GOCARDLESS

GoCardless Partner Portal: How-to Guide

GoCardless
Partners

Introduction

Welcome to the GoCardless Partner Portal.
This guide will help you navigate the portal so that you can build a best in class integration, launch it to your users and grow our partnership.

Contents

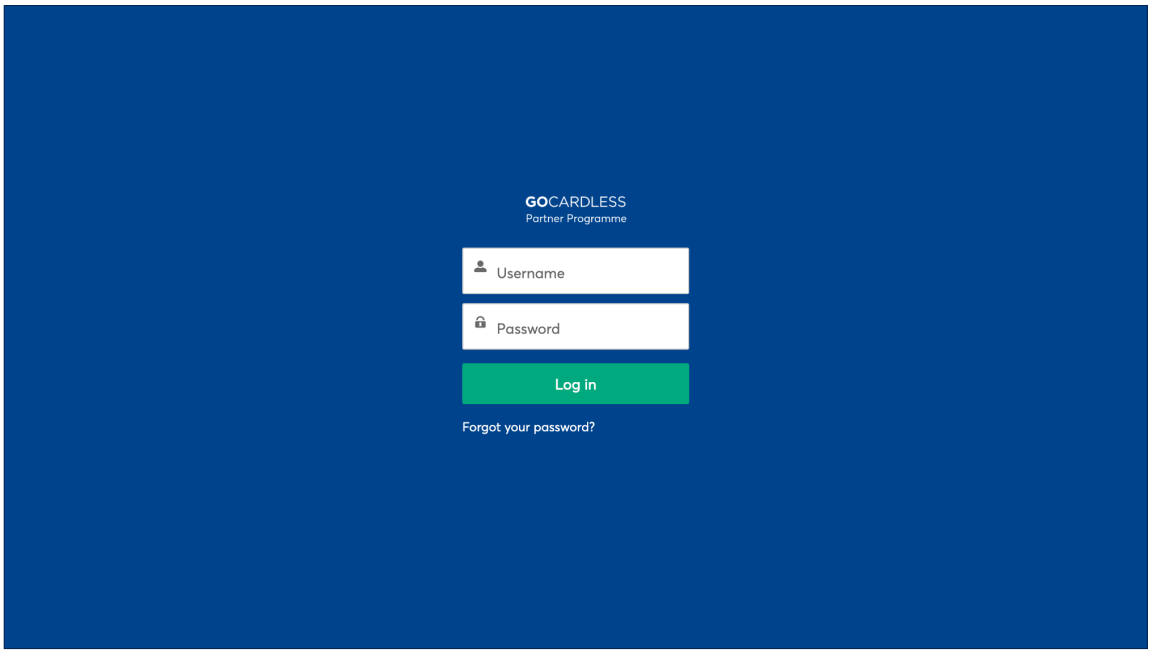
04	How to access the GoCardless Partner Portal
06	My Account information
08	Building your GoCardless partner integration
14	Launching your GoCardless partner integration
16	Growing your GoCardless partner integration
19	FAQs

Section 1

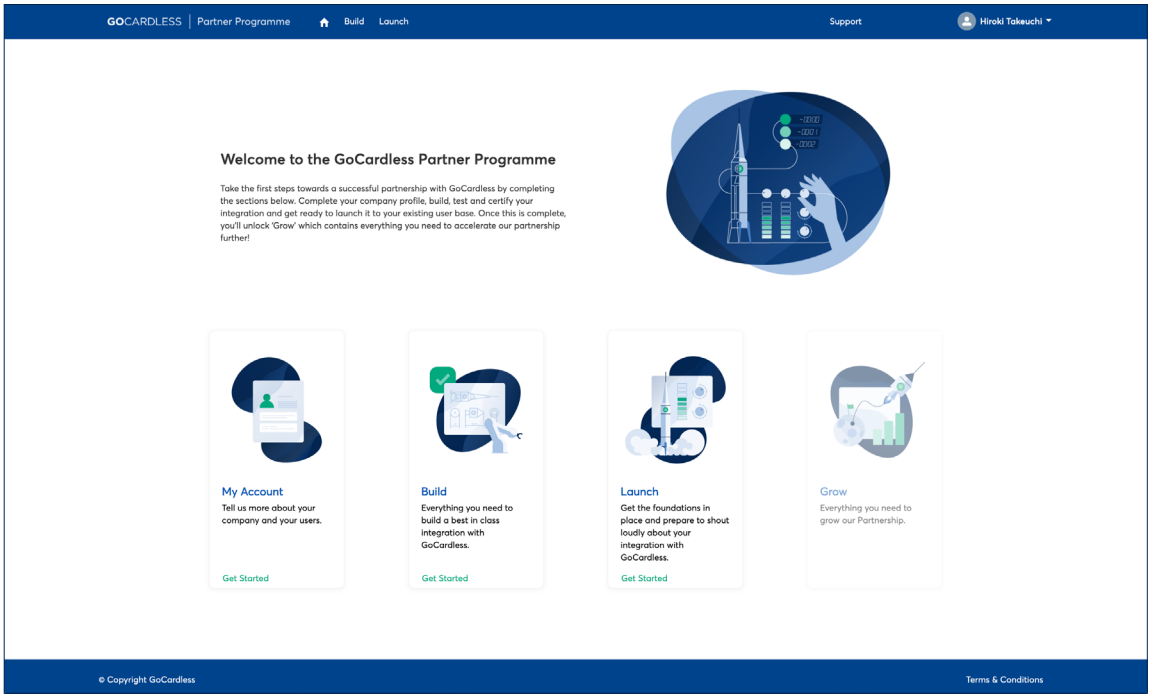
How to access the GoCardless Partner Portal

You can register your interest in joining the GoCardless Partner Programme and for a Portal account here: gocardless.com/partner-with-us.

Once you have registered your details you'll be invited to create your account and login for the first time. You can navigate to the login page at any point by visiting gocardlessportal.force.com.



The GoCardless Partner Portal is made up of four distinct areas: '**My Account**', '**Build**', '**Launch**' and '**Grow**'.



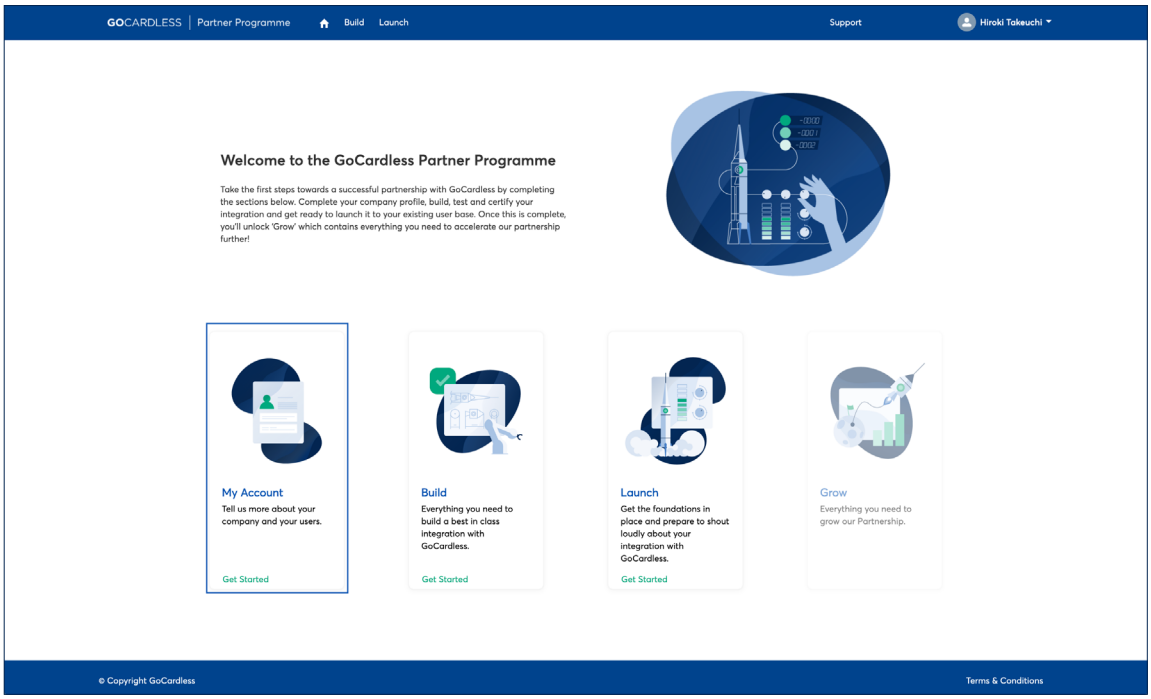
When logging into the portal for the first time you will be able to access each area except for '**Grow**'. This will be unlocked once you complete the first three areas.

Section 2

My Account Information

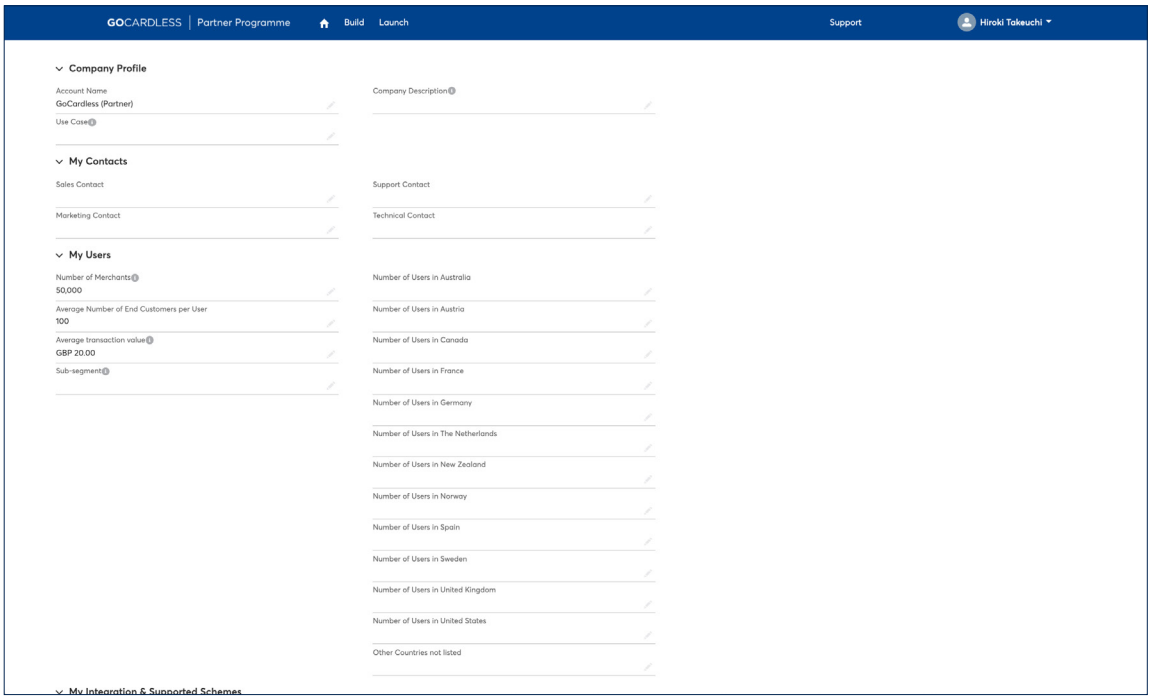
The '**My Account**' area allows you to tell us a bit more about your product and your users. Providing this information ensures we can surface the most relevant content and updates making everything you need easy to find.

Click on the "**Get Started**" button to access this area of the portal.

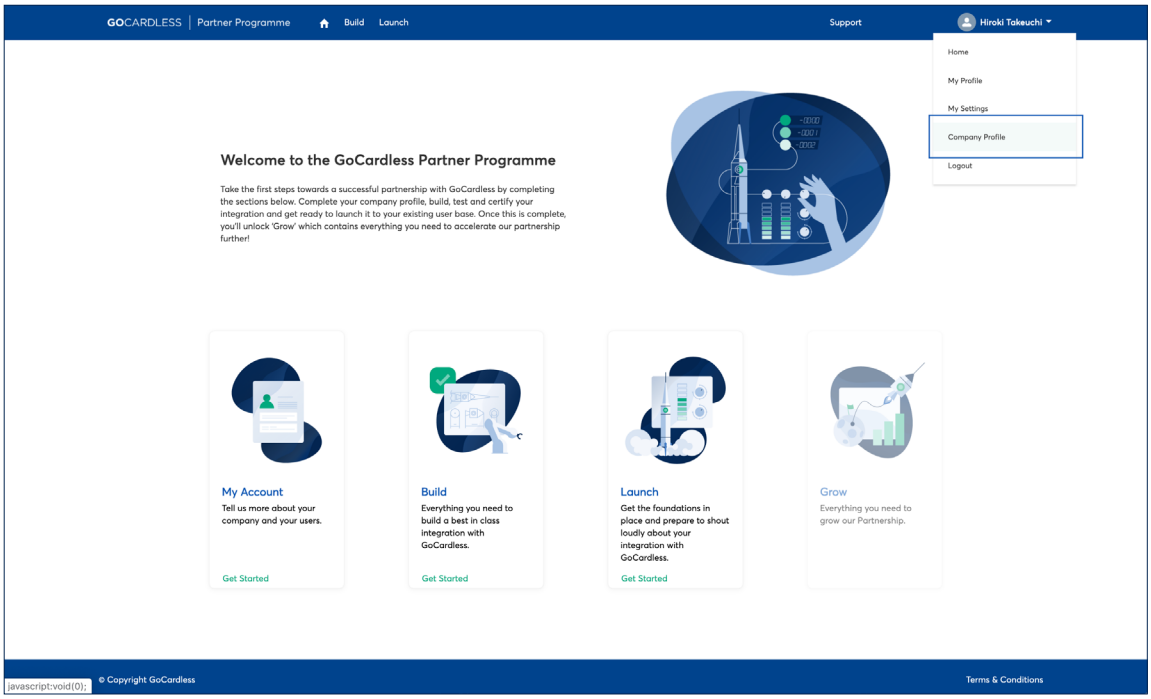


Here, you will be prompted to add a description of your platform. We will also ask you to add relevant contacts to your account and provide information on your users and the schemes (regions) that your integration will cover.

Note – you will need to complete the information in the **'My Account'** section in order to submit your integration for review (see section 3).



If you need to edit any of your account information or add new information in the future, then you can do so by clicking into '**Company Profile**' from the dropdown menu under your profile name.

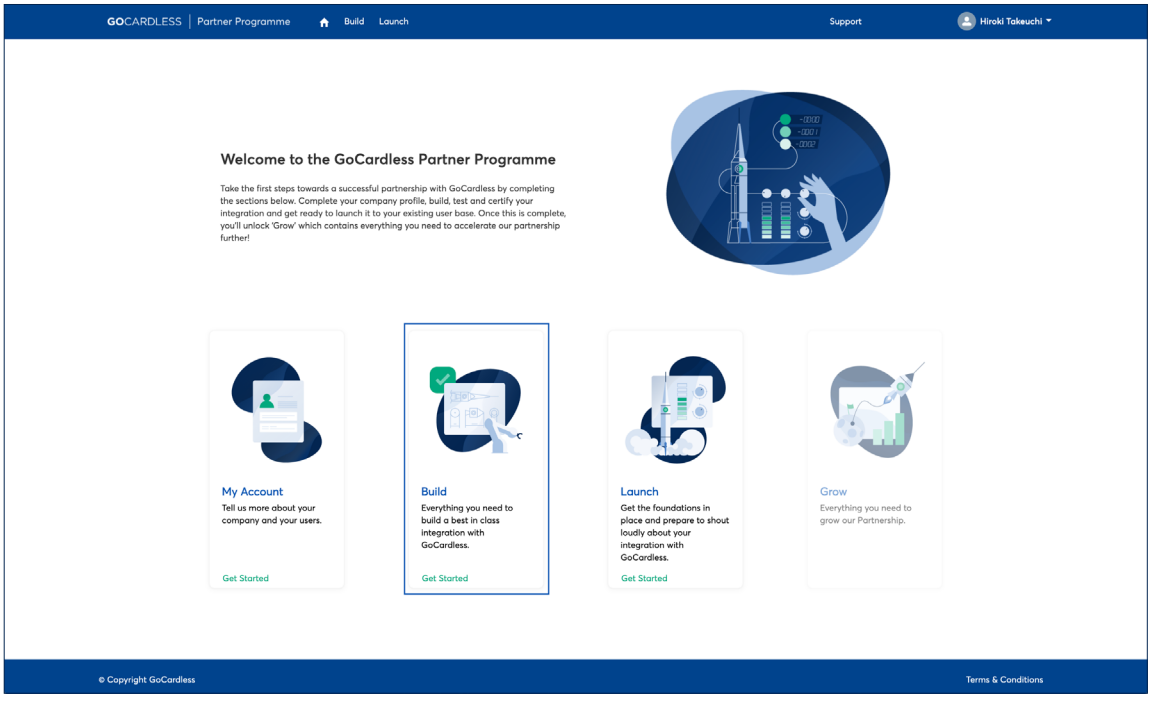


Section 3

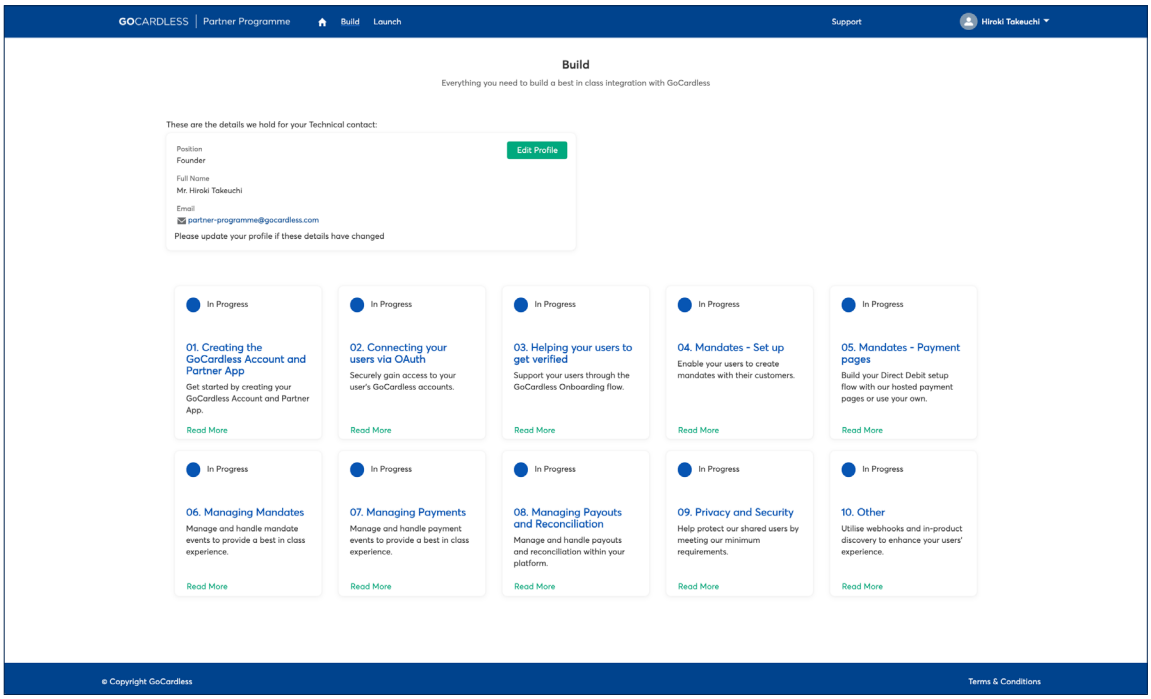
Building your GoCardless partner integration

The **Build** area of the portal guides you through each step required to complete technical certification and build a best in class partner integration with GoCardless. You can read about technical certification and our requirements here.

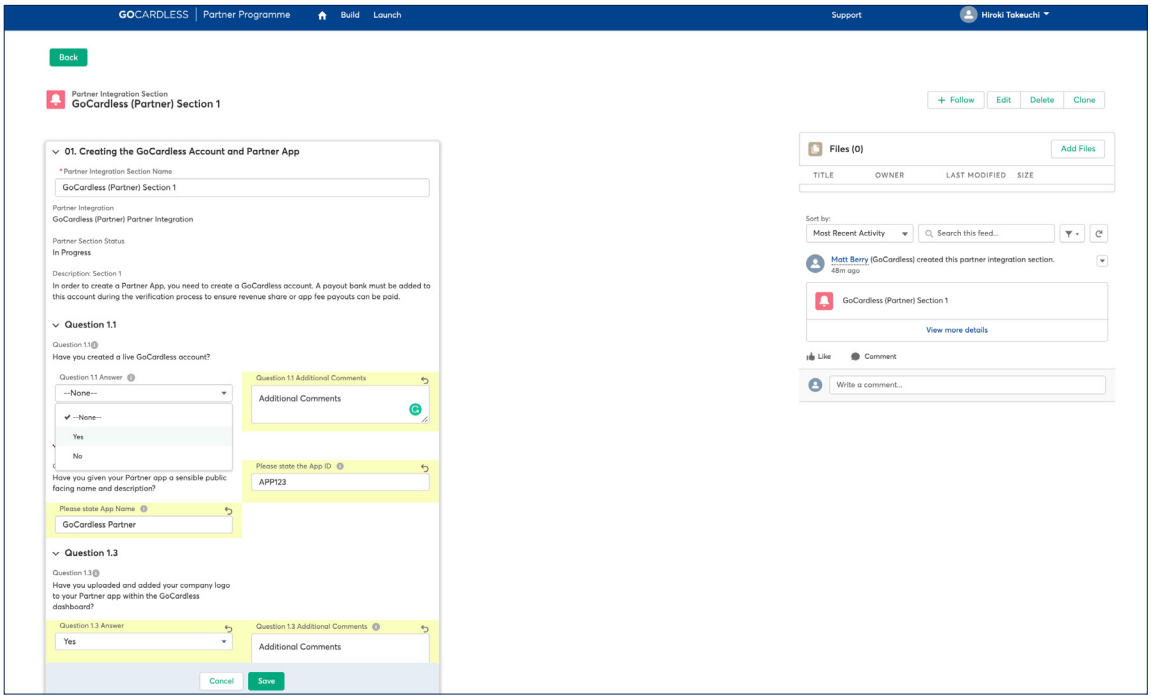
You can access the **Build** area by clicking Get Started.



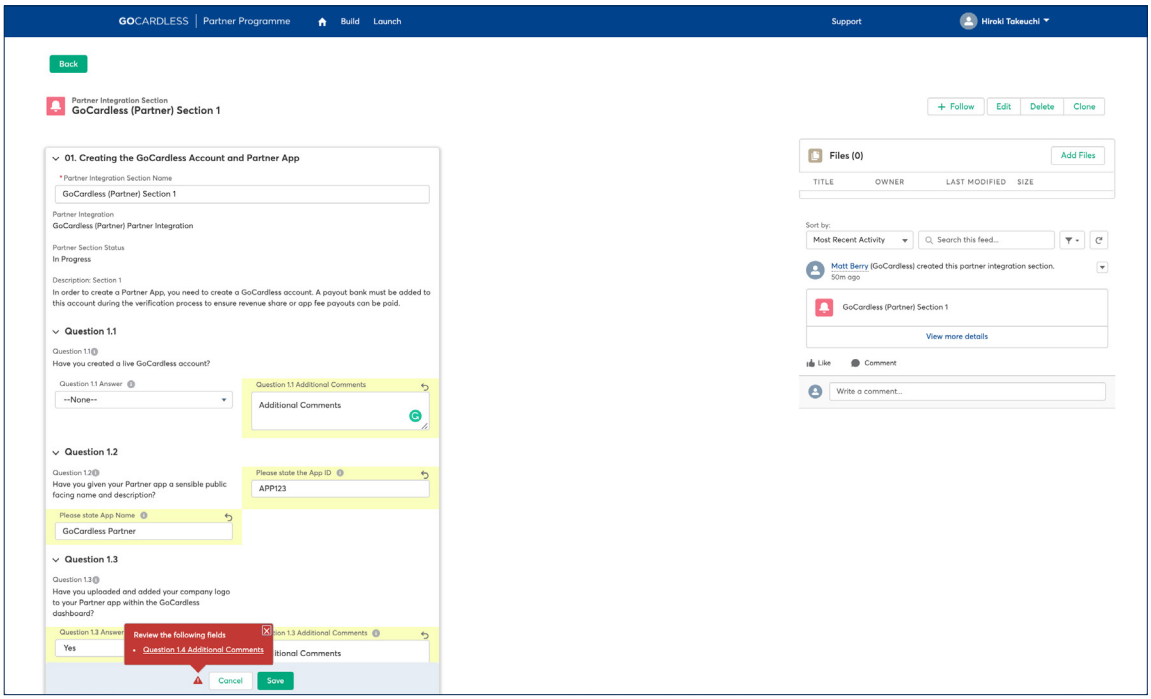
We've broken down our certification and build requirements into ten easy to follow sections made up of a series of mandatory questions. To begin editing an individual section click '**Read more**'.



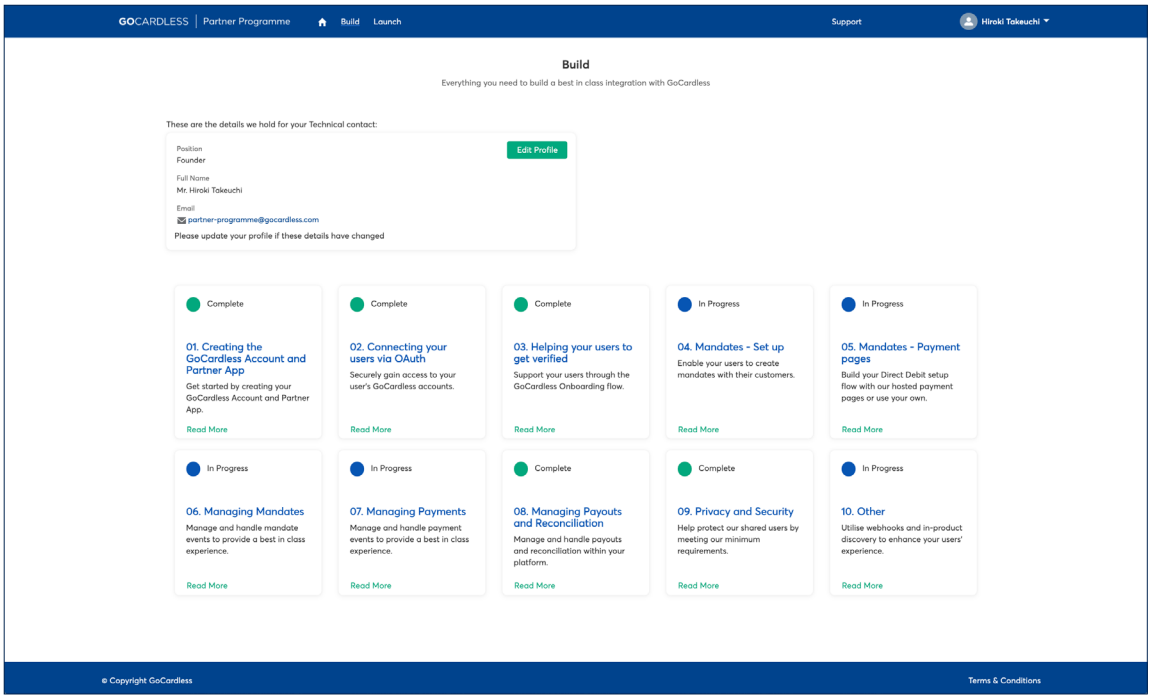
Within each section, you'll be presented with a series of questions that must be answered in order to complete the section. You may be required to provide additional comments or upload screenshots to support your answers. Screenshots can be uploaded using the '**Files**' tool on the right hand side of the page.



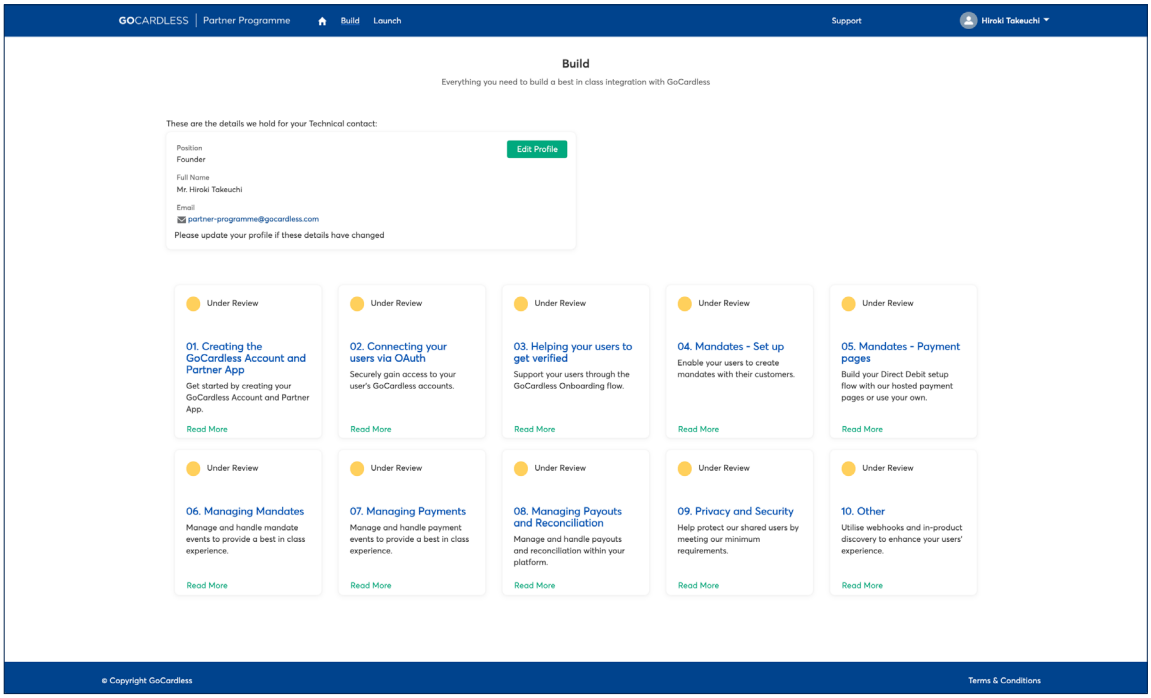
You can save your progress within an individual section at any point. However, if you have failed to provide a response in a mandatory field you'll be prompted to do so. An error message will specify which questions need to be completed - simply click on the message to jump to the relevant question.



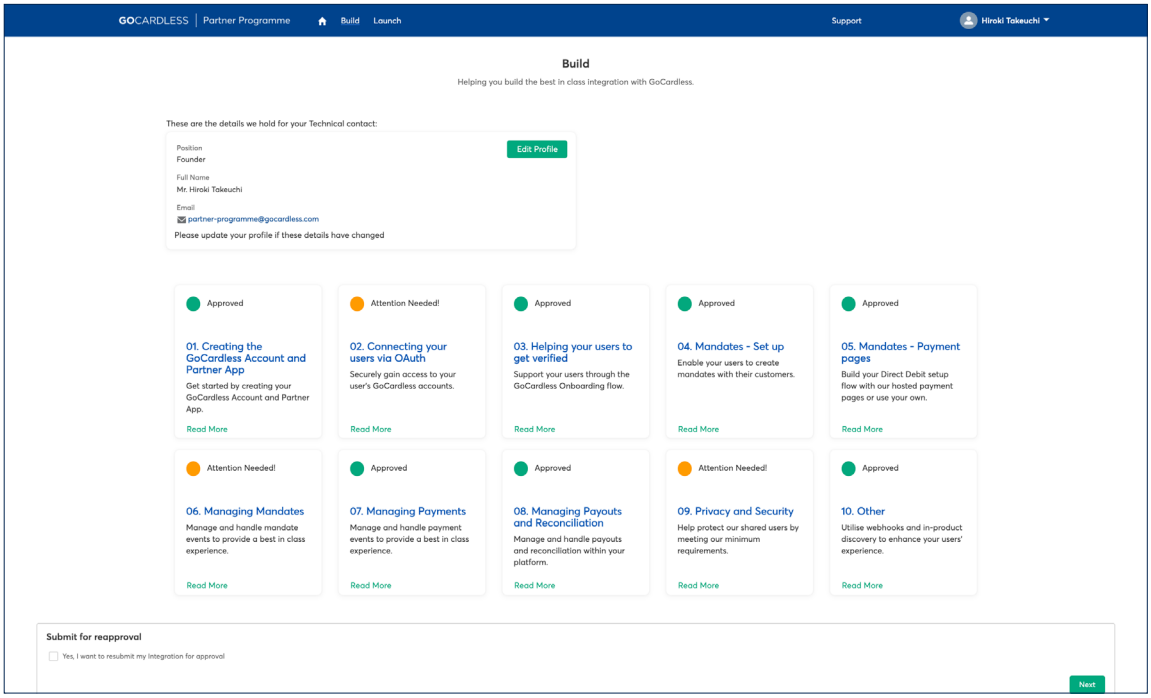
The overall status of each individual build section will be reflected on the **Build** tiles, allowing you to easily track your progress against our requirements.

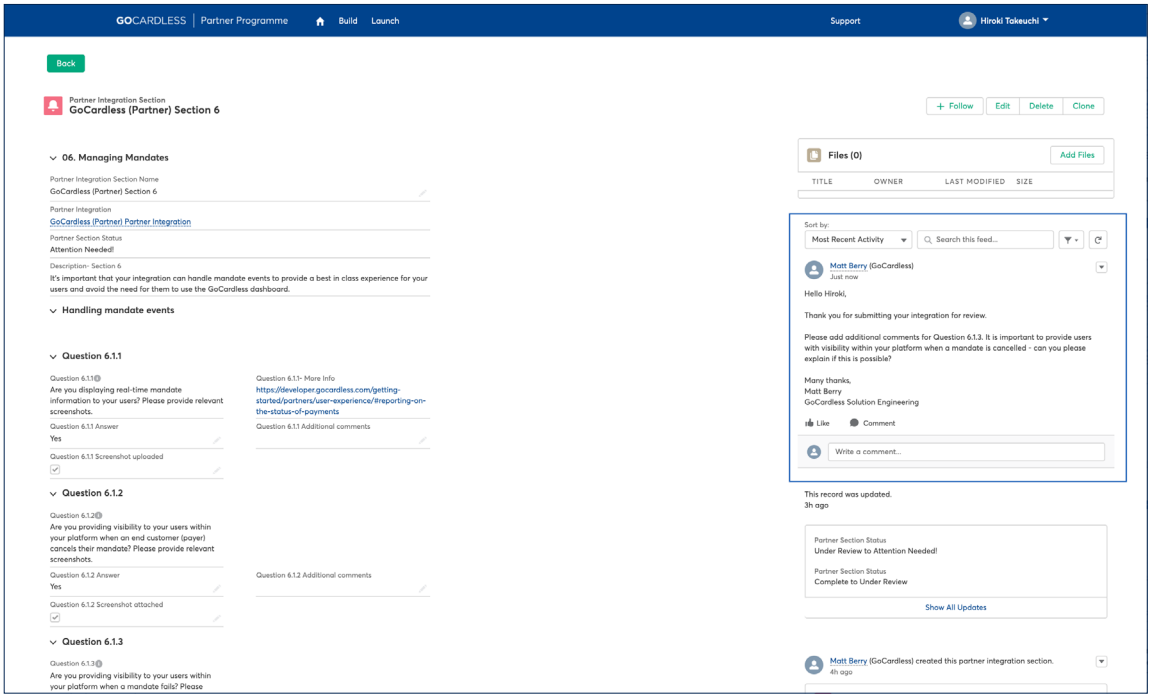


Once you have completed all ten **Build** sections your integration will be automatically submitted to our Solutions Engineers for review. The status of each section will be updated to '**Under Review**' to reflect this.

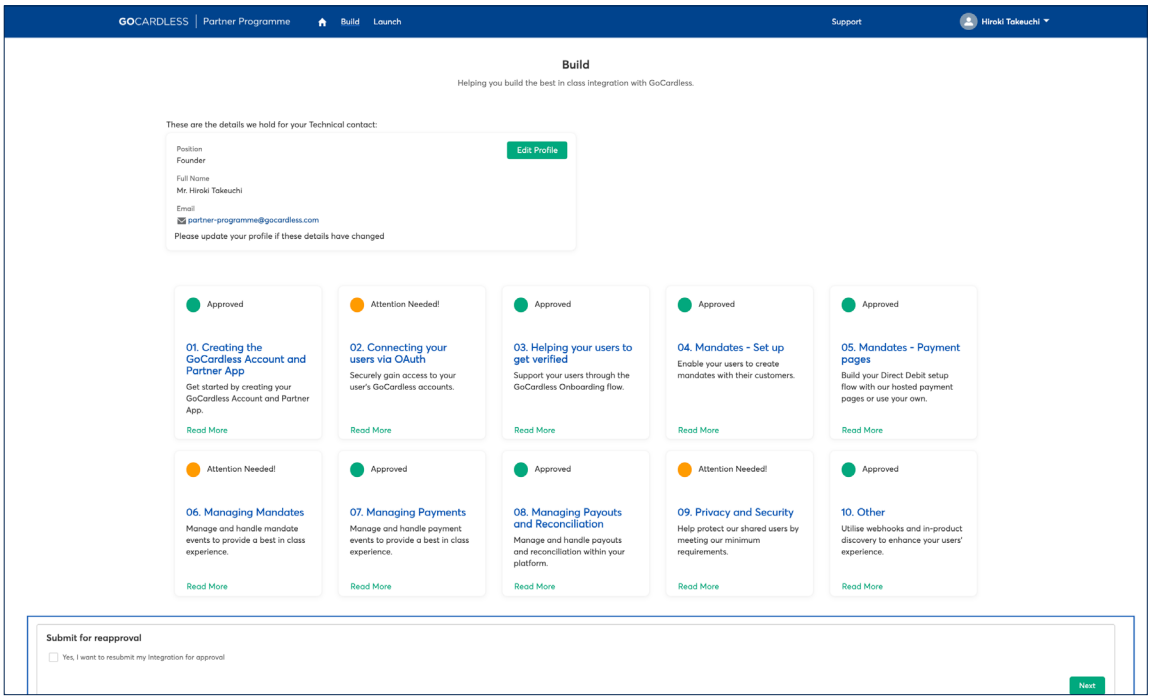


Once our Solutions Engineers have reviewed the answers you have submitted, they will provide you with feedback. You will be notified at this point and can view the feedback by logging into the Portal and selecting any sections that have the status '**Attention Needed**'.

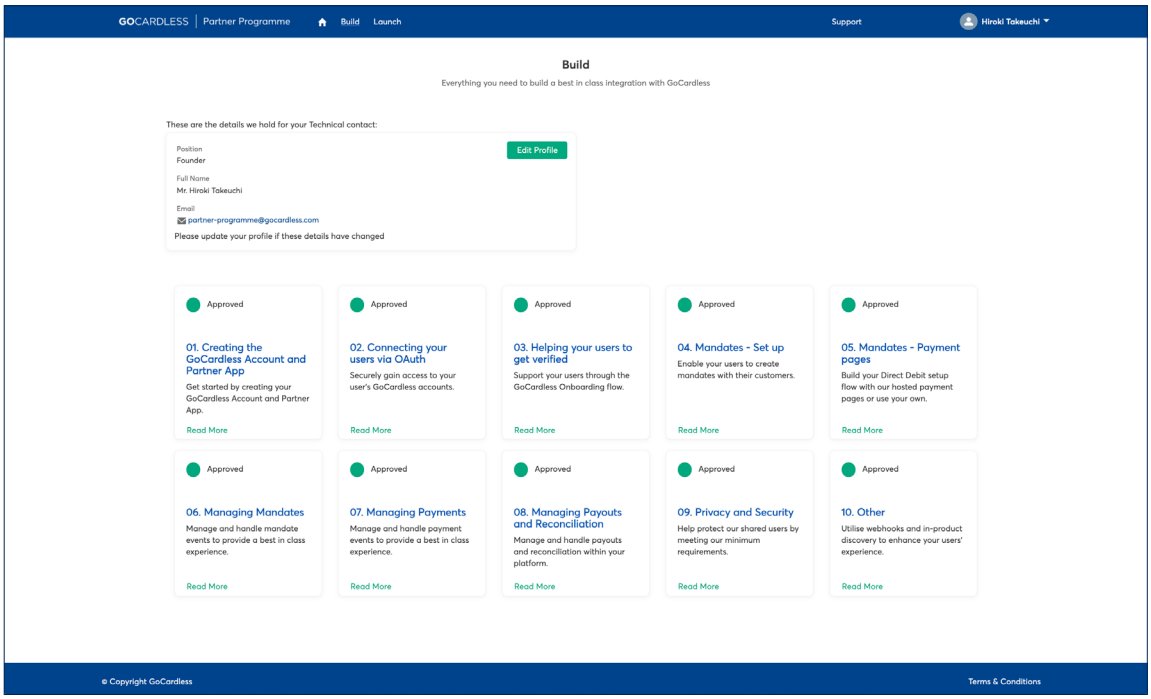




Feedback will appear in the chatter feed on the right side of the page. Once you have addressed this feedback by providing additional commentary and/or uploading additional screenshots you will be able to re-submit your answers for review.



Once each section has been approved by our team your integration will be technically certified and set live! The status of each section will be updated to '**Approved**" to reflect this.



If you have any support issues while building your integration then you can submit a support ticket by clicking on '**Support**' in the header. Select '**New**' to submit a support case to the GoCardless team.

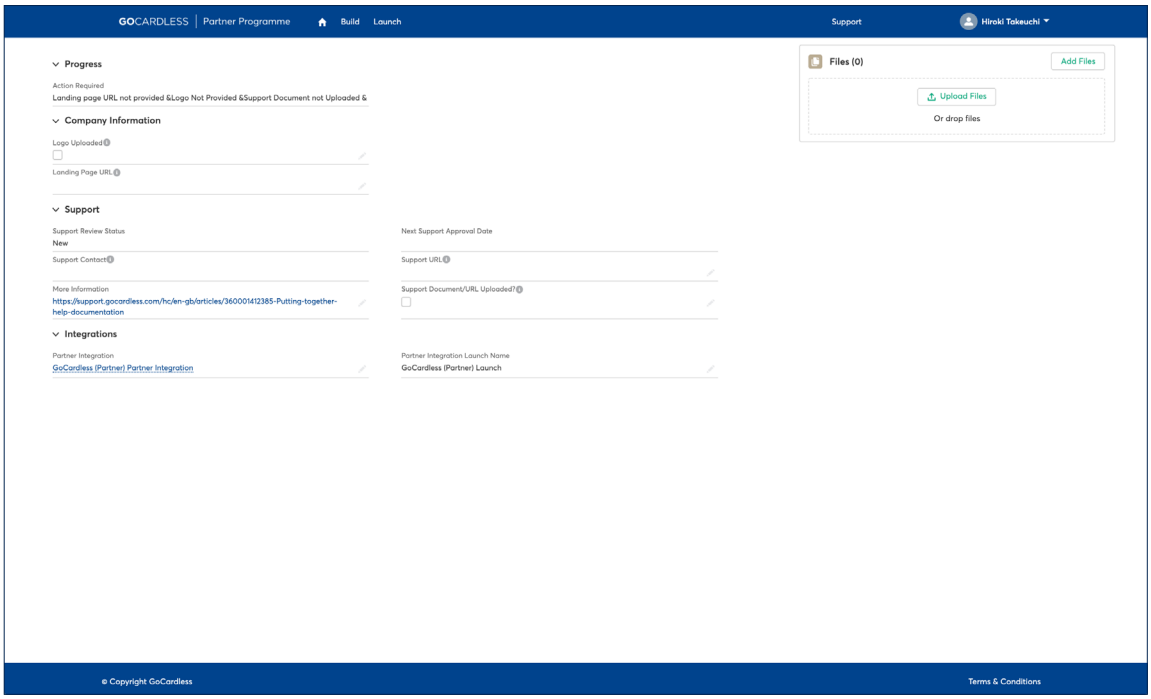
Support cases should only be raised for issues concerning your partnership (e.g. commercials, integration questions etc.). If your users have an issue with their GoCardless account they can contact our support team directly at help@gocardless.com.

Section 4

Launching your GoCardless partner integration

Once you have submitted your integration for review, you can use the '**Launch**' area of the portal to put the foundations in place for a successful integration launch.

You'll need to provide both a high-resolution logo and a URL link to a relevant landing page on your website. This will allow us to promote your integration on our partner directory.



In addition to having a certified integration, we need to ensure your users know how to get the most out of it. As a result, we require all partners to produce support documentation that clearly explains how their integration works.

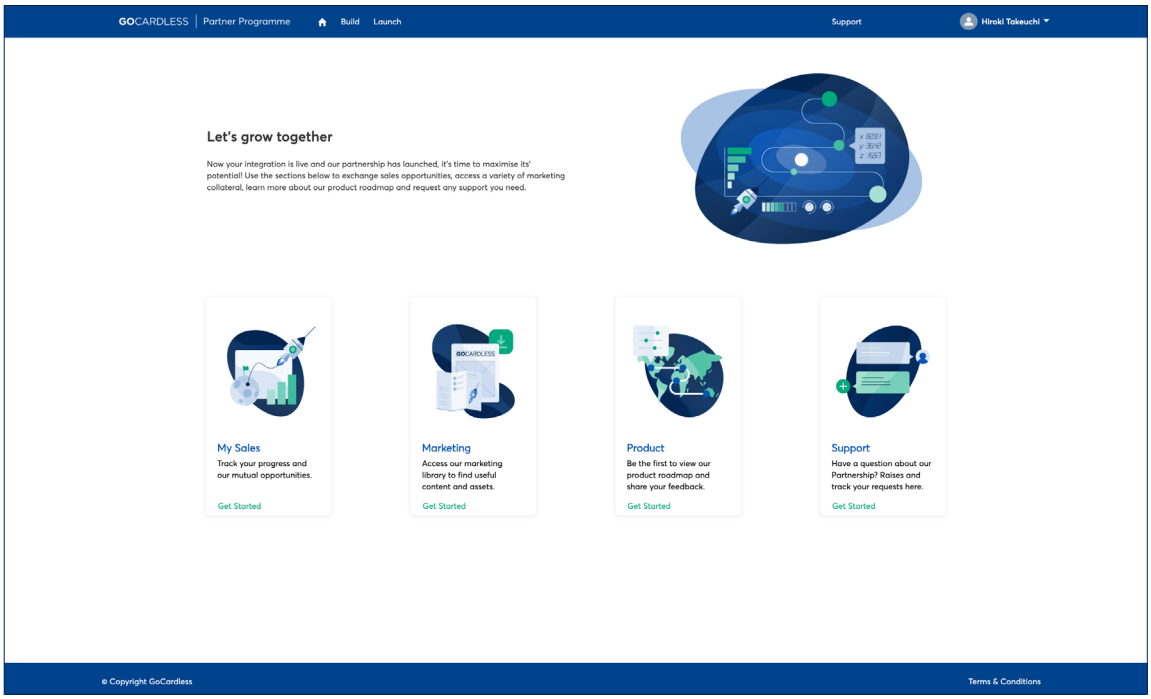
You can upload a copy of, or link to, support documentation in this section of the portal. You'll also find a link to helpful guidance on producing 'best in class' how-to documentation.

Section 5

Growing your GoCardless partner integration

Now that you have built a technically certified integration and put the foundations in place for launching it to your users, you'll be able to access the '**Grow**' section of the portal.

The **Grow** section of the portal has been designed to provide you with all of the tools and content needed to maximise your partnership with GoCardless.



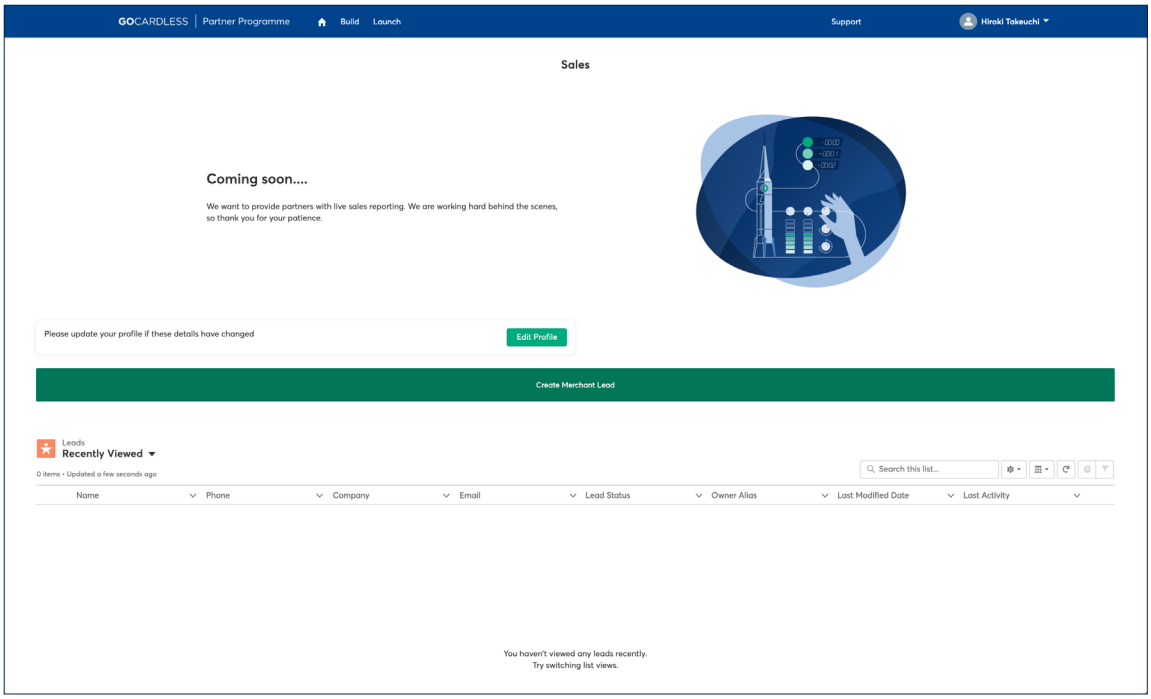
Within the **Marketing** section you will find lots of useful content to help promote your integration with GoCardless, educate your users about the benefits as well as a variety of guides and FAQs.

You'll find updates on our product roadmap, developer documentation and updates from our engineering team within the **Product** section.

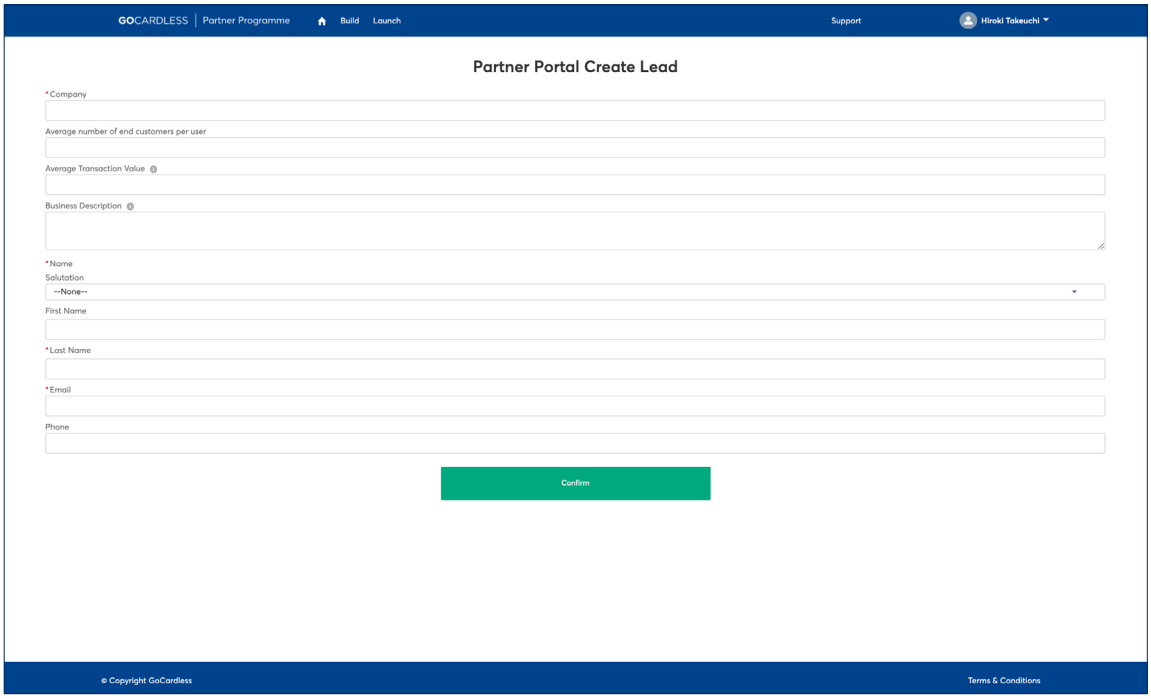
You can create new support cases and track existing queries from the **Support** section.

Finally, you can create and track mutual opportunities from within the **My Sales** area.

Click on **Create Merchant Lead** to record a mutual opportunity.



You'll be prompted to add further information including contact details, business description and size of the opportunity. Once submitted a member of our sales team will reach out to the user and provide regular updates.



Section 6

FAQs

How do I access the GoCardless partner portal?

You can register your interest in joining the GoCardless Partner Programme and for a Portal account here: gocardless.com/partner-with-us. Once you have registered your details you'll be issued with a username and invited to create your account and login for the first time. You can navigate to the login page at any point by visiting gocardlessportal.force.com.

What happens if I forget my username/password?

Your username will be provided via email when you first register your interest in joining the GoCardless Partner Programme. If you need to request a reminder you can do so by emailing partner-programme@gocardless.com. If you forget your password you can reset this by selecting the '**Forgot your password**' option on the portal login screen.

Can I register multiple users on my account?

Yes. You can add relevant contacts in the My Account section of the portal. If you'd like one of these contacts to be able to access your account with their own login details simply raise a support case requesting this.

What happens if I have a question during the Build phase?

The Build area of the portal guides you through each step required to complete technical certification and build a best in class integration with GoCardless. You can read about technical certification and our requirements here. You can also find lots of useful information in our developer documentation here: developer.gocardless.com/getting-started/partners/introduction. If you need to raise a specific question during the build process you can do so by raising a support case.

How quickly will I receive feedback on my integration submission?

We aim to provide feedback within five working days of submission.

How will I know I have received feedback on my integration submission?

Once we have provided feedback you will receive an email notification. Simply login to the Portal to view and respond to any feedback.

Why is the 'Grow' section of the Partner Portal locked?

The '**Grow**' Section remains locked until '**My Account**', '**Build**' and '**Launch**' sections have been completed.

I have another question. How do I contact the team?

If you have created a portal account you can raise a support case using the 'Support' button in the header. You can also reach out to the team at partner-programme@gocardless.com

GOCARDLESS