



Shopify Access Worldpay Direct checkout technical guide

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1. Introduction

The Worldpay credit card payments app for Shopify is an onsite/native or direct app that enables you to quickly and simply integrate Worldpay payments within your Shopify stores. It gives you a comprehensive suite of payment options with security features and partial refunds included, and has been designed to integrate easily into your business thanks to:

- **Fast installation:** Clear, succinct documentation speeding up development time
- **Lowest possible PCI DSS burden:** Reach and maintain PCI compliance with minimum effort
- **24/7 support:** Payment incident support is available 24/7, while support is available 24/5 for most other issues. Contact your Worldpay support representative or our customer service team on 0800 096 3997

1.1 Overview of Worldpay plugin features

The table below lists the main features of our plugin:

Features	Description
Supported credit cards	Visa, Mastercard, Maestro, American Express, Discover*, JCB*, Cartes Bancaires*
Supported 3DS credit cards	Visa, Mastercard, Maestro, American Express
Access checkout Web SDK	Take payments and still qualify for SAQ-A – the lowest PCI compliance level – with Worldpay Web SDK
3DS authentication	3D Secure authentication (strong customer authentication)

Note: The list of features offered by the Worldpay credit card payment app is determined by the newly launched Shopify payment API and we will add more features as Shopify APIs support them.

* Please note that Discover/Diners, JCB, Cartes Bancaires are not supported by 3DS within Access Worldpay yet.

1.2 Prerequisites

You must have installed the payment app and correctly set up your Shopify store. If you want to use manual capture, then please disable auto capture from your Shopify store admin. If you have any problems with your payment app set-up, visit [Shopify Payment app support](#).

1.3 How to get started

Make sure your Worldpay Implementation Manager or support contact has given you:

- An Access Worldpay JSON username and password for the authorisation header within the API request
- A merchant entity reference for use with every transaction
- An AccessCheckout identity for every credit card payment request
- A username and password for the [Worldpay Merchant Administration Interface \(MAI\)](#)
- A username and password (header authorisation credentials) for the Worldpay middleware admin panel for the following environments:
 - Live environment (Within the middleware where merchants can perform configurations)
<https://liveapp.access-worldpay.com/admin-ps-awp-lr-shpy-21/>
 - For test and staging environment details, please contact your Worldpay Implementation Manager

1.4 Basic configuration

After you've logged in to the Worldpay middleware administration interface, click on **General** Configuration:

The screenshot displays the 'General Configuration' page in the Worldpay middleware administration interface. At the top, a blue header bar contains the text 'General Configuration'. Below this, a pink banner reads 'PLEASE FILL OUT ALL FIELDS MARKED BY(*)'. The form consists of several fields, each with a label, a text input, and a descriptive note:

- Shopify Store URL ***: Input field with placeholder 'xxxxxxxxxxxx.myshopify.com'. Note: 'Enter you store URL. Example : test-shop.myshopify.com'.
- Order Type ***: Dropdown menu with 'Test Order' selected. Note: 'Test Order is an order placed during maintenance or investigation'.
- Test Order Worldpay URL ***: Input field with placeholder 'https://xxxx.xxxxxxxxxx.com'. Note: 'This URL will be used during maintenance or investigation. For this detail, You must connect with your Worldpay contact.'
- Live Order Worldpay URL ***: Input field with placeholder 'https://xxxxxxxx.com'. Note: 'For this detail, You must connect with your Worldpay contact.'
- Merchant Entity Reference ***: Input field with placeholder 'defxxxxx'. Note: 'For this detail, You must connect with your Worldpay contact.'
- Login Username ***: Input field with placeholder 'xxxxxxxxxxxxxxxxxxxxx'. Note: 'This is used for login.'
- Access Worldpay Username ***: Input field with placeholder 'xxxxxxxxxxxxxxxxxxxxx'. Note: 'For this detail, You must connect with your Worldpay contact.'
- Access Worldpay Password ***: Input field with placeholder '*****'. Note: 'For this detail, You must connect with your Worldpay contact.'
- AccessCheckout Identity ***: Input field with placeholder 'xxxxxxxx-xxxxxx-xxxxxx-xxxxx'. Note: 'For this detail, You must connect with your Worldpay contact.'
- OMS Cron Job Frequency ***: Dropdown menu with 'Every 5 Minutes' selected.

A green 'Save' button is located at the bottom left of the form.

Note: Each set of credentials, including the merchant entity reference, can be configured for only one shop store URL.

The table below describes the fields, and what you'll need to input to complete a basic configuration:

Features	Description
Shopify Store URL	Shopify Store domain name
Order Type	For the production environment app (Worldpay Payments Credit Card), both test and live modes are available, and orders can be placed depending on the selection
Test Order Worldpay URL	The Worldpay test environment's URL The environment mode is test mode
Live Order Worldpay URL	The Worldpay production environment's URL The environment mode is live mode
Merchant entity reference	This is used to identify and manage payment transactions and will be auto populated
Login Username	This is used to log in and will be auto populated
Access Worldpay Username	You will need these in the authorisation header for API requests. This will be auto populated
Access Worldpay Password	This is used for login and API requests. You'll need to enter your password in the authorisation header for API requests. This will be auto populated.
Access Checkout Identity	To get your Access Worldpay credentials, contact your Worldpay Implementation Manager. This is a mandatory field for all credit card payments
OMS Cron Job Frequency	To set the frequency of a programming job that synchronizes the order status for capture, cancel and refund The recommended frequency is every 5 minutes due to high number of transactions

Once the basic configuration is completed, you must set up the AccessCheckout integration to begin accepting credit card payments. Details on this are in Section 2 of this guide, "Main Configuration".

1.5 Credit/debit card integration

This lets you take payments and still qualify for SAQ-A (the lowest PCI compliance level) using the Worldpay Web SDK.

2. Main configuration

Go to [Configuration/Credit Card Configuration](#) and complete the following details:

Credit Card Using Access Checkout

PLEASE FILL OUT ALL FIELDS MARKED BY(*)

Integration Mode *

Test WebSDK URL *

Live WebSDK URL *

AccessCheckout (Web SDK) ▼

https://xxx.xxxxx.xxxxxxxxx.com/xxxxxxx-xxxx/v1/xxxxxxx.js

This URL will load the secure credit card from using Worldpay's SDK. For this detail, You must connect with your Worldpay contact.

https://xxxxx.xxxxxxxxx.com/xxxxxxx-xxxx/v1/xxxxxxx.js

This URL will load the secure credit card from using Worldpay's SDK. For this detail, You must connect with your Worldpay contact.

Save

The table below describes the fields, and what you'll need to input to complete credit card configuration:

Credit card configuration	Description
Integration Mode	AccessCheckout (Web SDK) integration mode The shopper's card information is saved and captured at the Worldpay end. This integration qualifies for SAQ-A – the lowest PCI compliance level
Test WebSDK URL	This URL will load the secure credit card from using Worldpay's SDK. You must connect with your Worldpay contact for this information
Live WebSDK URL	This URL will load the secure credit card from using Worldpay's SDK. You must connect with your Worldpay contact for this information

2.1 The shopper's experience

Shoppers can place an order using credit or debit cards on the Shopify store checkout page.

2.1.1 Payment journey for shopper


For a guest or registered shopper, the payment form appears as below:


Payment


All transactions are secure and encrypted.

Credit card

VISA









+3

Card number



Expiration date (MM / YY)

Security code



Name on card

☒ Use shipping address as billing address

Pay now

1. The shopper enters their card details and clicks the **PAY NOW** button:

Payment


All transactions are secure and encrypted.

Credit card

VISA

Card number

4444 3333 2222 1111




Expiration date (MM / YY)

12 / 26

Security code

111



Name on card

Demo

☒ Use shipping address as billing address

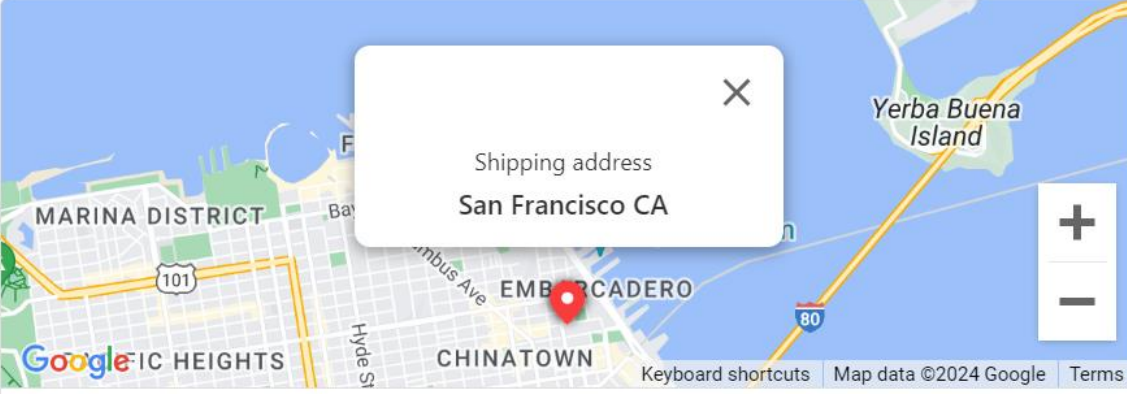
Pay now

If the transaction is successful, the shopper is redirected to a success page, shown below:



Confirmation #0QAL0RMLM

Thank you, xxxx!



Shipping address
San Francisco CA

Your order is confirmed

You'll receive a confirmation email with your order number shortly.

[Download Shop to track package](#)

☐ Email me with news and offers

Order details

Contact information

xxxxxx@xxxxxx.com


Shipping address

xxxx xxxxxxxx
450 xxxxxxxxxxxxxx
San Francisco CA 94111
United States

Shipping method

Standard International

Payment method

 •••• 1111 · £2,653.94

Billing address

xxxx xxxxxxxx
450 xxxxxxxxxxxxxx
San Francisco CA 94111
United States

3. 3DS2 authentication

3DS Flex is the most advanced product on the market for 3D secure 2 (3DS2). It provides greater payment security and helps to increase issuer approvals for transactions covered by PSD2. Certain regions require 3DS2 for processing, if you are unsure about your region requirements this, please contact your Worldpay representative.

3.1 Main 3DS2 configuration

To use 3DS2 authentication, you must enable and configure 3DS2 both with Worldpay and in the app. To configure with Worldpay, tell your Worldpay representative that you want to use 3DS2 and they will enable it on your account. To configure within the app go to **Admin/Configuration/Credit Card with 3DS**.

Credit Card 3DS Configuration

PLEASE FILL OUT ALL FIELDS MARKED BY(*)

Activate 3DS Authentication *	<div>Yes</div> <p><i>If No -- Make sure that your merchant account is supported for non 3DS flow, For this detail, You must connect with your Worldpay contact</i></p>
Challenge Window Type *	<div>Full Page</div>
Merchant Entity Reference	<div>Merchant Entity Reference</div> <p><i>An optional field which would override the Merchant entity reference ID defined under general configuration.</i></p>

Save

3DS Configuration	Description
Activate 3DS Authentication	Yes: Activate 3DS validation for the store No: Deactivate 3DS validation for the store
Challenge Window Type	Full page: This will render 3DS validation in a full-page window Iframe: This will render 3DS validation window in an iframe
Merchant Entity Reference	This optional field will override the merchant entity reference ID that was defined in the general configuration of the store

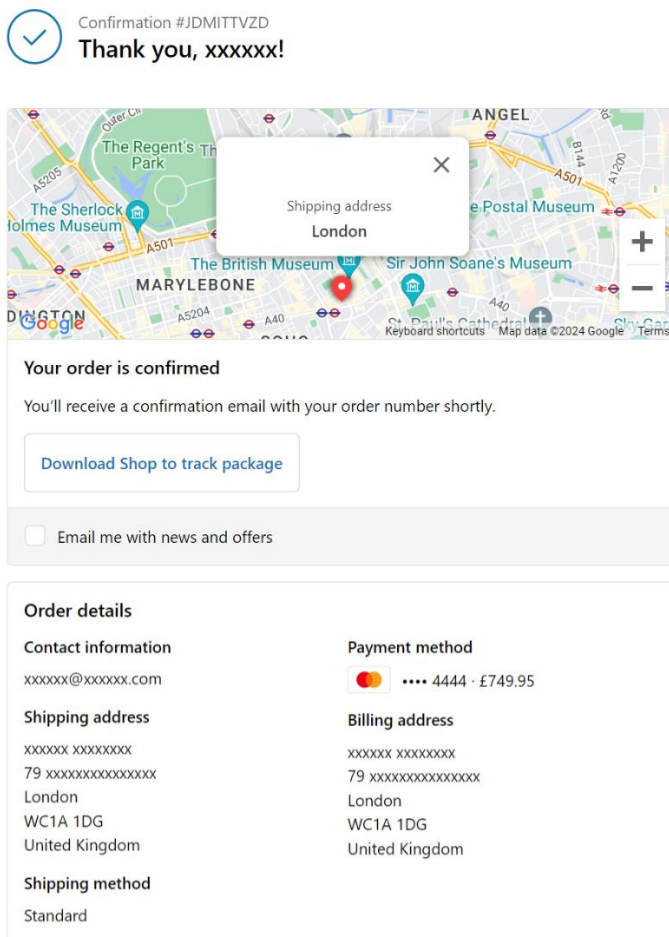
3.2 Sample 3DS Flex challenge page

This is a challenge window press OK



Note: This image is of a test order and for live order a different challenge page may appear.

Finally, shoppers will see the order-success page, as in the screenshot below:



You can see the order in your [Worldpay Merchant Admin Interface](#).

4. The retry policy

A retry policy helps to keep the order status consistent between the payment app, Worldpay and Shopify.

If the Access Worldpay Shopify Plugin does not receive an acknowledgment of a GraphQL request to Shopify payment API (HTTP 200 status code), then the direct app will retry the request according to an incremental strategy. (See the example below). We'll retry up to 18 times over 24h.

Example: [0 seconds, 5 seconds, 10 seconds, 30 seconds, 45 seconds, 1 minute, 2 minutes, 5 minutes, 12 minutes, 38 minutes, 1 hour, 2 hours] + [4 hours] * 5.

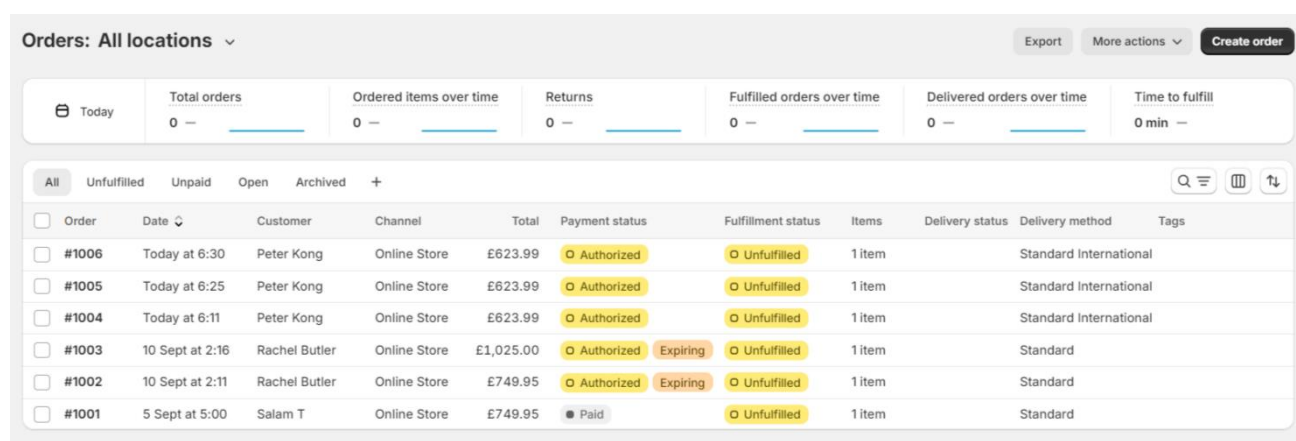
5. Order management

5.1 Manual order capture

Once an order is authorised, you can use the Shopify Store Admin to manually complete the order capture.

To do this, log into the store admin and click the **Orders** menu on the left. You will see a similar list of orders with their status.

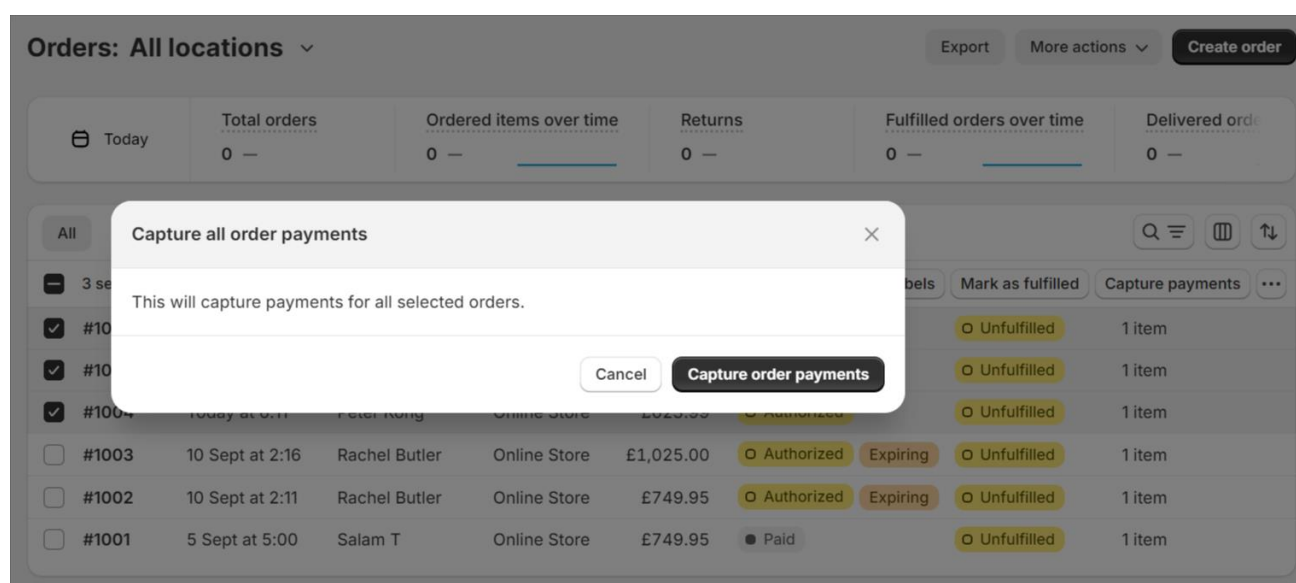
Note: We strongly recommend you initiate the capture from the Shopify admin panel to ensure end-to-end synchronization. Currently, the Shopify capture process restricts the chance of initiating capture request from external applications.



The screenshot shows the Shopify 'Orders' page for 'All locations'. It includes a summary bar with metrics like 'Total orders', 'Ordered items over time', 'Returns', 'Fulfilled orders over time', 'Delivered orders over time', and 'Time to fulfill'. Below this is a table of orders with columns for Order ID, Date, Customer, Channel, Total, Payment status, Fulfillment status, Items, Delivery status, and Delivery method. The table lists several orders, some with 'Authorized' payment status and 'Unfulfilled' fulfillment status, and others with 'Paid' status.

Order	Date	Customer	Channel	Total	Payment status	Fulfillment status	Items	Delivery status	Delivery method	Tags
#1006	Today at 6:30	Peter Kong	Online Store	£623.99	Authorized	Unfulfilled	1 item		Standard International	
#1005	Today at 6:25	Peter Kong	Online Store	£623.99	Authorized	Unfulfilled	1 item		Standard International	
#1004	Today at 6:11	Peter Kong	Online Store	£623.99	Authorized	Unfulfilled	1 item		Standard International	
#1003	10 Sept at 2:16	Rachel Butler	Online Store	£1,025.00	Authorized Expiring	Unfulfilled	1 item		Standard	
#1002	10 Sept at 2:11	Rachel Butler	Online Store	£749.95	Authorized Expiring	Unfulfilled	1 item		Standard	
#1001	5 Sept at 5:00	Salam T	Online Store	£749.95	Paid	Unfulfilled	1 item		Standard	

To send multiple capture requests, select the orders and click **Capture order payments** in the menu:



You can also send capture requests by opening the order details page:

⌚ Authorized Expires on September 21, 2024

Subtotal	1 item	£749.95
Shipping	Standard (0.0 lb: Items 0.0 lb, Package 0.0 lb)	£0.00
Total		£749.95

Paid	£0.00
Balance	£749.95

Capture payment

Timeline

Wf Leave a comment...

😊 @ # 🔗 Post

Only you and other staff can see comments

Today

Order confirmation email was sent to xxxxxx xxxxxxxx (xxxxxx@xxxxxx.com). 5 minutes ago

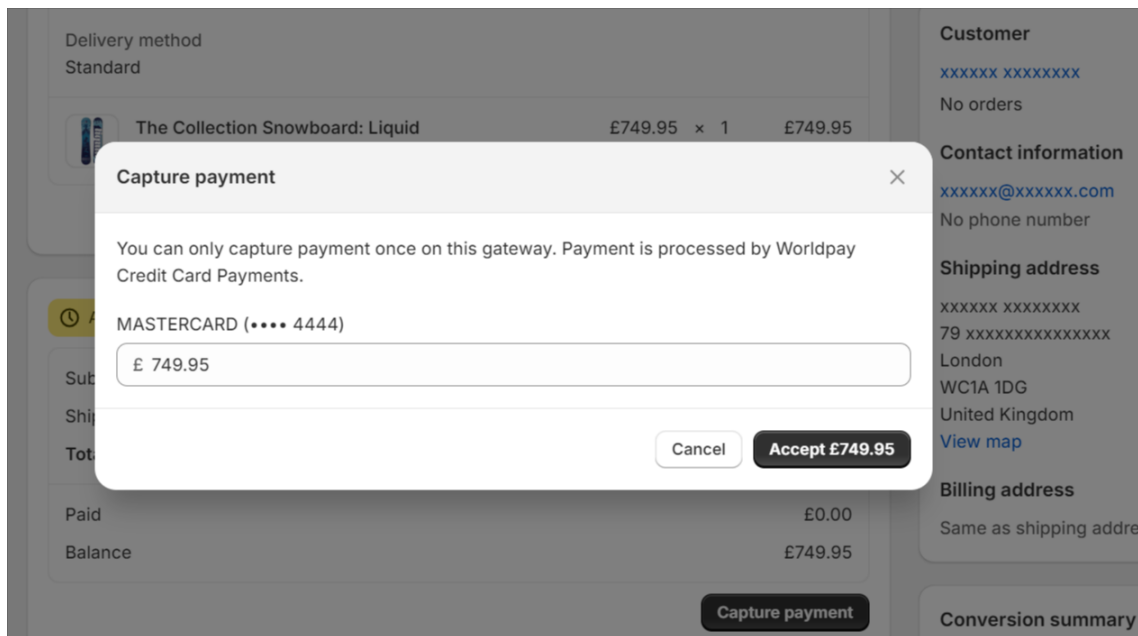
View email

£749.95 GBP was authorized using a Mastercard ending in 4444. > 5 minutes ago

This authorization expires on Sep 21, 2024 at 1:52 pm.

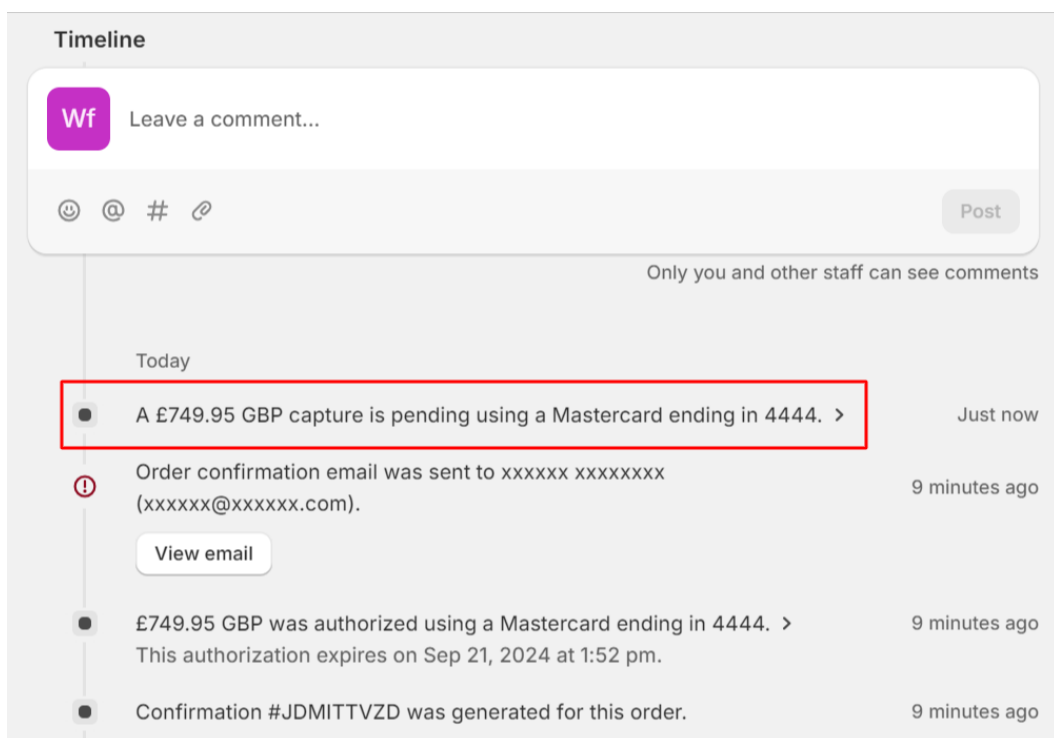
Confirmation #JDMITTVZD was generated for this order. 5 minutes ago

Once you click the **Capture payment**, button you need to wait for confirmation from the Worldpay apps admin account.




Once you accept the capture request, the request is sent to the Worldpay app's admin account. This is where we collect all capture requests by batch. These are sent for capture approval every five minutes.





Once your capture request is approved by the Access Worldpay Gateway, Worldpay middleware will immediately update the order status in the Worldpay middleware and in the Shopify Store admin.



In the order timeline above, the capture request has been sent and is waiting for confirmation. Once a capture is complete, the order status appears as in the screenshot below:





Timeline







Post

Only you and other staff can see comments

Today

- 
 £749.95 GBP was captured using a Mastercard ending in 4444. > Just now
- 
 A £749.95 GBP capture is pending using a Mastercard ending in 4444. > 14 minutes ago
- 
 Order confirmation email was sent to xxxxxx xxxxxxxx (xxxxxx@xxxxxx.com). 23 minutes ago
[View email](#)
- 
 £749.95 GBP was authorized using a Mastercard ending in 4444. > 23 minutes ago
 This authorization expires on Sep 21, 2024 at 1:52 pm.

You can also see the order capture status (Sent for Settlement) in the Worldpay middleware. To do this, log in to your admin account and open the order:

Order ID	Purchase Date ↑	Bill to Name	Email	Grand Total	Payment Method	Status	Action
defau-r9dwN43oAX3XXXXXXXXXXXXXX	16-09-2024 23:22:33	xxxxxx xxxxxxxx	xxxxxx@xxxxxx.com	GBP 749.95	Direct	Sent for Settlement	View

You can check the order status in Worldpay app's administration **Interface/Orders**:

Orders							
Search by Bill to Name		Search	8 records found		Filters		
Order ID	Purchase Date ↑	Bill to Name	Email	Grand Total	Payment Method	Status	Action
defau-r9dwNXXXXXXXXXX	16-09-2024 23:22:33	xxxxxx xxxxxxxx	xxxxxx@xxxxxx.com	GBP 749.95	Direct	Sent for Settlement	View
defau-rMm5lfzS6XXXXXXXXXX	16-09-2024 23:16:44	xxxx xxxxxxxx	xxxxxx@xxxxxx.com	GBP 2653.94	Direct	Authorized	View
defau-rjnsHjXXXXXXXXXXXX	16-09-2024 16:00:37	xxxxxxxxxxxxxx	xxxxxx@xxxxxx.com	GBP 623.99	Direct	Sent for Settlement	View

Clicking the **View** button will display the Order view page:

Order Information	Account Information
Order Date: 16-09-2024 23:22:33	Customer Name: xxxxxxxx xxxxxxxxxx
Payment Method: Direct	Email: xxxxxxxx@xxxxxxxx.com
Order Status: Sent for Settlement	Phone No:
Order Type: Test Order	
Merchant Name: Sapient Demo	
Merchant Entity Reference: xxxxxxxx	
Shopify Store URL: xxxxx-xxxxxx.myshopify.com	
Shopify Payment ID: xxxxxxxxxxxxxxxxxxxxxxxxxx	
Shopify GID: gid://shopify/PaymentSession/xxxxxxxxxxxxxxxxxxxx	
Payment Capture: Manual	

Billing Address	Shipping Address
Given Name: xxxxxxx	Given Name: xxxxxxx
Family Name: xxxxxxxxxx	Family Name: xxxxxxxxxx
Address 1: 79 xxxxxxxxxxxxxxxxxx	Address 1: 79 xxxxxxxxxxxxxxxxxx
City: London	City: London
Postal Code: WC1A 1DG	Postal Code: WC1A 1DG
Province: England	Province: England
Country: GB	Country: GB

Timeline		
<div><div></div><div>Payment 749.95 GBP Captured from Shopify</div><div>Partial Capture : No</div><div>Reference : 4fd15c45-cd4a-4e47-a5ce-a6fe3452e6da</div><div>18-09-2024 23:32:16</div></div> <tr><td><div><div></div><div>Payment authorized</div><div>18-09-2024 23:22:45</div></div><tr><td><div><div></div><div>Payment initiated</div><div>18-09-2024 23:22:34</div></div></td></tr></td></tr>	<div><div></div><div>Payment authorized</div><div>18-09-2024 23:22:45</div></div> <tr><td><div><div></div><div>Payment initiated</div><div>18-09-2024 23:22:34</div></div></td></tr>	<div><div></div><div>Payment initiated</div><div>18-09-2024 23:22:34</div></div>
<div><div></div><div>Payment authorized</div><div>18-09-2024 23:22:45</div></div> <tr><td><div><div></div><div>Payment initiated</div><div>18-09-2024 23:22:34</div></div></td></tr>	<div><div></div><div>Payment initiated</div><div>18-09-2024 23:22:34</div></div>	
<div><div></div><div>Payment initiated</div><div>18-09-2024 23:22:34</div></div>		

5.2 Auto capture/settle

Note: Before you start configuring the auto settlement feature in Shopify Store admin, please get in touch with your Worldpay technical representative to enable it on the AccessWorldpay gateway.

First you must enable the auto capture option from your Shopify Store admin.

Log in to Shopify Store admin, click on **Setting** in the left-hand menu then click on **Payments**. You will see the page below:

Payment capture method

Payments are authorized when an order is placed. Select how to [capture payments](#):

☐ Automatically at checkout
Capture payment when an order is placed

☐ Automatically when the entire order is fulfilled
Authorize payment at checkout and capture once the entire order is fulfilled

☒ Manually
Authorize payment at checkout and capture manually

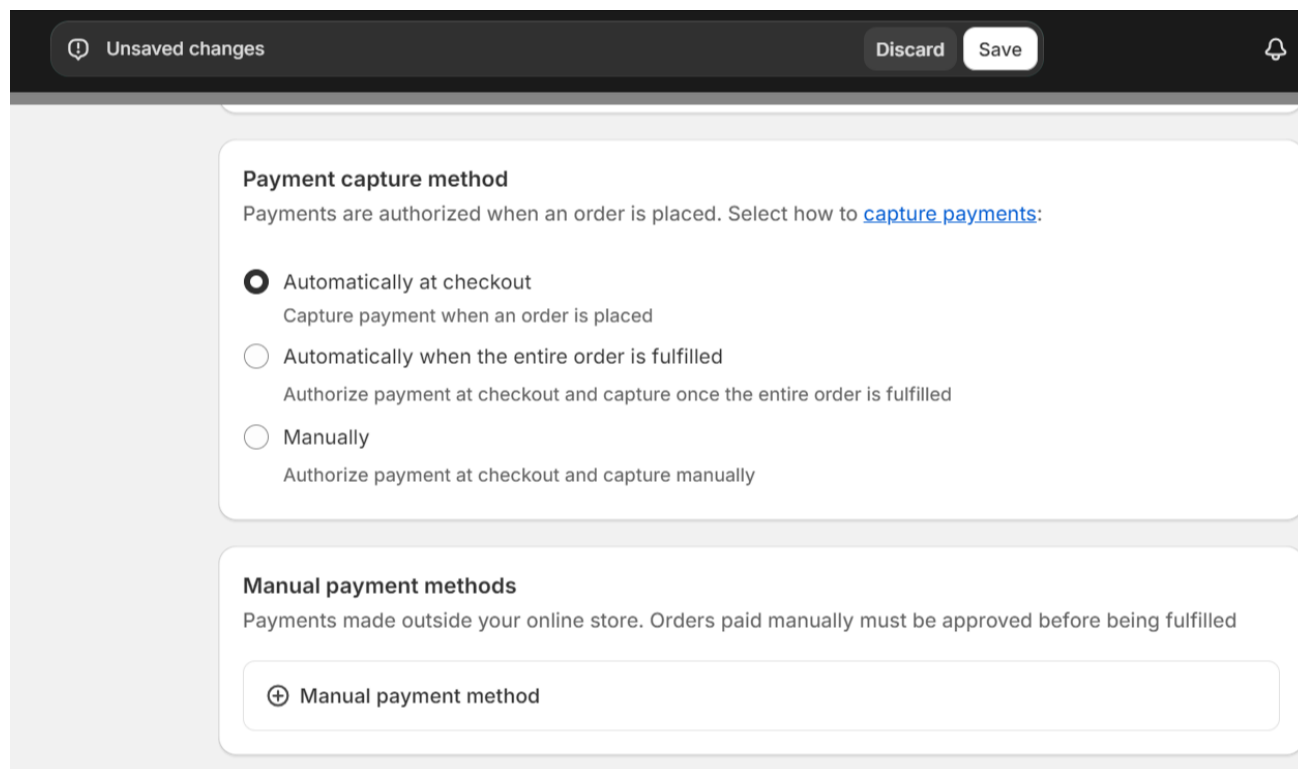
☐ Send a warning 1 day before an authorization expires to chandan.sinha@publicissapient.com

Manual payment methods

Payments made outside your online store. Orders paid manually must be approved before being fulfilled

Manual payment method

In the '**Payment capture method**' section for auto capture, you will see two options: one for **Automatically at Checkout** and another for **Automatically when the entire order is fulfilled**:



The screenshot shows the Shopify AWP Direct Checkout settings interface. At the top, there is a dark header bar with a notification icon and the text "Unsaved changes", a "Discard" button, and a "Save" button. Below the header, the main content area is divided into two sections. The first section is titled "Payment capture method" and contains the text "Payments are authorized when an order is placed. Select how to [capture payments](#):". It features three radio button options: "Automatically at checkout" (selected), "Automatically when the entire order is fulfilled", and "Manually". Each option has a descriptive sub-text. The second section is titled "Manual payment methods" and contains the text "Payments made outside your online store. Orders paid manually must be approved before being fulfilled". It includes a button with a plus icon and the text "Manual payment method".

Payment capture method
Payments are authorized when an order is placed. Select how to [capture payments](#):

- ☒ **Automatically at checkout**
Capture payment when an order is placed
- ☐ **Automatically when the entire order is fulfilled**
Authorize payment at checkout and capture once the entire order is fulfilled
- ☐ **Manually**
Authorize payment at checkout and capture manually

Manual payment methods
Payments made outside your online store. Orders paid manually must be approved before being fulfilled

[+ Manual payment method](#)

If you choose **Automatically at checkout** and click **Save**, your order will be captured immediately after authorisation.

If you choose **Automatically when the entire order is fulfilled** and click **Save**, your order will be captured once the order is fulfilled.

5.3 Order cancellation

You can cancel an order once it has been authorised. You cannot cancel an order if it has already been captured. Cancelling an order helps to avoid associated costs from refunding.

To access the cancel option, click the “More actions” option at the top of the order details page:

← #1007 Authorized Unfulfilled Restock Edit Print More actions < >

18 September 2024 at 13:46 from Online Store

Test order

Your payment gateway is in test mode.

[View payment settings](#)

Unfulfilled (1)

Location
Snow City Warehouse

Delivery method
Standard International

The 3p Fulfilled Snowboard £2,629.95 × 1 £2,629.95
SKU: sku-hosted-1

[Request fulfillment](#)

Notes
No notes from customer

Customer
xxxxxx xxxxxxxx
No orders

Contact information
xxxxxx@xxxxxx.com
No phone number

Shipping address
xxxx xxxxxxxx
450 xxxxxxxxxxxxxx
San Francisco CA 94111
United States

Billing address
Same as shipping address

Authorized Expires on September 21, 2024

Subtotal	1 item	£2,629.95
Shipping	Standard International (0.0 lb: Items 0.0 lb, Package 0.0 lb)	£23.99
Total		£2,653.94

Once you click the **Cancel order** option, you'll see a pop-up confirmation screen, as below:

Cancel order #1007?

Void transactions

Void £2,653.94 GBP authorized
(Worldpay Credit Card Payments)

Reason for cancellation

Customer changed or canceled order

Staff note

Only you and other staff can see this note.

☒ Restock inventory

☒ Send a [notification](#) to the customer

[Keep order](#) [Cancel order](#)

Click the **Cancel order** button to send a cancellation request to Worldpay's middleware .

In the Worldpay public app admin account, all order-cancellation requests are collected by batch and sent to Access Worldpay for approval for every five minutes.

Once your cancellation request is approved by Access Worldpay, the order status is immediately updated, both in Worldpay's middleware, and in the Shopify Store admin.

If you have opted for the refund option, then the refund process will be initiated. You can also complete the refund process separately.

Order ID	Purchase Date ↑	Bill to Name	Email	Grand Total	Payment Method	Status	Action
defau-rMm5lfzS6ccqebWM7y4r0GFvT	18-09-2024 23:16:44	xxxx xxxxxxxx	xxxxxx@xxxxxx.com	GBP 2653.94	Direct	Sent for Cancellation	View


[← #1007](#) Canceled Voided Unfulfilled Archived Edit Print More actions < >

18 September 2024 at 13:46 from Online Store

Test order

Your payment gateway is in test mode.
[View payment settings](#)

Removed (1)

 **The 3p Fulfilled Snowboard** £2,629.95 × 1 £2,629.95
SKU: sku-hosted-1
• Restocked at Snow City Warehouse

Voided

Notes
No notes from customer

Customer
xxxxxx xxxxxxxx
No orders

Contact information

Additionally, you can check the order status in the Shopify payment app. Go to **Portal/Orders/Open your cancelled order**.

Order Information

Order Date: 16-09-2024 23:16:44

Payment Method: Direct

Order Status: Sent for Cancellation

Order Type: Test Order

Merchant Name: Sapient Demo

Merchant Entity Reference: xxxxxxxxxxxx

Shopify Store URL: xxxxxx-xxxx.myshopify.com

Shopify Payment ID: xxxxxxxxxxxxxxxxxxxxxx

Shopify GID:
gid://shopify/PaymentSession/xxxxxxxxxxxxxxxxxxx

Payment Capture: Manual

Account Information

Customer Name: xxxx xxxxxxxx

Email: xxxxxx@xxxxxx.com

Phone No:

5.4 Order refund

You can only refund an order once it has been captured. To start a refund, click on **Refund option** at the top of the order details page:

← #1008

Paid Unfulfilled

Refund Edit Print ▾ More actions ▾

18 September 2024 at 13:52 from Online Store

⚠ Test order

Your payment gateway is in test mode.

View payment settings


After you have clicked the **Refund** option you will see the page below:

← Refund

#1008

Unfulfilled

Shop location

 The Collection Snowboard: Liquid
£749.95 × 1

0 / 1

£0.00

Refunded items will be removed from the order

Reason for refund

Only you and other staff can see this reason

Summary

No items selected.

Refund amount

Worldpay Credit Card Payments
(**** 4444)

£ 749.95

£749.95 available for refund

☒ Send a [notification](#) to the customer

Notification will be sent after the refund is processed





Refund £749.95

Once the refund request has been submitted, it is sent to the Worldpay middleware. You can see the refund request status in the order details page:

Timeline

Wf

Leave a comment...

Post

Only you and other staff can see comments

Today


A £749.95 GBP refund is pending. >

Just now

In the Worldpay middleware, we collect all refund requests by batch and send them to Access Worldpay for refund approval every five minutes.


Once your refund request is approved by Access Worldpay, we will immediately update the order status in the Worldpay's middleware and in the Shopify store admin:





Order ID	Purchase Date ↑	Bill to Name	Email	Grand Total	Payment Method	Status	Action
defau-r9dwN43oAX35t9RZjz9ZuXWXB	18-09-2024 23:22:33	xxxxxx xxxxxxxx	xxxxxx@xxxxxx.com	GBP 749.95	Direct	Sent for Refund	View

 Refunded

Original order	September 18, 2024	£749.95
Subtotal	1 item	£749.95
Shipping	Standard (0.0 lb: Items 0.0 lb, Package 0.0 lb)	£0.00
Total		£749.95
Paid		£749.95
Refunded	Reason: —	-£749.95
Net payment		£0.00

Timeline

 Leave a comment...

Post

Only you and other staff can see comments

Today

- Refund notification email was sent to xxxxxx xxxxxxxx (xxxxxx@xxxxxx.com). 1 minute ago
[View email](#)
- £749.95 GBP was refunded using a Mastercard ending in 4444. > 1 minute ago

You can also check the order status in the Worldpay middleware administration interface. Go to **Orders/Open your refunded order**.

Order Information	Account Information
Order Date: 18-09-2024 23:22:33	Customer Name: xxxxxx xxxxxxxx
Payment Method: Direct	Email: xxxxxx@xxxxxx.com
Order Status: Sent for Refund	Phone No:
Order Type: Test Order	
Merchant Name: Sapient Demo	
Merchant Entity Reference: xxxxxxxx	
Shopify Store URL: xxxxxxx-xxxxxx.myshopify.com	
Shopify Payment ID: xxxxxxxxxxxxxxxxxxxx	
Shopify GID: gid://shopify/PaymentSession/xxxxxxxxxxxxxx	
Payment Capture: Manual	

5.5 Order sync

Order status will be updated as per the cron frequency field configured in **Configuration/General/Cron Job Frequency**, as below:

OMS Cron Job Frequency *

Save

Every 5 Minutes

Select OMS Cron Job Frequency

Every 5 Minutes

Every 10 Minutes

Every 15 Minutes

Every 30 Minutes

Every 1 Hour

We recommend you set the frequency to “Every 5 minutes” if your order volume is high.

You can sync the order status between the Worldpay Merchant Administration Interface and the Worldpay middleware administration interface by clicking the **Order sync** button in the order detail page. Once you click the button, a confirmation pop-up will appear. If you select **OK** then the sync will go ahead and you’ll see a success message as below:

Order Sync Successfully

Back to Order

defau-xxxxxxxxxxxxxxxxxxxxxxxxxx(Total : GBP 749.95)

Order Sync

6. Cron job dashboard

You can track cron job activities for all payments in the Cron Job Dashboard:

Capture

3
Capture Request
Totally in store

LAST CRON EXECUTED AT
2024-09-18
07:20:47

NEXT SCHEDULE AT
0:03:12

Pending Request
0

As per the last executed Cron

Executed records	0
Resolve a payment	0
Reject a payment	0
Pending a payment	0
Failed request	0

Refund

1
Refund Request
Totally in store

LAST CRON EXECUTED AT
2024-09-18
07:20:48

NEXT SCHEDULE AT
0:03:12

Pending Request
0

As per the last executed Cron

Executed records	0
Resolve a Refund	0
Reject a Refund	0
Pending a Refund	0
Failed request	0

Cancel

2
Cancel Request
Totally in store

LAST CRON EXECUTED AT
2024-09-18
07:20:49

NEXT SCHEDULE AT
0:03:11

Pending Request
0

As per the last executed Cron

Executed records	0
Resolve a cancel request	0
Reject a cancel request	0
Pending a cancel request	0
Failed request	0

7. Troubleshooting with logs

We capture all transactions in logs for debugging purposes. You can see them in the Worldpay middleware Admin account by clicking **Logs** in the left-hand menu.

The screenshot displays the Worldpay Admin interface for logs. It is divided into two main sections: 'Current Log' and 'Archive Logs'. Both sections have a table with 'Log' and 'Action' columns. The 'Current Log' section shows a single log entry 'live-fisworldpay' with 'View' and 'Download' buttons. The 'Archive Logs' section shows five log entries with dates, each with 'View' and 'Download' buttons. A note at the bottom right states: 'After six months log will be deleted automatically.'

Log	Action
live-fisworldpay	View Download

Log	Action
live-fisworldpay_2022-12-31.log	View Download
live-fisworldpay_2022-12-19.log	View Download
live-fisworldpay_2022-12-07.log	View Download
live-fisworldpay_2022-04-19.log	View Download
live-fisworldpay_2022-04-04.log	View Download

After six months log will be deleted automatically.

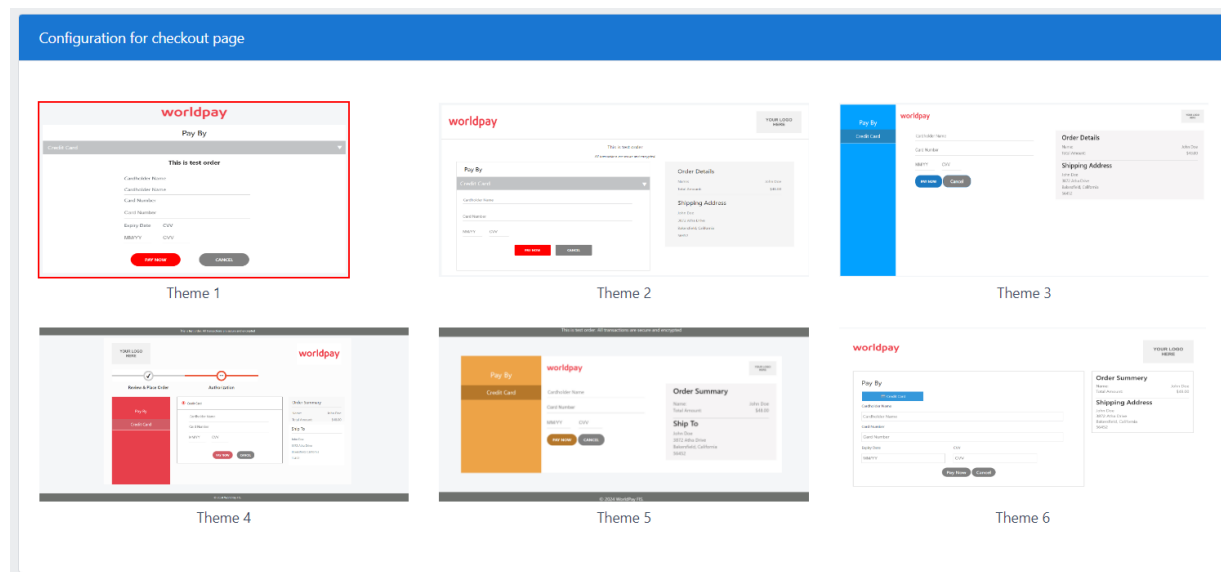
In the **Current Log** section, the log file holds recent transactions. You can read and download the requests and responses from Shopify and Access Worldpay.

In the **Archive Log** section, the log files hold old transactions. They are listed chronologically. You can read and download the requests and responses from Shopify and Access Worldpay.

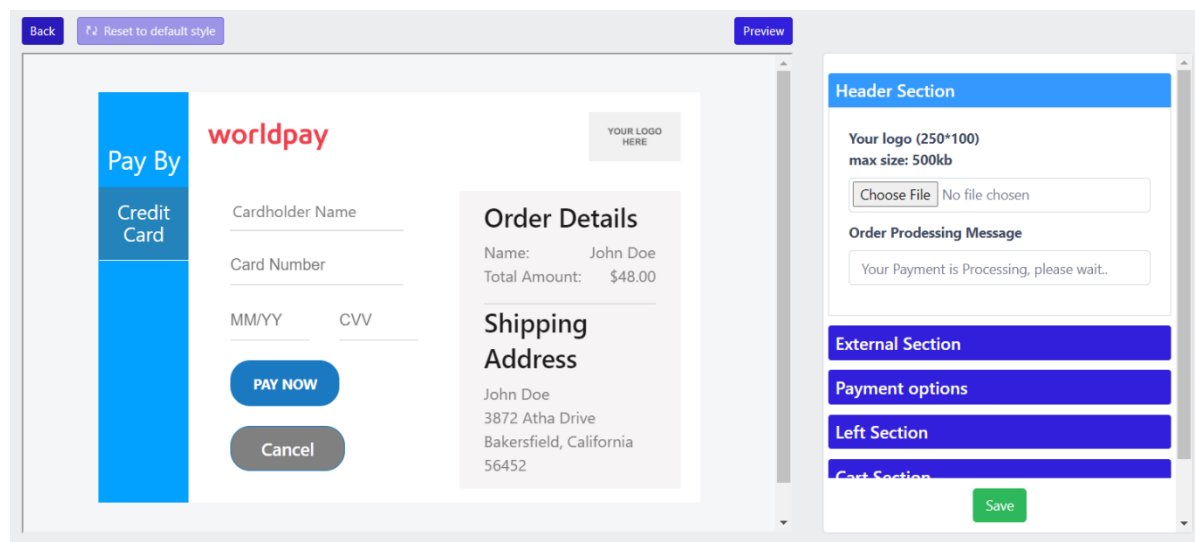
We do not capture any details about users' credit cards.

8. Checkout theme personalisation

You can personalise your checkout page to your requirements. There are six different themes you can select and configure it to your needs.



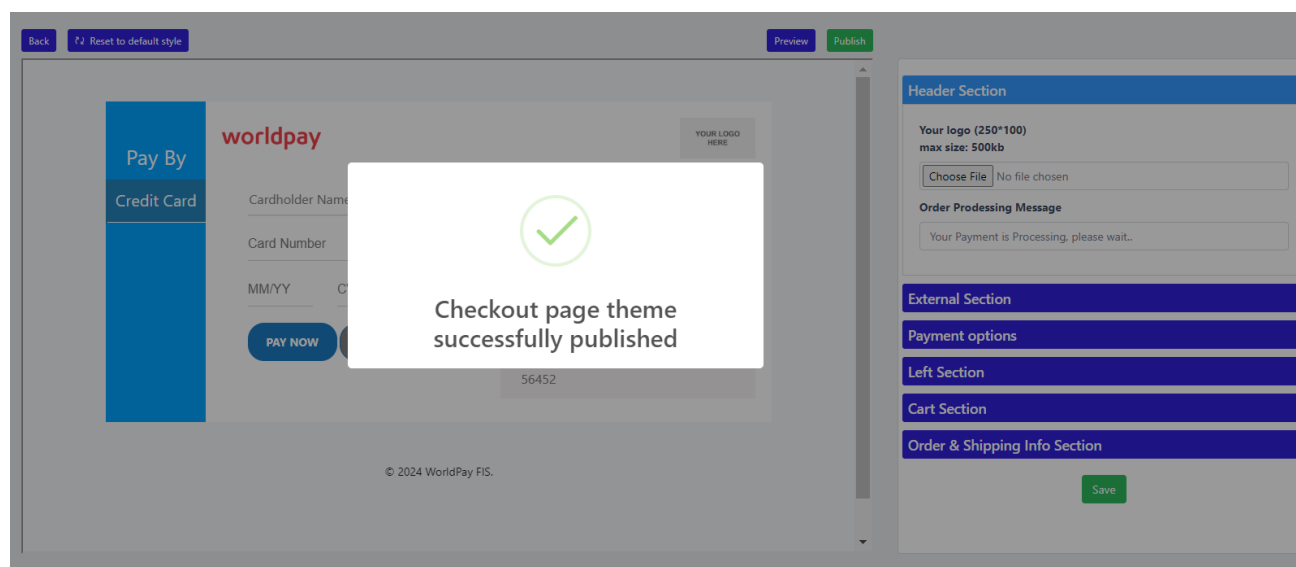
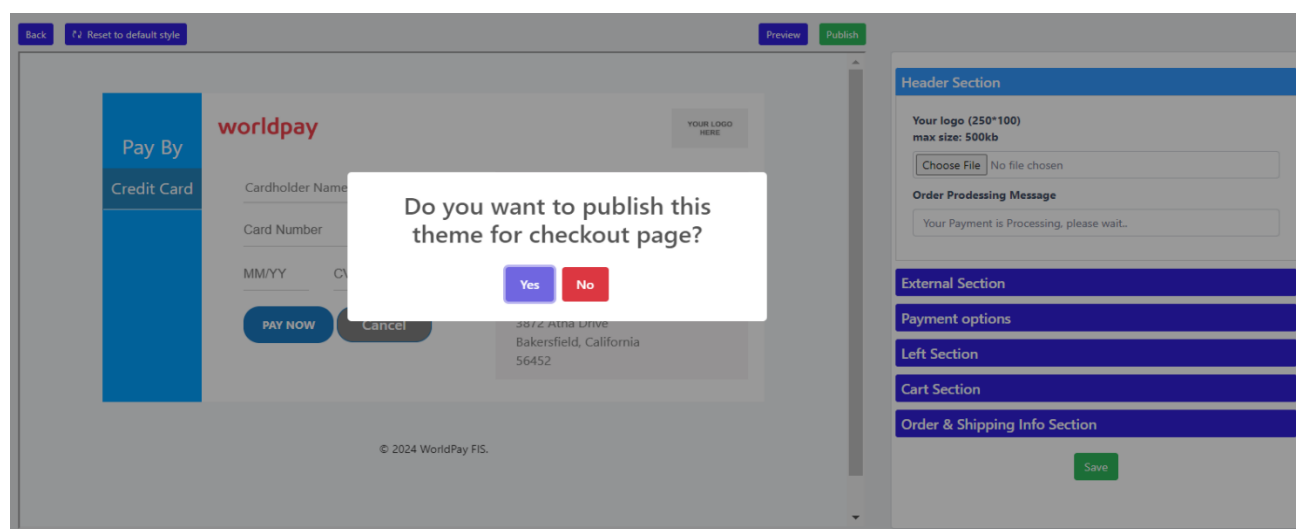
When you open a theme, you'll see a configuration page, as below:



You can customise your store logo, change the background colour and alter the in-text content using the field forms on the right-hand side. You must save changes before you can see a preview of your new checkout page. However, you cannot modify or remove the Worldpay logo.

The theme must be published before going live. You can reset the theme configuration to default by clicking the **Reset to default** button in the left-side top corner.

You can publish your theme by clicking the **Publish** button in the right-side top corner. A pop-up success message will appear as below:



9. Worldpay API security alerts

This feature enables you to receive API security alerts and report incidents to Worldpay.

To enable this feature, log in to the Worldpay middleware administration interface and go to [Configuration/Worldpay API security alerts](#):

Worldpay API security alerts

PLEASE FILL OUT ALL FIELDS MARKED BY(*)

Enable Worldpay Security Alerts

Yes

This feature enables you to receive the API security alerts and report the incident to Worldpay (if set to "Yes" below).

Recipient Email(s) *

xxxx@xxx.xcom, xxxxxxx@xxxx.com

Multiple emails can be added using comma seperated(i.e abc@example.com,xyz@example.com)

Do you want to report the error(if appears) to worldpay?

Yes

Note: If set to "Yes", this setting will send the security incident report to Worldpay.

Worldpay Team Email

paymentsxxxxxxxxxxxx@xxxxxxxx.com

Save

Security alert configuration	Description
Enable Worldpay Security Alerts	Yes: Will enable security alerts settings No: Will disable security alerts settings
Recipient Email(s)	Comma-separated email addresses to be notified
Do you want to report the error (if it appears) to Worldpay?	Yes: Will enable reporting to Worldpay No: No report will be sent to Worldpay
Worldpay Team Email	Worldpay email address to receive the report email

10. Best Practices

1. One set of credentials can be configured for one website.
2. When switching websites, make sure there are no pending orders in sales or refund.
3. **Shopping address** is mandatory to complete the payment.
4. The Order Management System (OMS) processes (capture, cancel, and refund) should be performed only through the Shopify Admin panel.