

GOCARDLESS

Creating 'how to' support documentation for Partner integrations



GoCardless requires all partners to write documentation that clearly explains how their integration works. This is a requirement in order for a partner app to go live, plus it ensures that users have the right information in order to get the most out of the integration.

We've outlined below some guidance to help our partners write best-in-class 'how to' documentation.

Get the structure right

It's important for 'how to' documentation to cover the full user journey, including any exceptions. We typically recommend the following structure:

Getting started

- Where to find GoCardless in your product or marketplace
- Creating a GoCardless account
- Connecting an existing GoCardless account
- Getting verified (see our help articles [here](#))
- Selecting your GoCardless package (see our help articles on [Plus](#) and [Pro](#))
- Which currencies (schemes) you support through GoCardless
- How to complete any settings specific to your integration, e.g. nominal code for GoCardless fees

Setting up mandates

- How to set up customers with Direct Debit mandates
- How to encourage your customers to get paid by Direct Debit (see our guide [here](#))
- Moving from using the GoCardless dashboard to your integration (if relevant) and matching any existing mandates with customer records
- Moving existing Direct Debit mandates to GoCardless (see our help article [here](#))
- Handling mandate cancellations
- How to de-link a mandate from a customer record if your user makes a mistake

Collecting payments

- How to collect payments by Direct Debit automatically (using the same mandate, including variable amounts and frequency)
 - Repeat payments
 - Variable or one-off payments
- How payment timings work (see our help article [here](#))
- Handling payment failures and retries
- Handling chargebacks and late failures
- Handling refunds (where relevant)

Reconciliation

- Marking invoices as paid
- Matching GoCardless payouts to bank feeds (if relevant)

Include lots of images

Images and screenshots are really helpful to bring a process to life. Include as many as possible!

Where you include screenshots showing your customers what to click on, ensure you take a screenshot of the full page and include arrows so your customers know where to look.

Make a video guide

Videos are a great way to go beyond simple images and show a process to users. And you don't need expensive software or expert producers to make a great explainer video.

Check out these tools to build a low-cost but high-class 'how to' video:

[Recordit.co](https://www.recordit.co/)

[telestream.net/screenflow](https://www.telestream.net/screenflow/)

[syniumsoftware.com/screenium](https://www.syniumsoftware.com/screenium)

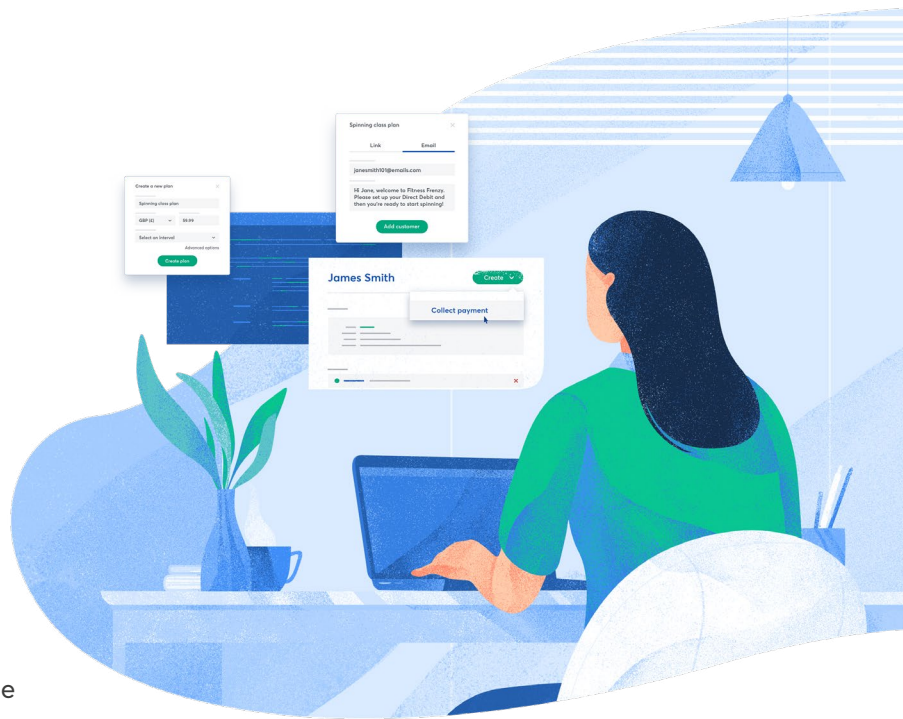
[techsmith.com/video-editor](https://www.techsmith.com/video-editor)

Here's a few that [examples](#) that GoCardless have produced.

Link to support guides from within your product and via welcome emails

Don't assume that users will actually look in your FAQs or support section for answers. Point them to education materials from within your product. Think about where customers are likely to get stuck along the journey, for example immediately after connecting GoCardless, when setting up a mandate, when collecting a payment, during reconciliation etc.

You may also want to link to GoCardless-related support articles via email, for example sending a welcome email when the user first connects to your integration.



Improve and update over time

Support documentation isn't a one-time job. As you iterate your product, learn about new use cases or as GoCardless evolves, it's important to keep support documentation up to date. This includes updating visuals with the latest branding, updating guidance as new features are released or as we enter new markets.

We also recommend having an internal process for keeping support documentation up to date, with regular scheduled reviews and a single owner within the company to do this.

Learn from the best!

We've pulled together some great examples to help you build best-in-class support documentation for your integration:

[Salesforce](#)

[Chargebee](#)

[Sage](#)

[Xero](#)

[Zuora](#)

[Zoho](#)

[GoCardless dashboard](#)