Your Company | Banking Details

Please provide basic information on you, the person who will use TradeSafe.

Please ensure you have correctly entered your ID or passport number. TradeSafe performs a number of verification procedures to comply with South Africa's regulations, as well as to ensure the integrity of the transaction.



UPLOAD

REMOVE

First Name: John | Last Name: Doe

ID Type: National ID | ID Number: 000000000

NEXT

Number of Transactions Processed	Total Value of Transactions Processed	Total TradeSafe Fees	Preferred Transacting
0	R 0.00	R 0.00	General Goods

- Fill in the remainder of the required information including the ID number mobile number, and email address of the merchant account owner
- Please ensure these details are correct as we perform a number of verification procedures.
- Add your picture to give your profile more panache.
- Click NEXT to save changes and continue

2nd Step – Setup TradeSafe Merchant Account



A screenshot of the TradeSafe merchant account setup interface. The page has a dark blue sidebar on the left with navigation options: Dashboard, Escrow Wallet, Transactions, Manage Account (Profile, Password, Bank Account, Address, Settings). The main content area is white and features a modal titled "Let's Set Up Your Profile" with a lock icon and the text "Are My Details Safe?". The modal has five tabs: "General Details" (selected), "Verify Mobile", "Verify Email", "Add Your Company", and "Banking Details". Below the tabs is a red circular icon of a storefront. Text in the modal includes: "TradeSafe was built for individuals and businesses.", "Please indicate for what purpose you intend using TradeSafe.", and "I would like to use TradeSafe:". There are three buttons: "FOR MY BUSINESS" (highlighted in red), "FOR MYSELF", and "BOTH". At the bottom of the modal are "BACK" and "SETUP BUSINESS" buttons. Below the modal, a section titled "Overview Of Completed Transactions (All Time)" shows a table with columns: "Number of Transactions Processed" (0), "Total Value of Transactions Processed" (R 0.00), "Total TradeSafe Fees" (R 0.00), and "Preferred Transacting" (General Goods).

- Once you have verified your mobile number and email address, you will be asked whether you want to use TradeSafe for business, personal, or both.
- Click FOR MY BUSINESS if you do not intend using TradeSafe for personal reasons.
- Click SETUP BUSINESS

2nd Step – Setup TradeSafe Merchant Account



- Next, provide your general business details.
- Please ensure the registration number is in the format 2020/123456/07
- If you are transacting in Fuel or Precious Metals, TradeSafe will require additional documentation such as permits and/or retail or wholesale licenses.
- Confirm that you are authorised to transact on TradeSafe.
- Click NEXT to continue

2nd Step – Setup TradeSafe Merchant Account



- Insert your company bank account details
- Click SAVE BANKING DETAILS
- If your business bank account is associated with the company registration number at your bank, then the bank account details will be approved automatically.

2nd Step – Setup TradeSafe Merchant Account



Good Evening, John Doe
Today is Monday, 17 July 2023

Transacting as **A** AWESOME COMPANY (PTY) LTD

Home > Profile

Documents

Kindly upload the following documentation so that TradeSafe can verify your business. TradeSafe takes on average 2 hours to verify an organisation's business documents. We will notify you once your business account has been approved.

Letter of Authorization

We require a signed company letter stating that you are authorized to act on your company's behalf. It must be signed by someone with the authority to do so (CEO, director, head of finance or procurement, or another appropriate senior manager).

UPLOAD

CIPC Documents

We require a valid document to prove that you are legally incorporated in the Republic of South Africa. This may be a CK, COR 14.3 (or similar), or Disclosure document as issued by the Companies And Intellectual Property Commission (CIPC).

UPLOAD

This is optional for now and is not a requirement for testing. You can return at any time to complete this process when you are ready to go live.

- You can either drag or drop the documents or click on the UPLOAD button to upload the document.
- Upload a signed letter on a company letterhead confirming that the operator is authorised to transact on their company's behalf. This must be signed by someone with the requisite authority and in line with organisation's Delegation of Authority i.e., Head of Procurement, Director etc.
- Upload a CIPC 14.3, CIPC disclosure or similar document.
- TradeSafe will let you know as soon as your documents have been reviewed and once your TradeSafe business account has been approved.

3rd Step – Register Your App Or Store



tradesafe

- Dashboard
- Escrow Wallet
- Transactions
- Manage Account**
- Company Profile ✓
- Documents ✓
- Users
- Bank Account ✓
- Address
- Settings
- Integrations & Plugins**
- Create Application

Good Evening, John Doe
Today is Monday, 17 July 2023

Transacting as AWESOME COMPANY (PTY) LTD

Profile

Awesome Company (Pty) Ltd ✓

Company Type
Private Company

Legal Company Name ⓘ Trading As ⓘ
Awesome Company (Pty) Ltd Widgets By Co

Registration Number ⓘ VAT Number ⓘ
2013/170109/07 1234566789

Are you a customer, lead agent/broker, wholesaler, or supplier operating in the following industries or commodities?

Diesel, Petroleum and Lubricating Oils

Diamonds and Precious Metals (Gold, Platinum, Silver, Rhodium and Palladium)

UPDATE

Business Logo
Upload your company logo to make your profile appear more professional.

Recommended requirements:

- Square format
- At least 120 x 120
- File format: PNG, JPEG, GIF

UPLOAD

REMOVE

- Click the + button at the bottom of the menu to create an application.
- You will be granted access to the DEVELOPER PORTAL



3rd Step – Register Your App Or Store

A screenshot of the Tradesafe web application interface. The top navigation bar includes the Tradesafe logo, user information ("Good Afternoon, John Doe", "Today is Tuesday, 18 July 2023"), and links for "DOCS", "BUSINESS DASHBOARD", and "AWESOME COMPANY". A left sidebar contains navigation options: "Dashboard", "Applications", "Users", "Tools", and "Plugins". The main content area is titled "Create Application" and contains a form with the following fields: "Application Name" (filled with "My Online Store"), "Application or Website URL" (filled with "https://example.net"), and a "Create for Production" toggle switch (currently off). A red "NEXT" button is at the bottom of the form. To the right of the form is a vertical progress indicator with five steps: 1. Details (highlighted in red), 2. Logo, 3. URLs & Webhooks, 4. OAuth Config, and 5. API Keys.

- Provide basic details of your application.
- Insert the website or app's URL
- You can ignore the CREATE FOR PRODUCTION toggle. For now, we are focused on the sandbox environment.
- Click NEXT

3rd Step – Register Your App Or Store



The screenshot shows the 'Create Application' page in the TradeSafe dashboard. On the left is a dark sidebar with navigation options: Applications, Users, My awesome store (highlighted), Settings, Payment Methods, Tools, and Plugins. The main content area is white and titled 'Create Application'. It contains instructions: 'Please upload the logo that you want to display to your customers. This will be displayed on the TradeSafe payment page.' and 'The logo will also be displayed in the payment receipt and delivery confirmation email we send the customer.' Below the text is a large white box containing a logo for 'Awesome FASHION STORE'. Underneath the box are three buttons: a dark grey 'UPLOAD' button with a plus icon, a light grey 'REMOVE' button with a trash icon, and a red 'NEXT' button. On the right side of the main content area is a vertical red progress bar with five steps: 1 Details, 2 Logo (highlighted), 3 URLs & Webhooks, 4 OAuth Config, and 5 API Keys.

- Upload the logo that you want to display to your customers. This will be displayed on the TradeSafe payment page.
- The logo will also be displayed in the payment receipt and delivery confirmation email we send the customer.
- Recommended image size is 300px by 150px
- Compatible files include JPEG and PNG
- Click NEXT to continue.

3rd Step – Register Your App Or Store



Good Afternoon, John Doe
Today is Tuesday, 18 July 2023

DOCS BUSINESS DASHBOARD

Applications

Create Application

Please insert the necessary callback URLs. We have automatically generated the URLs based on the app domain you provided. If you would like to make changes, you can do so below.

If you are using an official plugin (such as WooCommerce), you can retrieve these URL's from the settings page of the plugin.

Success Page URL

Failure Page URL

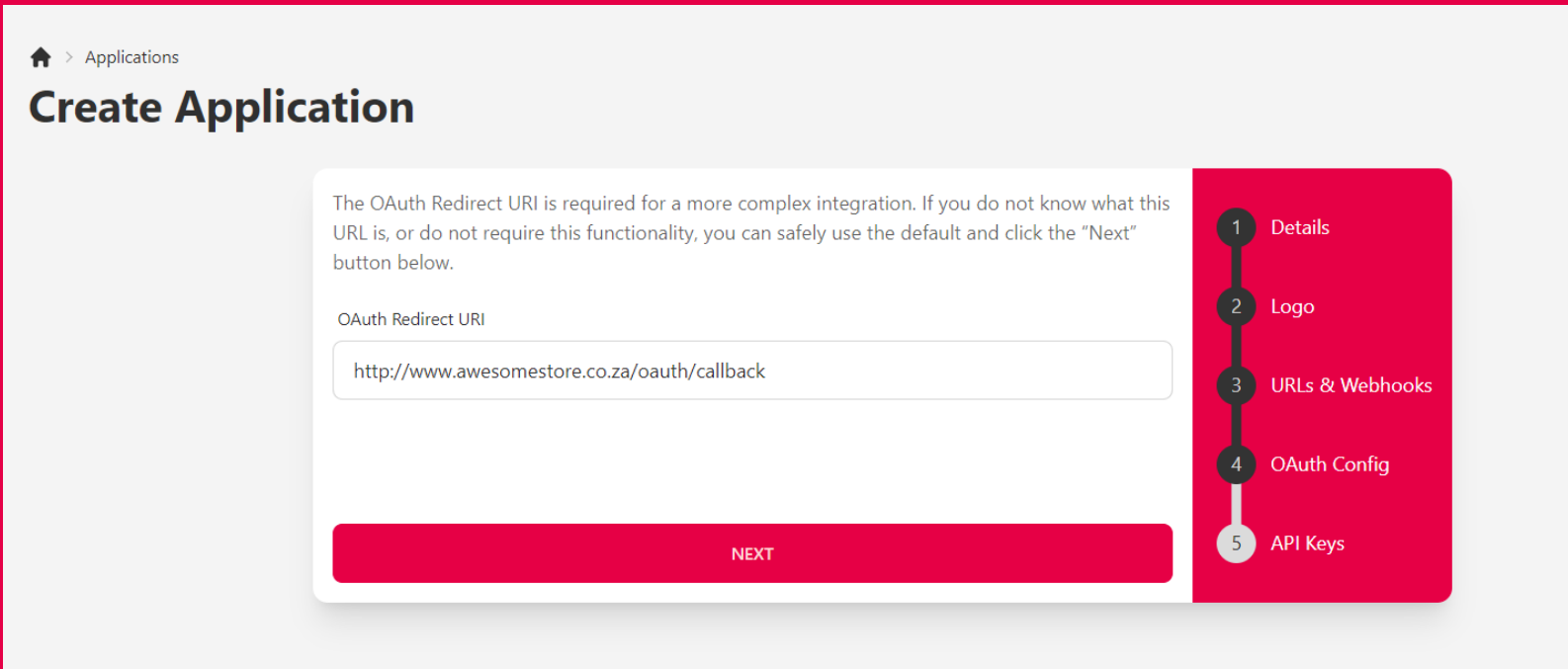
Webhook URL

NEXT

- 1 Details
- 2 Logo
- 3 URLs & Webhooks
- 4 OAuth Config
- 5 API Keys

- Please insert the Callback URLs as found on the TradeSafe plugin settings page in WordPress. The URLs are found under Callback Details
- Click NEXT to continue.

3rd Step – Register Your App Or Store



🏠 > Applications

Create Application

The OAuth Redirect URI is required for a more complex integration. If you do not know what this URL is, or do not require this functionality, you can safely use the default and click the "Next" button below.

OAuth Redirect URI

NEXT

- 1 Details
- 2 Logo
- 3 URLs & Webhooks
- 4 OAuth Config
- 5 API Keys

- OAuth Redirect URL is required for more complex integrations. You can ignore if you are doing a simple WooCommerce installation.
- Click NEXT to continue.

3rd Step – Register Your App Or Store



🏠 > Applications

Create Application

The Client ID and Secret below are required to authenticate your App with the TradeSafe API.

This information can be retrieved as needed from your App settings.

Client ID
99ace13d-3343-4511-b733-ac3a8535782e

Client Secret

[SELECT PAYMENT METHODS](#)

- 1 Details
- 2 Logo
- 3 URLs & Webhooks
- 4 OAuth Config
- 5 API Keys

Payments

Application Settings

API configuration

Client ID

Client Secret

Environment Sandbox
To access the live environment, you will need to complete the go-live process for your application

[Request Go-Live](#)

Take your store live to start processing transactions with real world currency.

- Here we provide you your **SANDBOX** Client ID and Secret.
- Insert the Client ID and Client Secret into the TradeSafe plugin settings page under Application Settings in WordPress. Your Client ID and Client Secret are different to your TradeSafe login credentials (username and password).
- If you inserted your secret Client ID and Client Secret accurately, your organisation details will show under **APPLICATION DETAILS**. If the details are not showing, an error message will be shown stating the reason why TradeSafe could not authenticate your store (its more likely that you may have inserted your Client ID and Secret incorrectly).
- Select your payment methods by clicking the button below.

3rd Step – Register Your App Or Store



Good Afternoon, John Doe
Today is Tuesday, 18 July 2023

Applications
Users
My awesome store
Settings
Payment Methods
Tools
Plugins

DOCS BUSINESS DASHBOARD

TEST CARDS

EFT

Old-school EFT is still one of the safest and cheapest way to make online payments. TradeSafe accepts EFT payments from any financial institution in South Africa.

Fee: 0.75%

Min Value: R 50.00 **Max Value:** Unlimited

InstantEFT

Ozow is an automated EFT payments processor that allows for electronic funds to be transferred inter-bank directly into a seller's bank account, in real-time.

Fee: 1.50%

Min Value: R 50.00 **Max Value:** R 2 000 000.00

Card

Ecentric is a credit-card payment processor. It accepts VISA, MasterCard, American Express and Diners Club cards. 3D Secure is enabled for each transaction.

Fee: 2.50%

Min Value: R 50.00 **Max Value:** R 25 000.00

SnapScan

SnapScan is a service that lets you make payment using your phone quickly, easily, and safely.

Fee: 3.50%

Min Value: R 50.00 **Max Value:** R 25 000.00

PayJustNow

PayJustNow is a Buy Now, Pay Later payment services provider. Buyers can get their goods upfront and make payment over 3 equal interest-free instalments.

Fee: 5.25%

Min Value: R 5 000.00 **Max Value:** R 100 000.00

- Select your preferred gateways you would like to expose to your customers.
- Please be aware of the fees and transaction value range that applies.
- You can request to improve the credit card limit to R50k. TradeSafe will review such a request.

4th Step – Go Live



Good Evening, John Doe
Today is Tuesday, 18 July 2023

DOCS BUSINESS DASHBOARD AWESOME COMPANY (PTY) LTD

Dashboard Applications Users Transactions My awesome store Settings Payment Methods Tools Plugins

Applications > Sandbox > My awesome store

Application Settings

Information shown on the checkout page

Application Name: My awesome store

Application or Website URL: http://awesomestore.co.za

Business Logo
Upload your company logo to make your profile appear more professional.
Recommended requirements:
• Rectangular format
• At least 300 x 150
• File format: PNG, JPEG, WEBP

UPLOAD REMOVE

Application Status
API Access Enabled ✓
Company Verified ✓
Bank Account Verified ✓

Request Production Access
Request production access to start transacting with real money.
GO LIVE

Guides & Documentation
• Frequently Asked Questions
• Manage Application
• Go live

URLs
Links users should be sent to

Success Page URL: https://example.net/success

- You are now good to go in sandbox.
- Access the application to review its settings.
- Once you have performed a few test transactions, you can review the transactions in the tab TRANSACTIONS in the main menu bar.
- Once you are satisfied with testing, and you are ready to go live, begin the go live process by clicking the button GO LIVE.

4th Step – Go Live



Good Evening, John Doe
Today is Tuesday, 18 July 2023

DOCS BUSINESS DASHBOARD AWESOME COMPANY (PTY) LTD

Home > Applications > Production > My awesome store

Go-Live

Request Production Access

Before you begin...

You are about to request production access for the application **My awesome store** which is owned by the organisation **Awesome Company (Pty) Ltd**. Before you begin please ensure the following steps have been completed.

1. You have tested your application end-to-end and have created multiple transactions. These transactions will be reviewed as part of your application.
2. You have downloaded, reviewed, and signed the provided Service Agreement.
3. An additional "live" demonstration may be required as part of your application.
4. The following documents will be required (if this has not already been done):
 - Signed company letterhead stating that you are authorised to act on your organisation's behalf
 - CK, COR 14.3 or CIPC disclosure document

[Download Merchant Agreement](#) [NEXT](#)

- 1 Getting Started
- 2 Company Details
- 3 Bank Account
- 4 Documents & SLA
- 5 Request Approval

- Download our merchant agreement for signature. You will be required to upload it to enable your production account.
- Review the instructions and click NEXT.

4th Step – Go Live

🏠 > Applications > Production > My awesome store

Go-Live

Company Details

Company Type

Private Company

Legal Company Name ⓘ Trading As ⓘ

Awesome Company (Pty) Ltd Widgets By Co

Registration Number ⓘ VAT Number ⓘ

2013/170109/07 1234566789

Payout To

Bank Account

Payout Frequency

Immediate

BACK UPDATE COMPANY DETAILS

- 1 Getting Started
- 2 Company Details
- 3 Bank Account
- 4 Documents & SLA
- 5 Request Approval

- Review your company details. If you did not do this at the beginning when adding your organisation, you will need to supply the necessary details.
- Ensure all information is true and correct.
- Specify where TradeSafe must pay the funds, and how often. We can make payment to your escrow wallet or your bank account.
- Click UPDATE COMPANY DETAILS.

4th Step – Go Live



🏠 > Applications > Production > My awesome store

Go-Live

Bank Account

Bank

Standard Bank South Africa

Account Number: 2960060

Account Type: Cheque/Current Account

[BACK](#) [UPDATE BANKING DETAILS](#)

- 1 Getting Started
- 2 Company Details
- 3 Bank Account
- 4 Documents & SLA
- 5 Request Approval

- Confirm your bank account details.
- Please ensure the bank account details are correct. We perform Account Verification Services to determine whether your bank account belongs to your organisation at your bank.
- Click UPDATE BANKING DETAILS.

4th Step – Go Live



Good Evening, John Doe
Today is Tuesday, 18 July 2023

DOCS BUSINESS DASHBOARD



Home > Applications > Production > My awesome store

Go-Live

Company Documents

Letter of Authorization

We require a signed company letter stating that you are authorized to act on your company's behalf. It must be signed by someone with the authority to do so (CEO, director, head of finance or procurement, or another appropriate senior manager).

 Resolution Letter.pdf  DELETE

CIPC Documents

We require a valid document to prove that you are legally incorporated in the Republic of South Africa. This may be a CK, COR 14.3 (or similar), or Disclosure document as issued by the Companies And Intellectual Property Commission (CIPC).

 CIPC14.3.pdf  DELETE

Service Agreement

Signed copy of the TradeSafe service agreement.

 Merchant Agreement.pdf  DELETE

BACK

REQUEST GO-LIVE APPROVAL

- 1 Getting Started
- 2 Company Details
- 3 Bank Account
- 4 Documents & SLA
- 5 Request Approval

- Upload your company documents if you have not done so already.
- Upload the signed merchant agreement.
- Click REQUEST GO-LIVE APPROVAL.

4th Step – Go Live



Hello John,

We are thrilled to inform you that your TradeSafe application has been approved. Your merchant account is now live and are ready to accept real money transactions.

The application name that has been approved is **My awesome store.**

Your approved merchant account will provide peace of mind to your customers. Our robust escrow system and transparent payment processes instils trust in every transaction. Customers can rest assured knowing their funds are protected until the successful completion of the transaction, resulting in increased satisfaction and improved sales conversions.

Thank you for choosing TradeSafe as your trusted partner for secure transactions. We are confident that your business will flourish, and we are here to support you every step of the way.

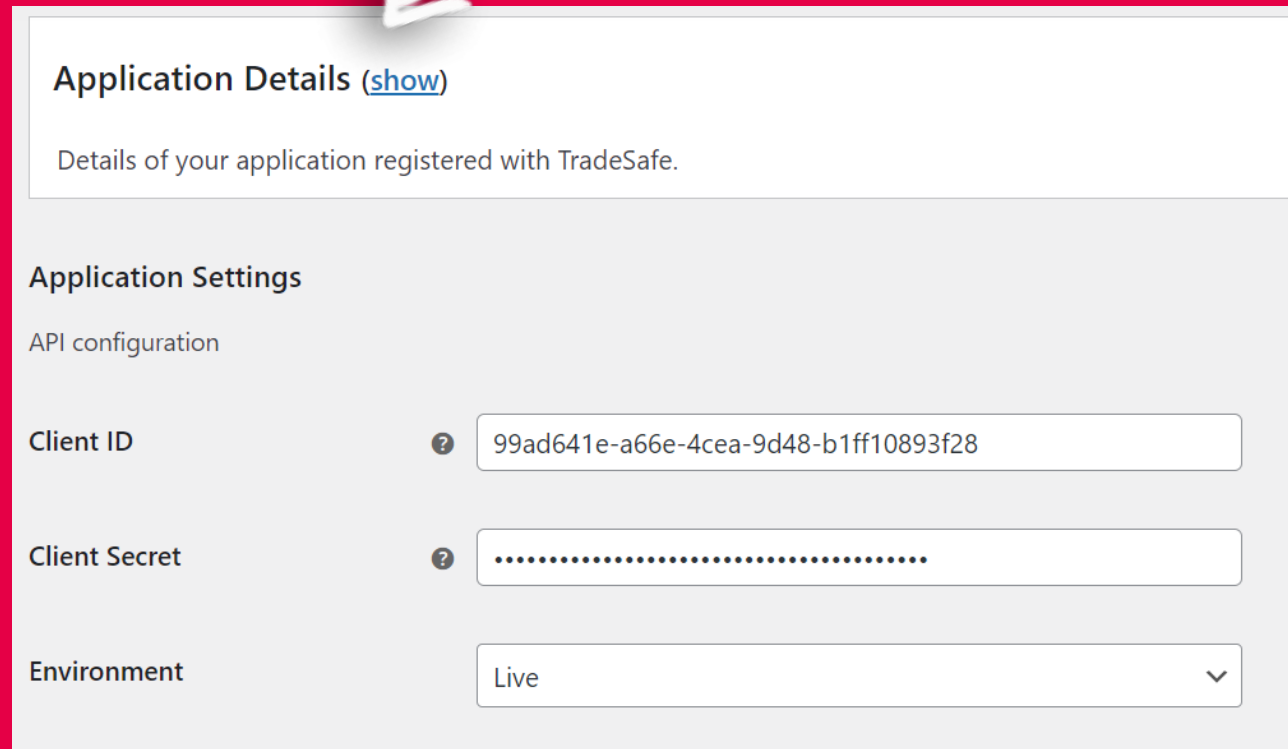
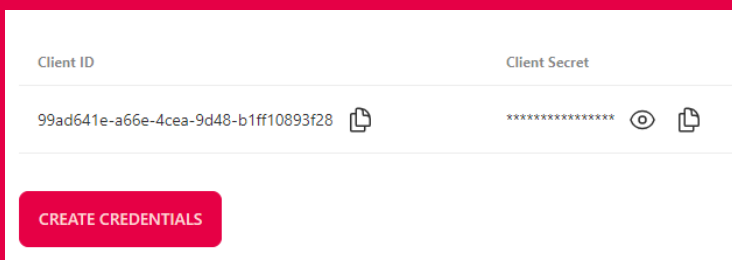
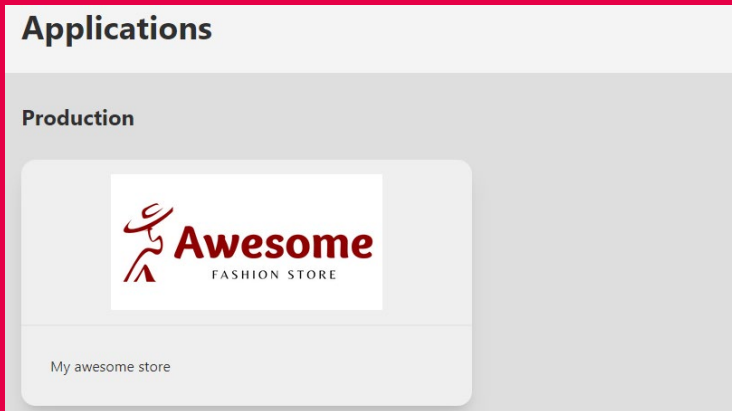
To the moon

Team TradeSafe

- TradeSafe will then review your go-live request and will let you know as soon as your production account has been activated.

4th Step – Go Live (FINAL STEP)

- The very last step is for you to insert the production keys into WordPress. Access the application under production on TradeSafe and copy and paste the Client ID and Secret from the bottom of the application page to WordPress. **You may need to refresh your page to ensure the production keys are showing**
- Scroll to environment. Select the option **LIVE from SANDBOX**. Click **SAVE CHANGES**.
- If the **APPLICATION DETAILS** shows your organisational information, then that means you have successfully authenticated with TradeSafe in production mode. If not, then that means the production Client ID and Secret have been inserted incorrectly.
- Your store is now ready to transact live with real funds.
- **You are now good to go!**



TradeSafe's Logo Assets

Our official logo assets available for download.
There are three versions of the logo available to download.



Logo with the tag
'assuring buyer & seller security'

Download now



TradeSafe logo assets without buyer seller
security tagline

Download now



TradeSafe logo assets with management
oversight by Standard Bank.

Download now

Learn More Banners

Download our "Learn More Banners" to promote TradeSafe's banked-backed escrow
payment technology.

Shop with confidence

Pay with TradeSafe and get what you paid for, every time.

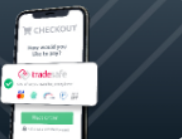
- 1 Pay securely with TradeSafe
- 2 Confirm that your order was delivered
- 3 We release the funds



Shop with confidence

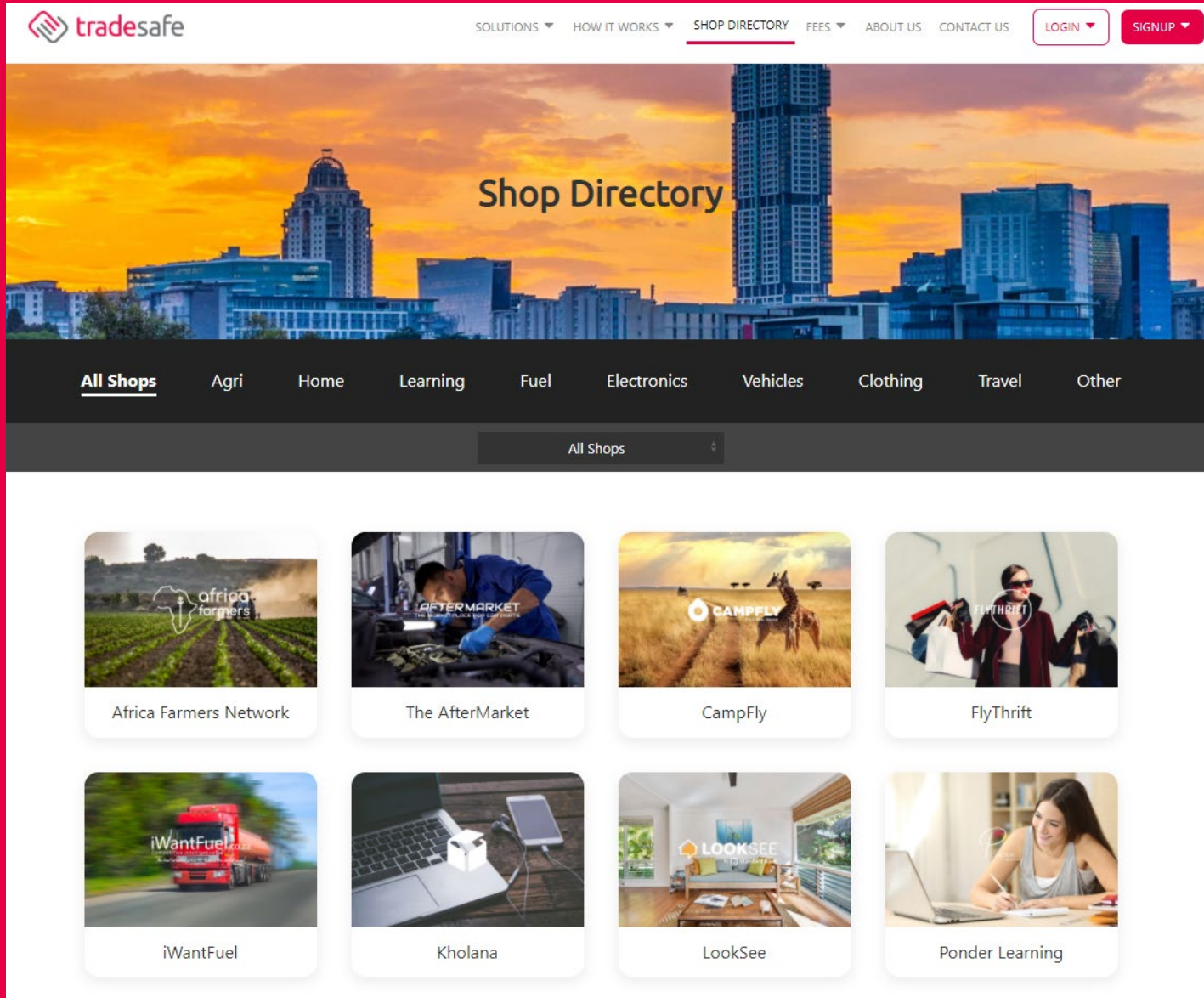
Pay with TradeSafe and get what you paid for, every time.

- 1 Pay securely with TradeSafe
- 2 Confirm that your order was delivered
- 3 We release the funds



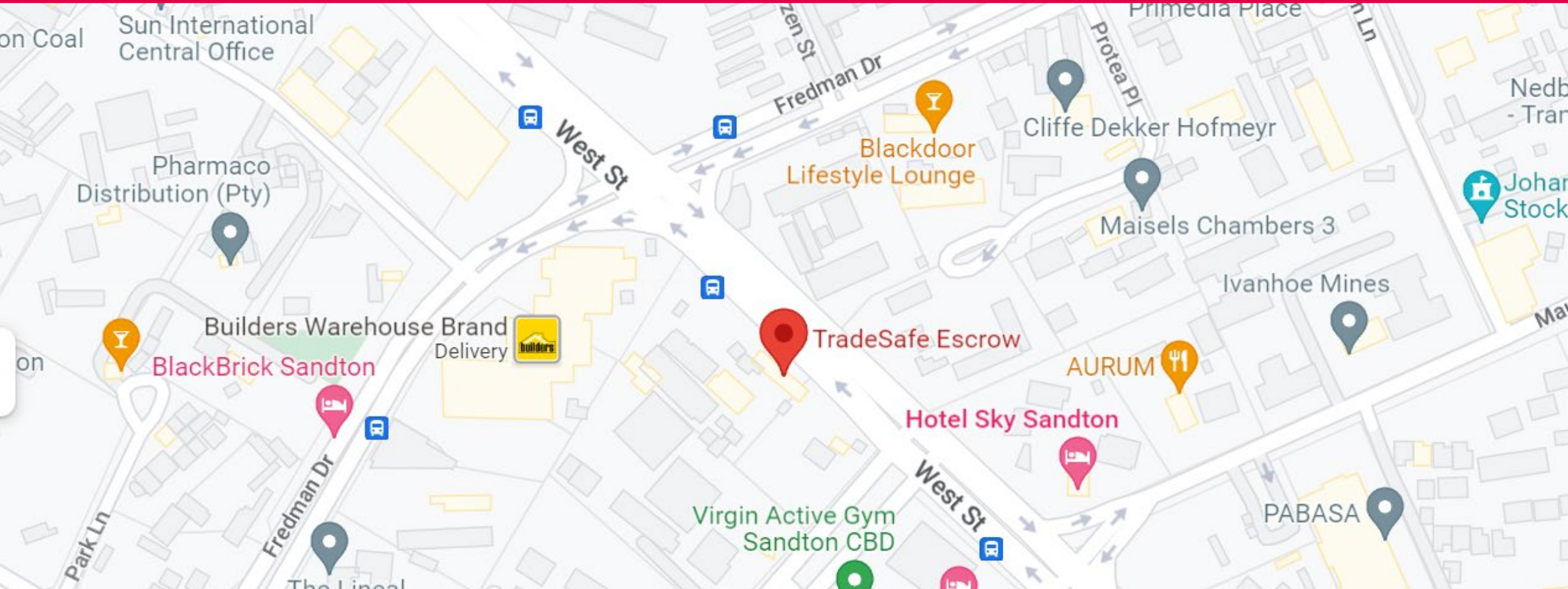
- Have a look to see what TradeSafe brand assets you can include on your store [Brand Resources | TradeSafe Escrow](#)
- How it works and social media assets are also available on our Brand Resource page.

We Will Add You to Our Shop Directory



- This will drive brand awareness of your digital store and ultimately drive more traffic to your website.

Robust, Seamless, Secure



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Sandown,
Johannesburg,
2196



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support@tradesafe.co.za



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[TradeSafeZa](https://www.facebook.com/TradeSafeZa)



[TradeSafe Escrow](https://www.youtube.com/TradeSafeEscrow)



[TradeSafe Escrow](https://www.linkedin.com/TradeSafeEscrow)