

Configuring the Qualpay Gravity Forms Plugin for Recurring Payments

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Now that the Qualpay plugin has been installed and configured with Gravity Forms and WordPress, you can set up [Qualpay's Recurring Billing](#) engine to manage all of your business' scheduled billing needs. The below steps will walk you through the set-up process.

Configure the Qualpay settings

1. Log into your WordPress admin dashboard.
2. Click **Forms** -> **Settings**.
3. Select **Qualpay** from the Settings sub-navigation.
4. Enter the [Sandbox Merchant ID](#) for your Qualpay account.
5. Enter the [Sandbox API Security Key](#) for your Qualpay account.
6. Enter the [Production Merchant ID](#) for your Qualpay account.
7. Enter the [Production API Security Key](#) for your Qualpay account.

If you wish to test your plugin in the sandbox exclusively prior to processing live transactions, enter only your [Sandbox Merchant ID](#) and [Sandbox API Security Key](#) on the Qualpay Settings Authentication page where indicated.

Once you have completed sandbox testing, and are ready to begin processing live Customer transactions in the production environment, enter your [Production Merchant ID](#) and [Production API Security Key](#) on the Qualpay Settings Authentication page where indicated.

Enable and verify your Qualpay API Security Keys

1. Log into the Qualpay Manager, either on [sandbox](#) or [production](#).
2. Select **API Security Keys** -> **Administration**.
3. Verify that the [API keys are enabled](#).

If you are processing recurring payments, the API keys for the following products must be enabled:

- Payment Gateway API
- Embedded fields API
- Recurring Billing API
- Customer Vault API

Configuring your form

[After installing and configuring the Qualpay plugin](#), you will build a form for your payment page. This is

done by using the Pricing fields to create and manage available purchase selections, and the Credit Card field that allows Customers to enter their credit card information on the form. To get started, follow the below steps.

1. Log into the WordPress admin dashboard.
2. Click on **New Form** under the **Forms** navigation in your WordPress admin dashboard.
3. Click on **Add New**.
4. Assign a **Title** to your form. Click **Create Form**.
5. Add all mandatory **Payment Fields** for capturing standard transaction information, such as *Name* and *Email*, into the form. You can additionally add any available **Optional Fields** at this point.
6. Add the mandatory **Pricing Fields** (*Product*, *Credit Card*, and *Total*) to your form, and configure them to suit your needs.
7. Save your form by clicking **Update**.
8. Optionally, you can add a separate **Product** field to configure a Set-Up fee for your plan if needed.
9. Save your form by clicking **Update**.

Once the form has been updated successfully, you will next set up the data feeds that will link the form to your Qualpay account.

Setup Qualpay Feeds

Now that you have activated the Qualpay plugin, configured Gravity Forms, and created a form to interact with Qualpay, it is time to bring it all together. Next, you will configure the form's data feed to integrate with Qualpay.

1. Log into the WordPress admin dashboard.
2. Click **Settings** -> **Qualpay** to access the plugin **Form Settings** page.
3. Select the form you will integrate with Qualpay.
4. Choose the **Environment** where you will host the form. Select **Sandbox** to host the form on Qualpay's sandbox for testing, or select **Production** to host the form in the live production environment.

Note: You will see the option to toggle between Sandbox and Production environments only if you have added your [Production Merchant ID](#) and [Production API Security Key](#).

5. Click **Let's go create one** to add a new Qualpay Feed.

6. Enter a unique Name for the new Qualpay feed to distinguish between multiple active Qualpay feeds if utilized.
7. Select **Subscription** from the **Payment Type** drop-down menu.
8. You can also add a **Plan Type** to the Subscription. The Plan Type can be either a *One-Off* or *Existing Plan*.
9. In **Transaction Fields**, select the form that you will configure.
10. Add a **Plan Frequency** for your Subscription. You can choose from **Weekly, Bi-Weekly, Monthly, Quarterly, BiAnnually, or Annually**.
11. Add a **Plan Duration**. Plan Duration is the number of billing cycles in the recurring transaction; Use -1 if a billing cycle is indefinite.
12. Click **Update Settings** to save the Qualpay Feed.

Embedding A Form

Once you are ready to publish your form, it must first be embedded in a page. Follow the below steps to embed your form.

1. Log into the WordPress admin dashboard.
2. Click **Pages** -> **Add New**.
3. Add a Title to your page.
4. Click **Add Form**.
5. Select a form to embed in the page.
6. Click **Insert Form**.
7. Click **Preview** to review the page prior to publishing.
8. Click **Publish** to publish the form on the page.

Now that Recurring Payments have been set up and configured for your account, begin testing your store in the Qualpay sandbox. When your sandbox testing is complete, it is time to [process a test transaction in the live production environment](#), to validate functionality prior to accepting real Customer orders.
