ValitorOmni App for Shopify

version 1.0

VALITOR

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ValitorOmni app for Shopify

You can use the ValitorOmni app for Shopify to configure the gateway, and access various gateway features directly in Shopify.

From now on, we will refer to the gateway and the gateway app for Shopify as the **Shopify plugin**. The **Valitor Omni-Channel gateway** refers to the Valitor Omni-Channel user interface, which is not part of Shopify.

Versions

New versions of the Valitor Omni-Channel plugin for Shopify will be released as new features are added and bugs are fixed. The release notes for the plugin can be accessed at https://github.com/ValitorOmni/ShopifyPlugin.

Installing the Gateway and App for Shopify

To use the Valitor Omni-Channel gateway in your shop, you need to install:

- The Valitor Omni-Channel gateway for Shopify
- The ValitorOmni app for Shopify

Prerequisites.

You will need:

- The username and password for your Valitor Omni-Channel account
- If you have a production account, you will need a URL, e.g. https://testgateway.altapaysecure.com
- The <shop_name> in the URL for your Shopify shop's admin page
  (It is typically in the format **https://<shop_name>.myshopify.com/admin**.)

All of these details will be emailed to you by Valitor as part of the onboarding.

To install and set up the Valitor Omni-Channel gateway in your Shopify shop:

1. First, you need to install the Valitor Omni-Channel gateway in Shopify.
   - Go to the appropriate link. If you are working in the production environment, replace <shop_name> with the one identified in your admin page:

Test	https://<shop_name>.myshopify.com/admin/authorize_gateway/1054445
Production	https://<shop_name>.myshopify.com/admin/authorize_gateway/1054447

- Follow the installation steps.
- When prompted for a username and password, enter the username and password from your Valitor Omni-Channel account.

2. Next, install the ValitorOmni app.
   - Go to the appropriate link, replacing <shop_name> with the one identified in your admin page:

Test	https://shopifystaging.altapayplatform.com/api/shopify/apps/authentication?shopHostName<shop_name>myshopify.com
Production	https://shopify.altapaysecure.com/api/shopify/apps/authentication?shopHostName=<shop_name>

- You will be prompted for your Valitor Omni-Channel username and password, and the URL if you are setting up a production account.

See further details for configuring the Valitor Omni-Channel gateway via the app in "Using the ValitorOmni app for Shopify" on page 13.

Configuring the Gateway Account

When you first open the app from the administration page in Shopify, you need to configure the gateway account.

> **Notes.**
>
> You will need:
>
> - The username and password for your Valitor Omni-Channel account
> - The URL for your Shopify shop's admin page.
>   (It is typically in the format **https://<shop_name>.myshopify.com/admin**.)
>
> All of these details will be emailed to you by Valitor as part of the onboarding.

1. Navigate to the Admin page, using the URL.
2. You will see that there are two tabs on this page, even if you do not have a production account:

   - **Test** for configuring a test account which can be used to test the gateway. No actual financial transactions will be made via this account.
   - **Production** for configuring the production account, i.e. the account which will enable actual financial transactions

3. Make sure that you are working in the correct tab.
4. Enter the username and password Valitor has given to you.

5. If you are working in the Production account, specify the URL.

Gateway Account Configuration

ⓘ **Updating account settings**
When you update the account settings, you must update the account settings in the gateway configuration as well.

Production account   Test account

Gateway username

test@valitor.com

The Valitor gateway username.

Gateway password

••••••••••••••

The Valitor gateway password.

Gateway URL

https://merchantGateway.altapaysecure.com

The Valitor gateway URL.

Save

6. Next, you need to configure the payment methods (terminals). See "Configuring the Payment Methods (terminals) in the Shopify app" on page 8 for more details.

Configuring the Payment Methods (terminals) in the Shopify app

Prerequisites.

To log in, you will need:

- The username and password for your Valitor Omni-Channel account
- The URL for your Shopify shop's admin page.
  (It is typically in the format **https://<shop_name>.myshopify.com/admin**.)

All of these details will be emailed to you by Valitor as part of the onboarding.

1. Navigate to the Admin page, using the URL.

2. You will see that there are two tabs on this page:

   - **Test** for configuring a test account which can be used to test the gateway. No actual financial transactions will be made via this account.

   - **Production** for configuring the production account, i.e. the account which will enable actual financial transactions

3. Make sure that you are working in the correct tab.

4. You will see a list of payment methods configured by Valitor according to the agreement you have made with us.
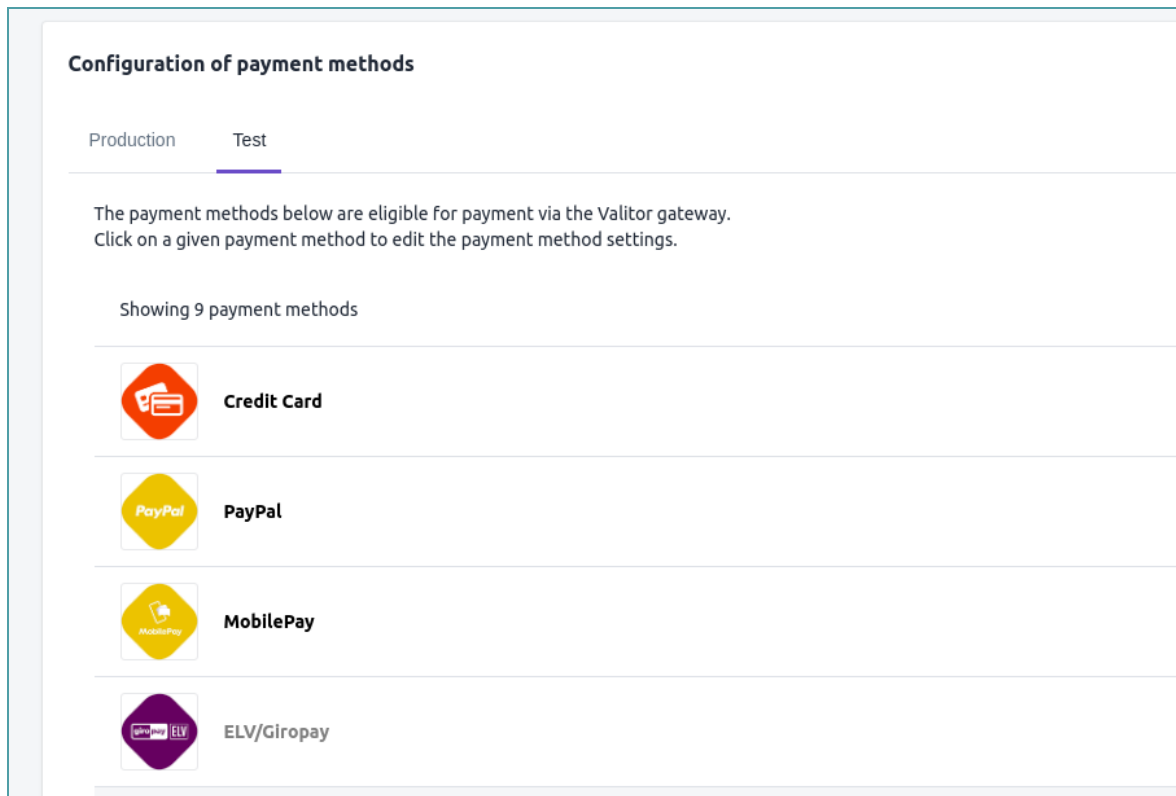
Notes.

The default names of the payment methods come from the title the payment method has been given by Valitor.

5. Click on a given terminal/payment method to change the configuration.

6. The payment method details are displayed.

Configuration of payment methods

Production   **Test**

Payment method name as displayed to customer

Credit Card

The payment method title as defined in the ValitorOmni gateway

Shopify Demo Test Terminal

Secret

The payment method secret as defined in the Valitor gateway

Display priority (a terminal with display priority 1 will be shown at the top of the list)

2

The payment method is **not** a gift card payment method.   [Enable]

The payment method does **not show order details**.   [Show order details]

The payment method is **active** (the customer is able to select the payment method).   [Deactivate]

ICON DISPLAYED TO CUSTOMER

[ ]   No icon

[ELV]   ELV/Giropay

[ViaBill]   ViaBill

[PayPal]   PayPal

Here, you can change the following parameters:

- **The name of the payment method as displayed to the customer**.
- The payment method **secret**. If it is decided as part of the onboarding process that this parameter is relevant for you, it will be provided by Valitor.
- A **display priority**. Enter a value to indicate the order in which you want payment methods displayed on the page where the customer selects their

preferred payment method. 1 is the highest priority. If you give the same display priority to more than one payment method, they will be shown in alphabetical order.

- Whether the payment method is a **gift card payment method**.
- Whether **order details** will be shown in the payment form.

> Tips.
>
> If a high amount of orders are placed in a shop (more than 2 orders per second), it might require additional time (up to 4 seconds) to fetch the order details from Shopify due to their API call limit. If you do not want this delay, disable this option.

- Whether the **payment method is active** - this decides whether the customer can select this payment method to complete the transaction.
- A predefined **icon** to display to the customer for a given payment method. These icons are made available as part of the installation.

7. Click on **Save** to save the details.

Requirements for Specific Payment Methods

Klarna

A customer telephone number is required when using Klarna.

1. In Shopify, navigate to Settings > Checkout.

2. Go to the **Form Options** section, and mark the **Shipping address phone number** in the checkout flow as "Required".

Form options

Choose whether your checkout form requires extra information from your customer.

Full name
○ Require last name only
● Require first and last name

Company name
○ Hidden
● Optional
○ Required

Address line 2 (apartment, unit, etc.)
○ Hidden
● Optional
○ Required

Shipping address phone number
○ Hidden
○ Optional
● Required

Using the ValitorOmni app for Shopify

Crediting a customer

To refund orders, you can just go to the given order and click "Refund". However, you might want to credit a customer who has not placed an order. In this case you can use the **Credit Customer** functionality in the app. There are two ways to credit a customer; by credit card token, and by credit card details.

Credit by credit card token

If the credit should go on a card that the customer has used on an order, but the customer does not want to give out their payment details, you can use a unique credit card token instead. All you need is the customer email address which was used on the order.

1. Navigate to the Admin page, using the URL.

2. Select **Apps** in the left hand pane, and then **ValitorOmni Gateway.**

3. Then go to the **Credit Customer** screen.

   > **Notes.**
   >
   > There are two tabs; Production and Test. Make sure you are working in the correct one.

Credit Customer

Use one of the options below to credit a customer.

Production   **Test**

Credit by credit card token

Customer email

The email is used to lookup possible credit cards to credit

Lookup credit cards

Credit by credit card details

Payment method to use for credit

Shopify Demo Test Terminal

Description

Credit

A description of the credit

Amount to credit

DKK

The amount to credit to the selected credit card

Clear fields   Credit customer

---

4. Key in the email address.

5. Click on **Lookup credit cards**.

6. A drop down list of previously used credit cards is displayed, with masked PANs.

7. Verify which card the customer wishes to credit.

8. Select the relevant payment method, enter a description and the amount to credit.

Credit Customer

Use one of the options below to credit a customer.

Production   **Test**

Credit by credit card token

Customer email

The email is used to lookup possible credit cards to credit

Lookup credit cards

Credit by credit card details

Payment method to use for credit

Credit Card

Description

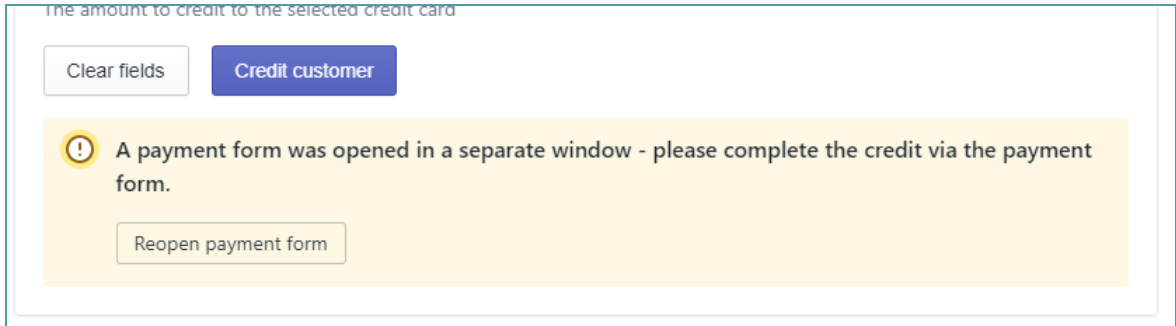Credit

A description of the credit

Amount to credit

99.90   DKK

The amount to credit to the selected credit card

Clear fields   Credit customer

9. Click **Credit customer**.

10. A new window with a payment form will be opened, prefilled with the credit card details related to the selected credit card. You must still ask the customer for the CVC/CVV2 for security reasons. The link to the payment form will be shown in the app

as well, in case you have disabled pop-up windows.

Notes.

Making the credit via Valitor's payment form means that you as a merchant do not need to be PCI compliant.

Credit by credit card details

If the customer has not placed an order in your shop before, or wants to use a card he/she has not used in your store before, you should credit by credit card details.

1. Navigate to the Admin page, using the URL.
2. Select **Apps** in the left hand pane, and then **ValitorOmni Gateway.**

3. Then go to the **Credit Customer** screen.

Credit Customer

Use one of the options below to credit a customer.

Production   Test

Credit by credit card token

Customer email

[   ]

The email is used to lookup possible credit cards to credit

Lookup credit cards

Credit by credit card details

Payment method to use for credit

[Shopify Demo Test Terminal   ⇕]

Description

[Credit]

A description of the credit

Amount to credit

[DKK ⇕]

The amount to credit to the selected credit card

Clear fields   Credit customer

Notes.

There are two tabs; Production and Test. Make sure you are working in the correct one.

4. In the Credit by credit card details section, select the relevant payment method, enter a description and the amount to credit.

5. Click **Credit customer**.

6. A new window with a payment form will be opened, and you need to fill out the payment details supplied by the customer. If the customer does not want to give their

credit details over the phone, you can verify the card using a link. See "Verifying a Card via Link" on the next page for more details.

Verifying the Order against Stock

In the Settings, you can configure whether you want a given order to be verified in relation to product stock, as well as discount and shipping validity during the authorization flow before the payment is taken.
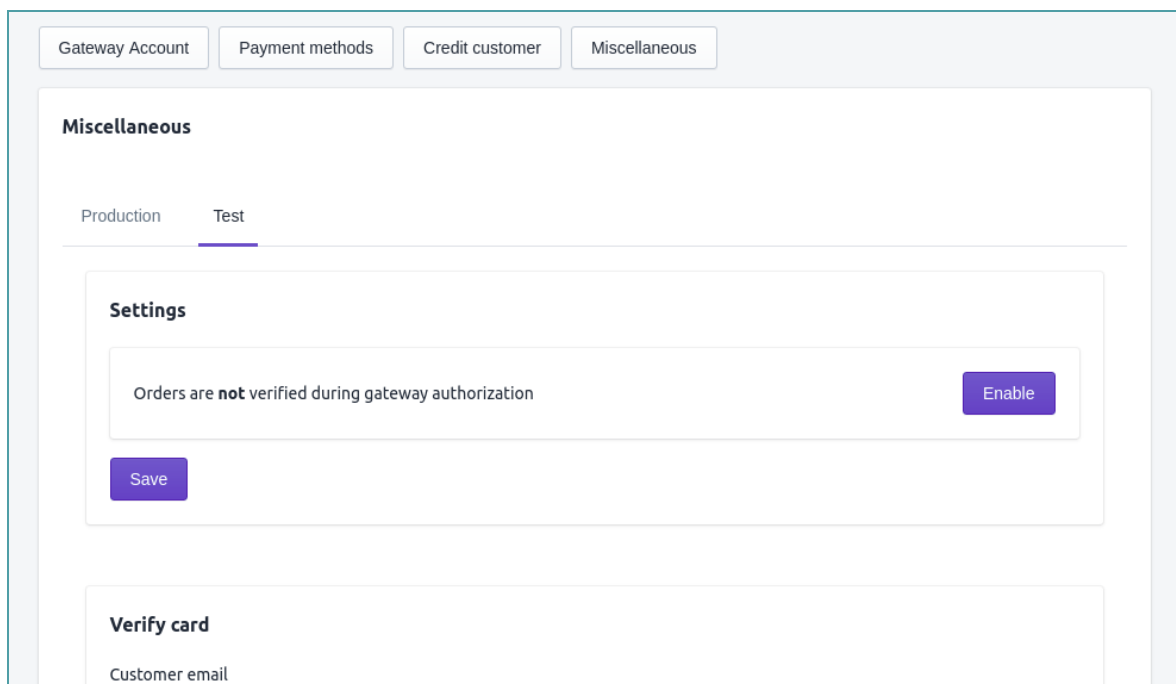
1. Navigate to the Admin page, using the URL.
2. Select **Apps** in the left hand pane, and then **ValitorOmni Gateway.**
3. Then select the **Miscellaneous** button at the top of the window.
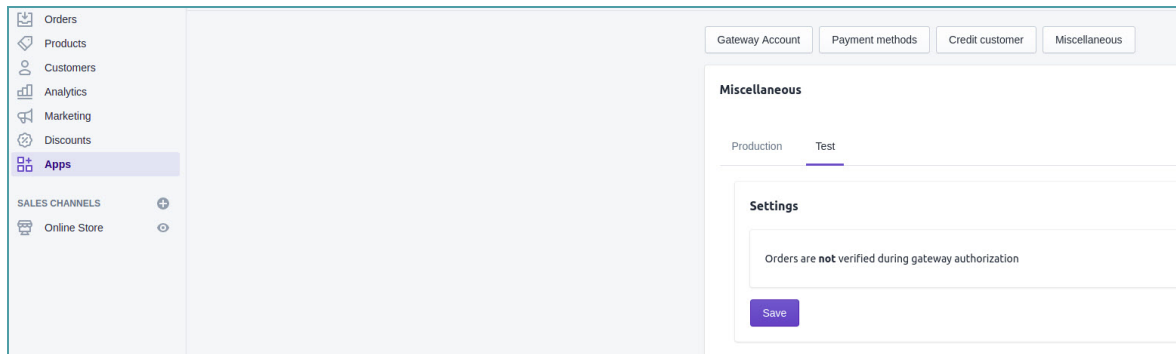
Notes.

There are two tabs; Production and Test. Make sure you are working in the correct one.

4. In the Settings section, choose whether you want to enable/disable the verification.

Verifying a Card via Link

If a customer does not want to give out their payment details by phone, you can generate a link to Valitor's secure PCI compliant payment form, and send it to them via email.

The customer can use the link to the payment form to enter their payment details securely, and you (the merchant) can then use a unique credit card token for the card, e.g. for crediting the customer.

1. Navigate to the Admin page, using the URL.

2. Select **Apps** in the left hand pane, and then **ValitorOmni Gateway.**

3. Then select the **Miscellaneous** button at the top of the window.
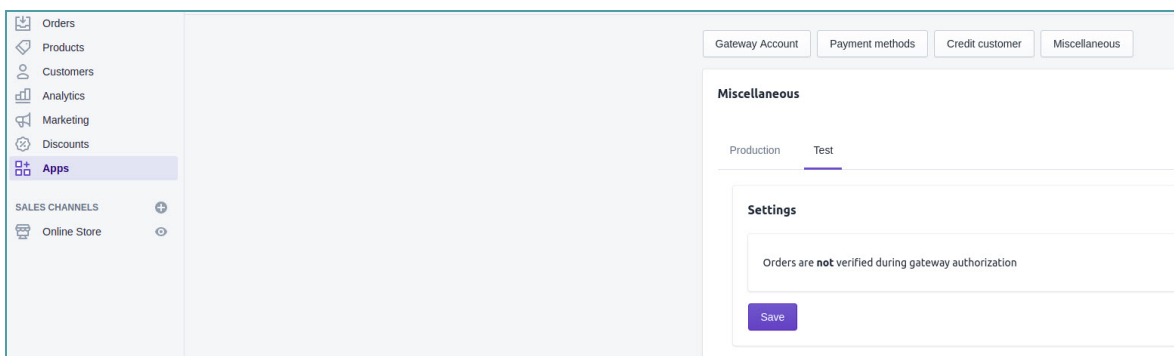
Notes.

There are two tabs; Production and Test. Make sure you are working in the correct one.

4. Navigate to the **Verify card** page.

5. Specify the customer email, and the terminal/payment method.

6. Click on **Send verify card link**.

7. The customer will receive an email from the Valitor payment gateway, which will contain a link to the payment form.

8. When the customer completes and returns the details, a token is generated.

9. When you (the merchant) are told by the customer that the details have been submitted, you can use the token in place of the card details to complete transactions.

Querying a Gift Card

If your agreement with Valitor includes the gift card payment method, you can query the remaining amount on the gift card, in case a customer requests this information.

The query can either be made by the account identifier (gift card number), or by gift card token.
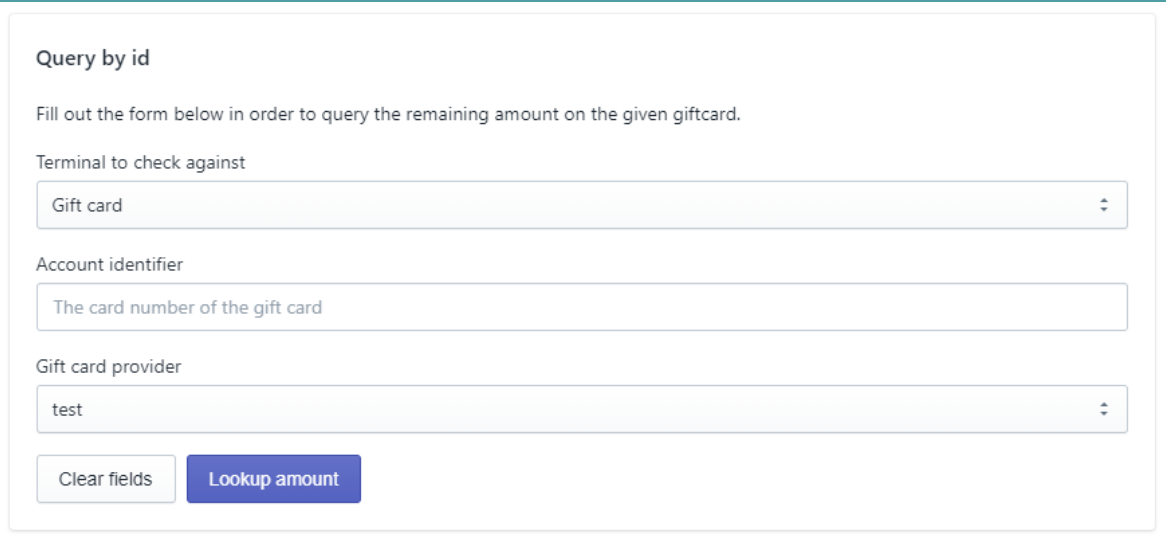
Query by account identifier (number)

1. Navigate to the Admin page, using the URL.

2. Select **Apps** in the left hand pane, and then **ValitorOmni Gateway.**

3. Then select the **Miscellaneous** button at the top of the window.

   > **Notes.**
   >
   > There are two tabs; Production and Test. Make sure you are working in the correct one.

4. Navigate to the **Query by id** page.

5. Complete the details, specifying the relevant payment method, the card number of the gift card, and the gift card provider.

   Query by id

   Fill out the form below in order to query the remaining amount on the given giftcard.

   Terminal to check against

Gift card	⇕

   Account identifier

The card number of the gift card

   Gift card provider

test	⇕

   [Clear fields] [**Lookup amount**]

6. Click on **Lookup amount** to display the remaining balance.

Query by gift card token

To query by gift card token, select the relevant payment method in the **Terminal to check against** field, and enter the gift card token.

1. Navigate to the Admin page, using the URL.

2. Select **Apps** in the left hand pane, and then **ValitorOmni Gateway.**

3. Then select the **Miscellaneous** button at the top of the window.

> **Notes.**
>
> There are two tabs; Production and Test. Make sure you are working in the correct one.

4. Navigate to the **Query by id** page.

5. Complete the details, specifying the relevant payment method, and the gift card token.

Query by token

Fill out the form below in order to query the remaining amount on the given giftcard.

Terminal to check against

Gift card	⬍

Token

The gift card token

Clear fields   Lookup amount

6. Click on **Lookup amount** to display the remaining balance.

Viewing Payment Details

You can view details on payments in the Shopify app, including payment method, fraud information, payment options, and, if relevant, gift card details.

1. Navigate to the Admin page, using the URL.

2. Select **Orders** in the left hand pane, and then **All Orders.**

3. Navigate to the **Query by id** page.

4. Select the order you want to view.

5. Here, you can see:
    - the Valitor Omni-Channel transaction id in Shopify by looking at the authorization of the Shopify order timeline, under the heading **Gateway reference**

- which payment method was used for a given payment in the order timeline, listed under **X message**

6. The Valitor Omni-Channel gateway provides fraud information which can be seen to the right for a given Shopify order, under **ValitorOmni gateway**.
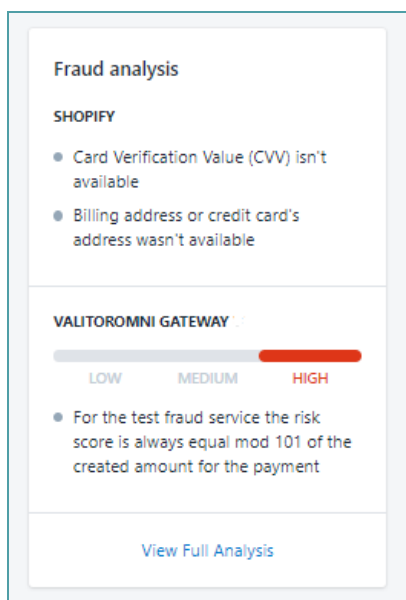
Notes.

The example in the screenshot is from the test environment which explains the text describing the fraud evaluation.

7. Some of the payment methods provided by Valitor may not support all payment options such as payment release, refund or multiple refunds. You can see whether an option is supported for a given payment, under **Additional Details** for a given order:
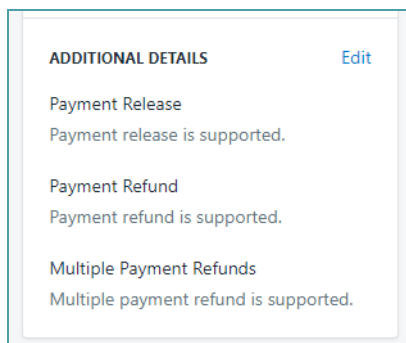
Notes.

You can change the information that you see by clicking on **Edit** and updating the details.

8. If your agreement with Valitor includes a gift card payment method, you can enable customers to query the remaining amount of their gift card. In order to do this, you must:

- enable the gift card option on the given terminal - see Configuring the payment methods (terminals) for more information.
- Insert a piece of code in your Shopify theme code. Which code to insert depends on which theme you are using, but an example of the code can be seen in "Editing Shopify Theme Code" on page 31.

Switching between production and test environments

If you want to test the gateway in the test environment and switch to the production environment, or vice versa, you must remember to:

- Change the account details on the gateway, and set the test flag accordingly:
    1. Go to Settings > Payment providers.
    2. Scroll down to **Alternative payment methods**.
    3. Click **Edit** where it says "ValitorOmni is active".

Alternative payment methods

External payment methods that can be used in addition to either a third-party provider or Shopify Payments.

Choose alternative payment

ValitorOmni STAGING is active   Edit

Tips.

Ensure the relevant account is defined in the app, as described in "Configuring the Gateway Account" on page 6.

Making a test order

In order to place an order and pay with the Valitor Omni-Channel test gateway, you should first ensure the test environment is properly set up:

- Change the account details on the gateway, and set the test flag accordingly:
    1. Go to Settings > Payment providers.
    2. Scroll down to **Alternative payment methods**.
    3. Click **Edit** where it says "ValitorOmni is active".

Alternative payment methods

External payment methods that can be used in addition to either a third-party provider or Shopify Payments.

Choose alternative payment

ValitorOmni STAGING is active   Edit

1. Place an order, selecting the Valitor Omni-Channel gateway in the checkout.
2. Select the payment method on the following page and enter some dummy payment details.
3. You know that it has completed successfully when the Success page is displayed.

Editing Shopify Theme Code

If you want to use a gift card terminal, you can enable the customer to query a gift card by inserting the source code below in the theme.

1. Navigate to Online Store > Themes

2. Click Actions > Edit code on the current theme.

3. **If you are using the test gateway**, insert the following:

```
<form
action="https://shopifystaging.altapayplatform.com/api/shopify/public
/giftcards">
            <input type="hidden" name="environment" value="test">
            <input type="hidden" name="shopName" value="<shop_name>">
     Account identifier:<br>
     <input type="text" name="accountIdentifier">
     <br>
     Gift card provider:<br>
     <select name="provider" >
         <option value="test">test</option>
   </select>
     <br><br>
     <input type="submit" value="Submit">
</form>
```

> **Notes.**
>
> <shop_name> should be replaced by the shop name, as explained in Installing the ValitorOmni gateway in your Shopify shop.

4. **If you are using the production gateway**, replace the test code with the following:

```
<form
action="https://shopify.altapaysecure.com/api/shopify/public/giftcard
s">
            <input type="hidden" name="environment" value="prod">
            <input type="hidden" name="shopName" value="<shop_name>">
     Account identifier:<br>
     <input type="text" name="accountIdentifier">
     <br>
     Gift card provider:<br>
     <select name="provider" >
         <option value="test">PPS</option>
         <option value="test">SVS</option>
   </select>
     <br><br>
     <input type="submit" value="Submit">
</form>
```

Further information

For more information, please see the general Valitor Omni-Channel documentation at https://github.com/ValitorOmni/Shopify.

Help

If you experience any problems when installing or using the gateway or the app, please contact customerservice.gw@valitor.com