worldpay

Shopify
Access Worldpay Direct checkout technical guide

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Version 1.3

Contents

1. Introduction 3
1.1 Overview of Worldpay plugin features 3
1.2 Prerequisites 3
1.3 How to get started 4
1.4 Basic configuration 4
1.5 Credit/debit card integration 5
2. Main configuration 6
2.1 The shopper's experience 6
2.1.1 Payment journey for shopper 7
3. 3DS2 authentication 8
3.1 Main 3DS2 configuration 9
3.2 Sample 3DS Flex challenge page 11
4. The retry policy 12
5. Order management 13
5.1 Manual order capture 13
5.2 Auto capture/settle 19
5.3 Order cancellation 21
5.4 Order refund 24
5.5 Order sync 27
6. Cron job dashboard 28
7. Troubleshooting with logs 29
8. Checkout theme personalisation 30
9. Worldpay API security alerts 31
10. Best Practices 33

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.

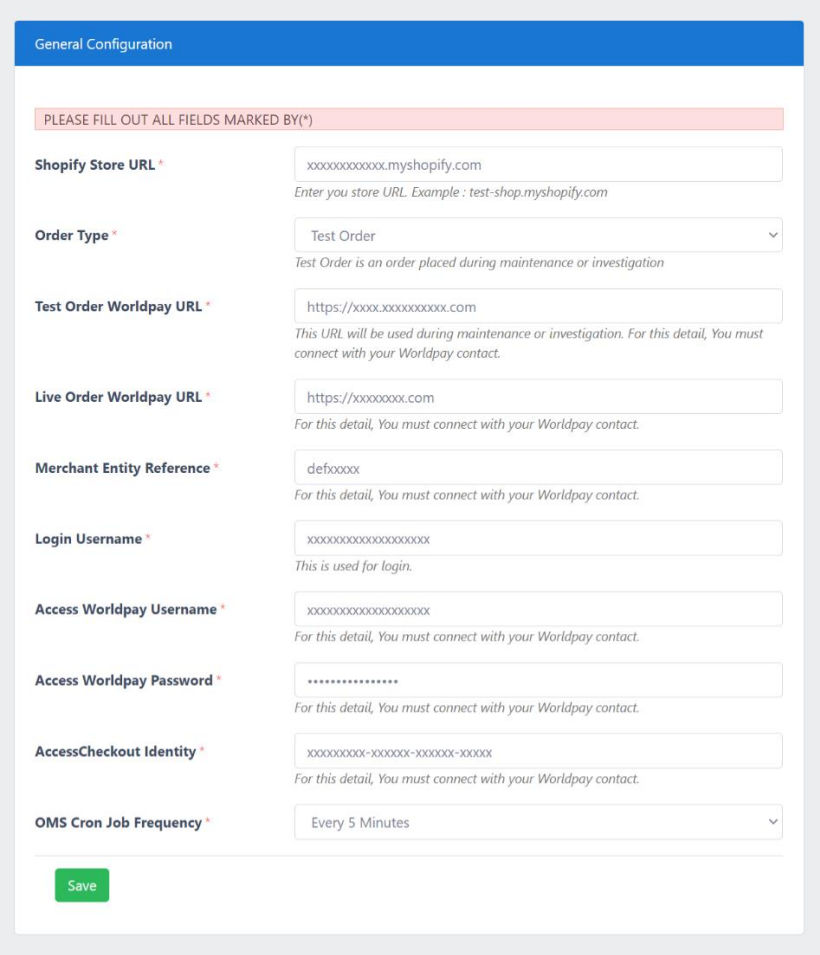
1.3 How to get started

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:



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

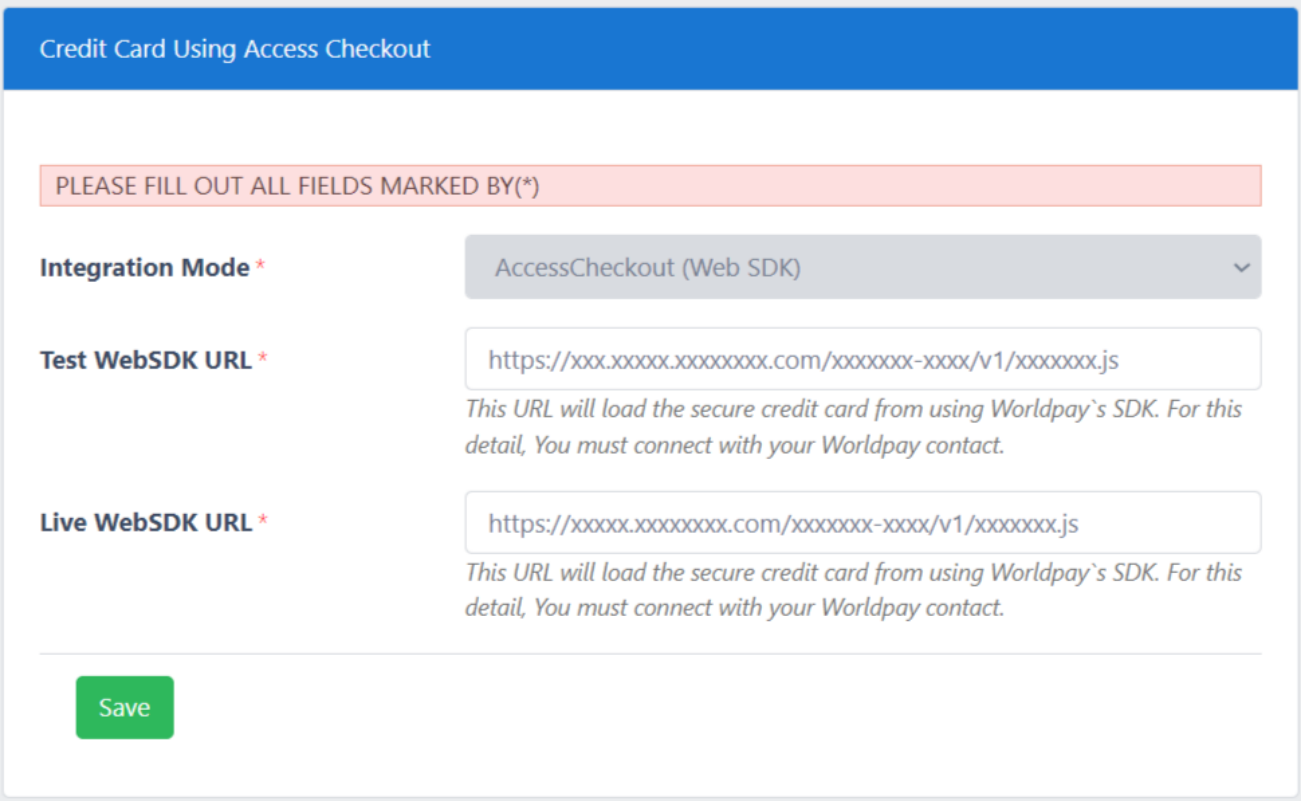
Once the basic configuration is completed, you must set up the AccessCheckout integration to begin accepting credit card payments. Details on this are in Section 2 of this guide, "Main Configuration".

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:



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

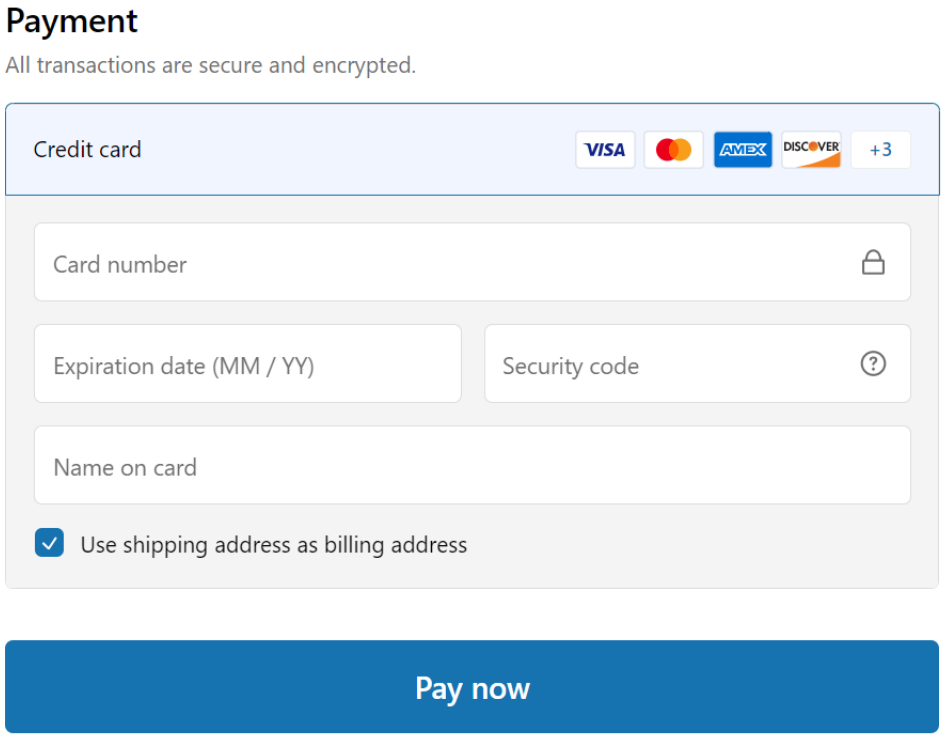
Credit card configuration	Description
Integration Mode	**AccessCheckout (Web SDK) integration mode** The shopper's card information is saved and captured at the Worldpay end. This integration qualifies for SAQ-A – the lowest PCI compliance level
Test WebSDK URL	This URL will load the secure credit card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

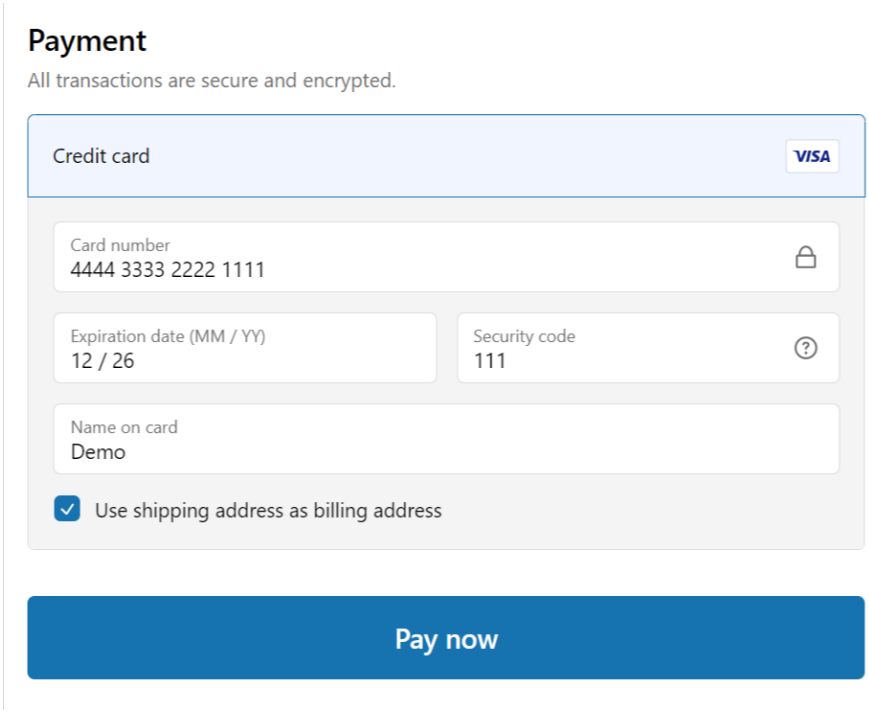
Shoppers can place an order using credit or debit cards on the Shopify store checkout page.

2.1.1 Payment journey for shopper

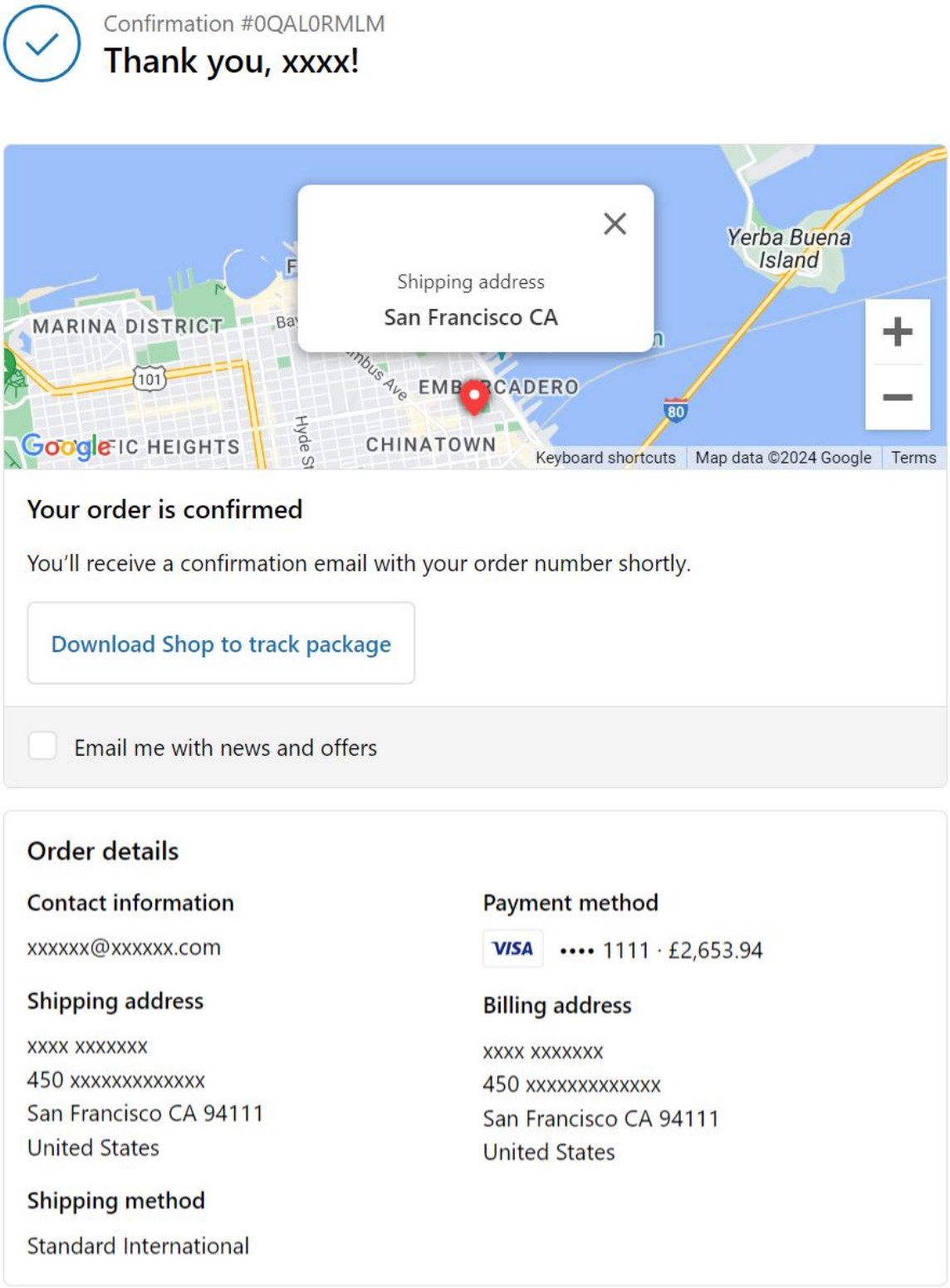
For a guest or registered shopper, the payment form appears as below:



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



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

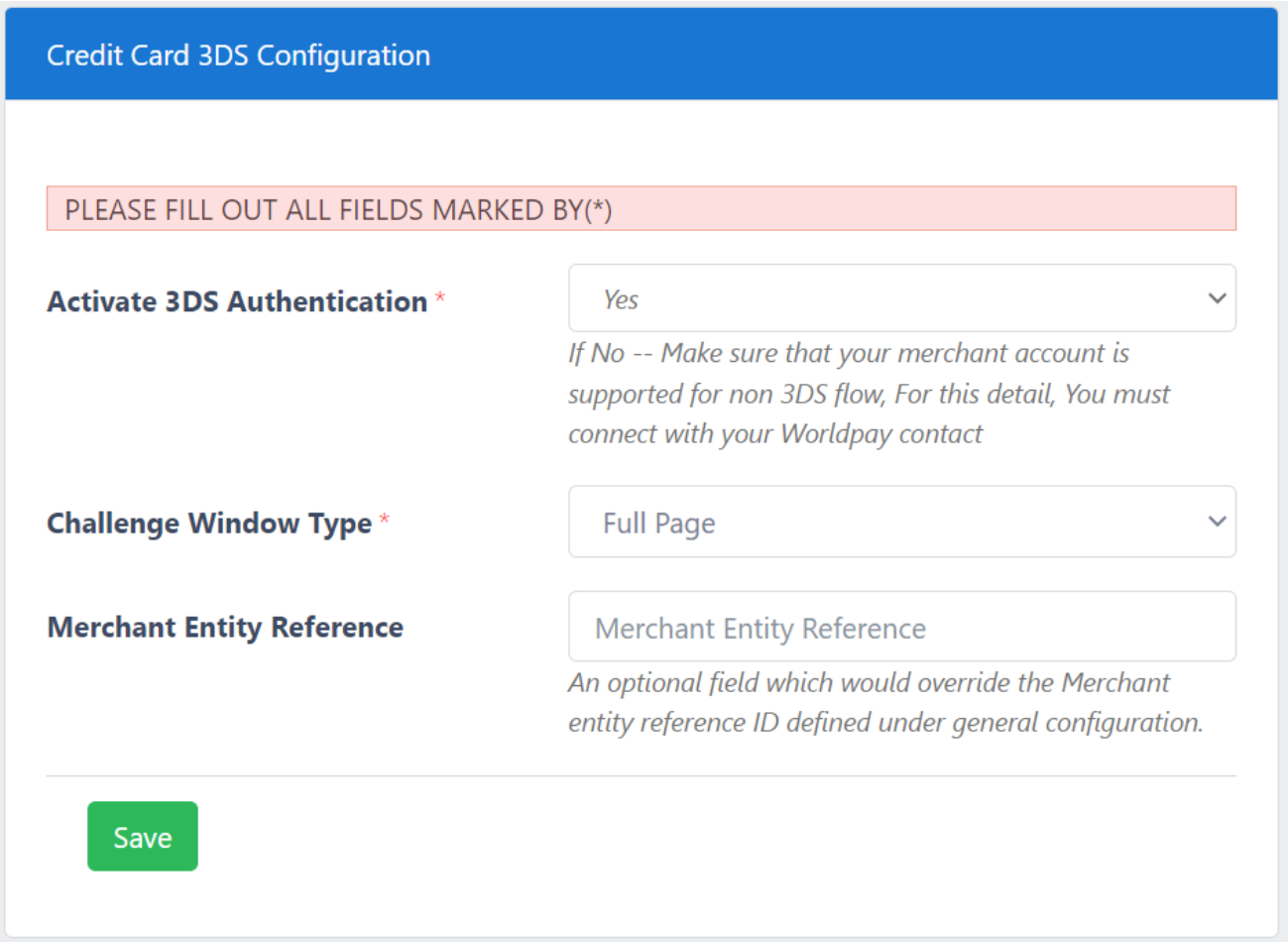


3. 3DS2 authentication

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.

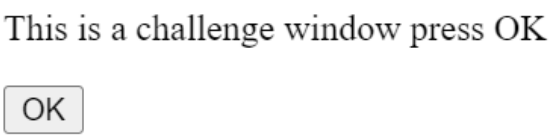
3.1 Main 3DS2 configuration

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.



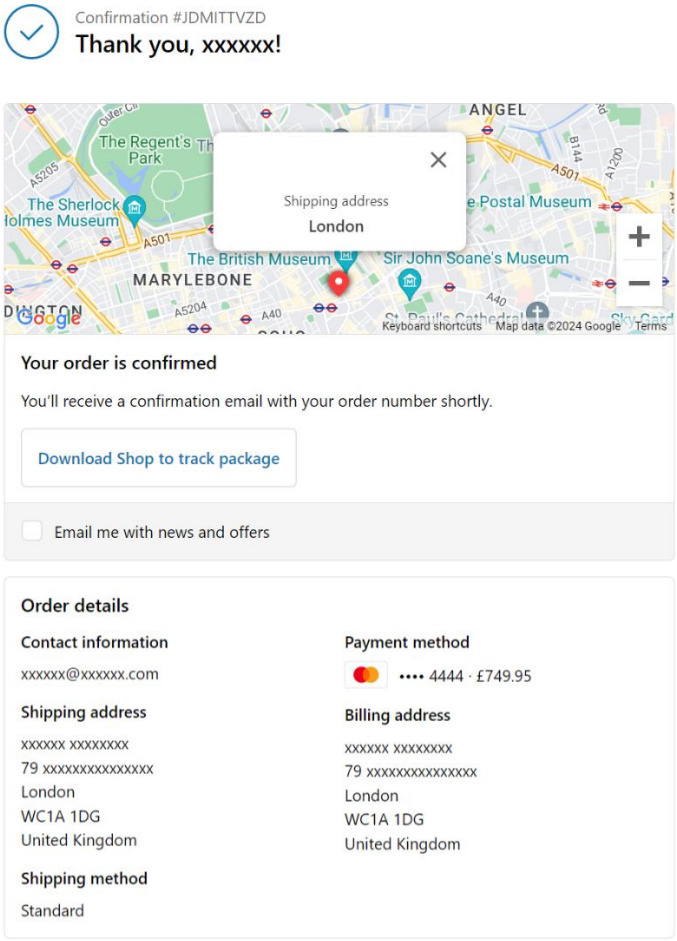
3DS Configuration	Description
Activate 3DS Authentication	**Yes:** Activate 3DS validation for the store **No:** Deactivate 3DS validation for the store
Challenge Window Type	Full page: This will render 3DS validation in a full-page window **Iframe:** This will render 3DS validation window in an iframe
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



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.

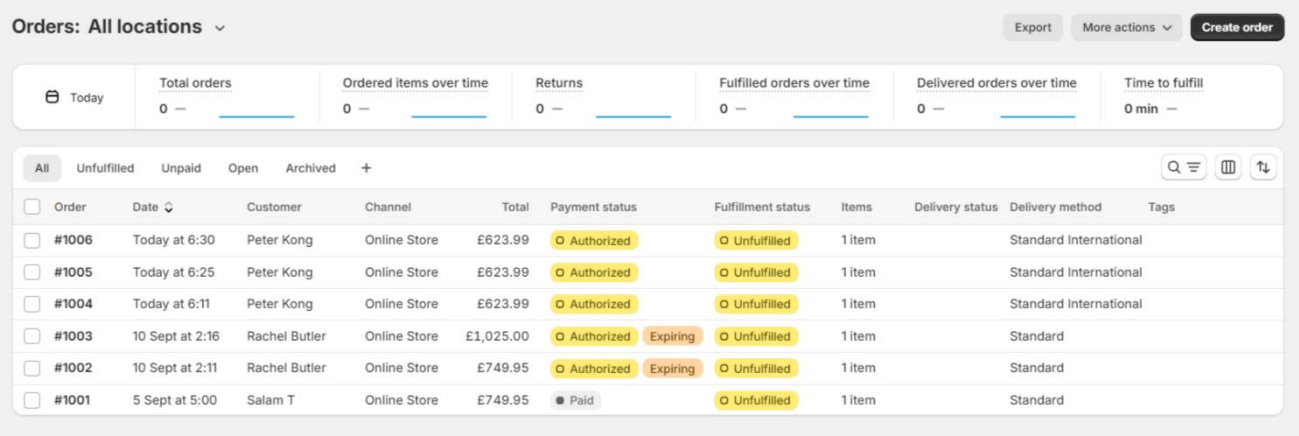
5. Order management

5.1 Manual order capture

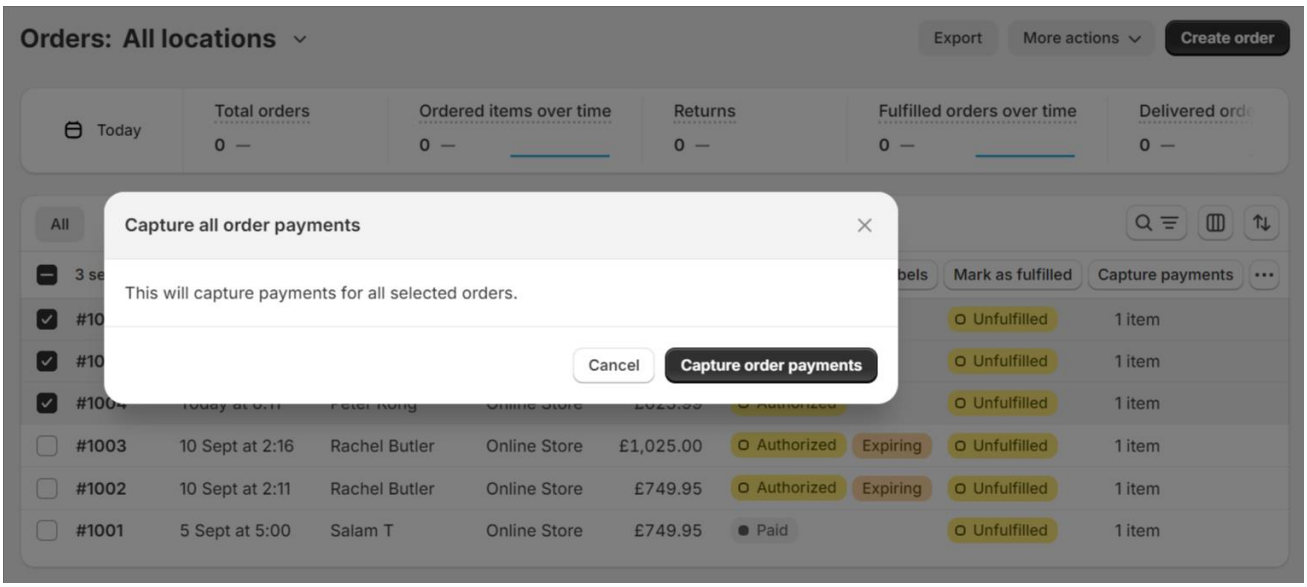
Once an order is authorised, you can use the Shopify Store Admin to manually complete the order capture.

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.

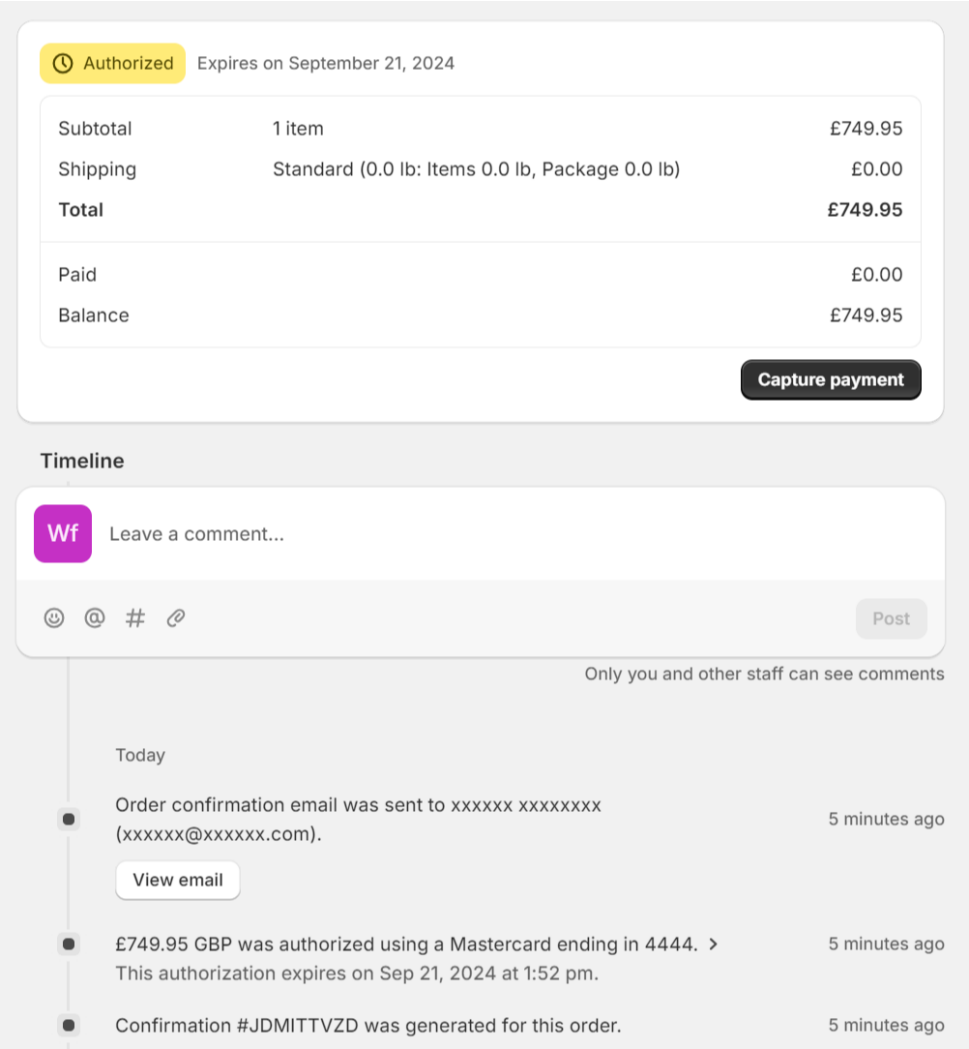
Note: *We strongly recommend you initiate the capture from the Shopify admin panel to ensure end-to-end synchronization. Currently, the Shopify capture process restricts the chance of initiating capture request from external applications.*



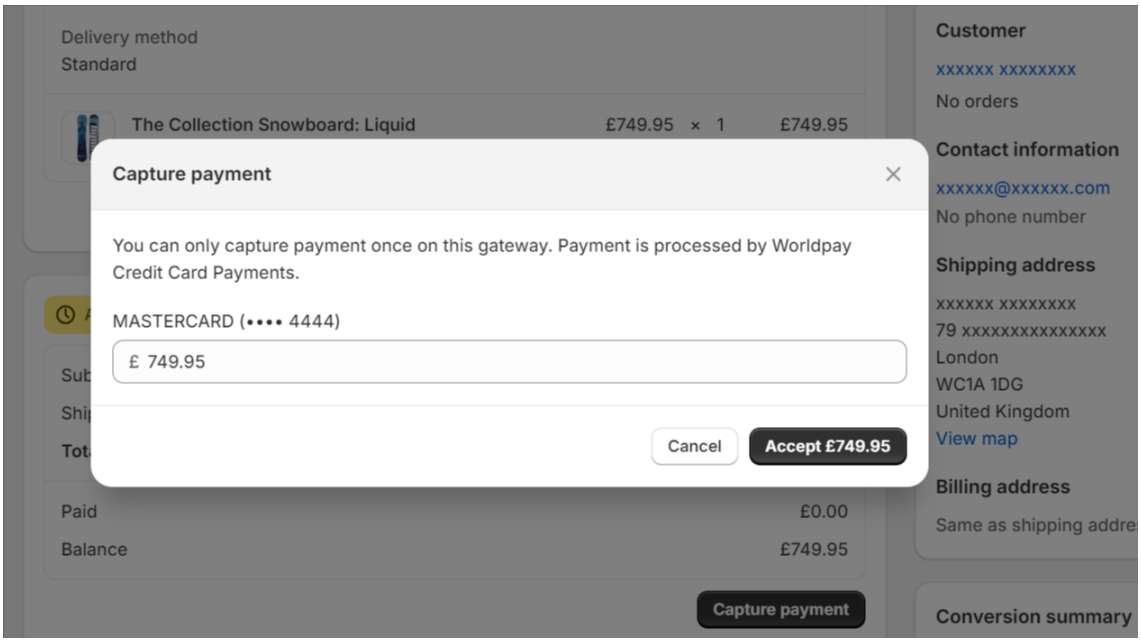
To send multiple capture requests, select the orders and click **Capture order payments** in the menu:



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

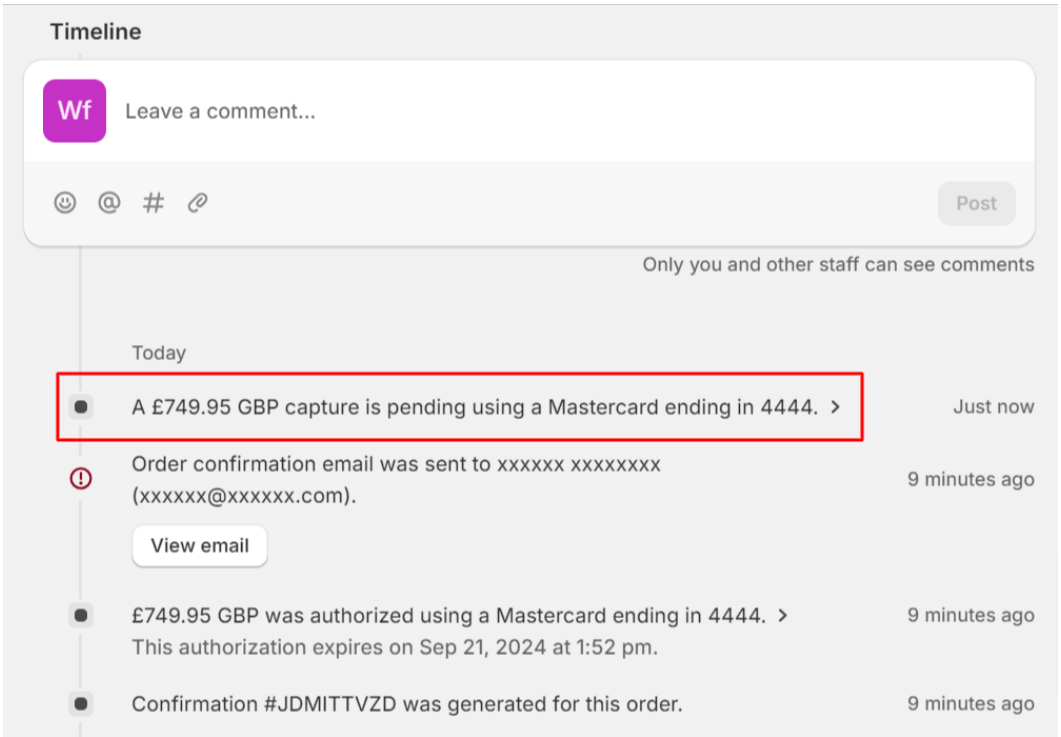


Once you click the **Capture payment**, button you need to wait for confirmation from the Worldpay apps admin account.

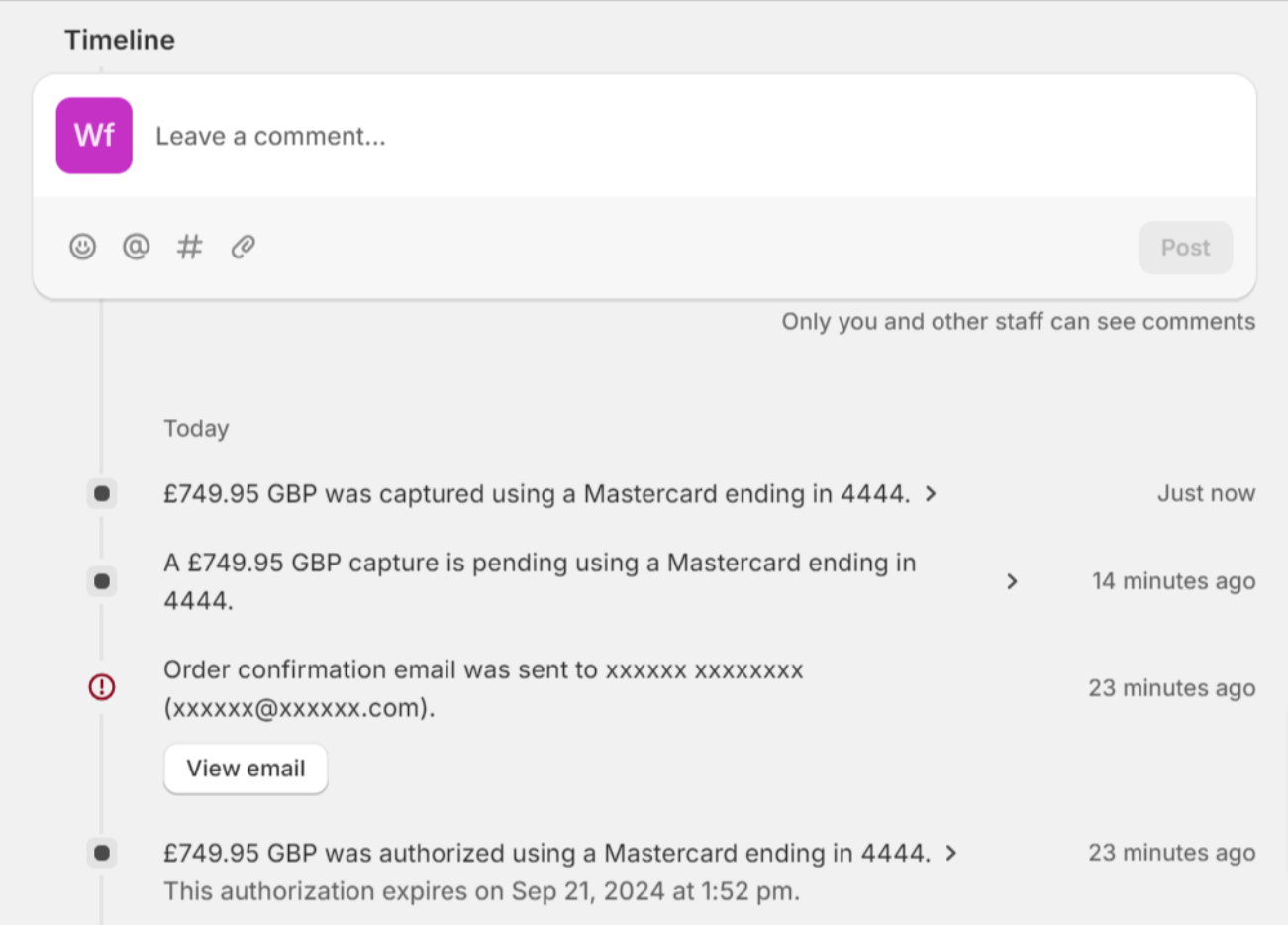


Once you accept the capture request, the request is sent to the Worldpay app's admin account. This is where we collect all capture requests by batch. These are sent for capture approval every five minutes.

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.



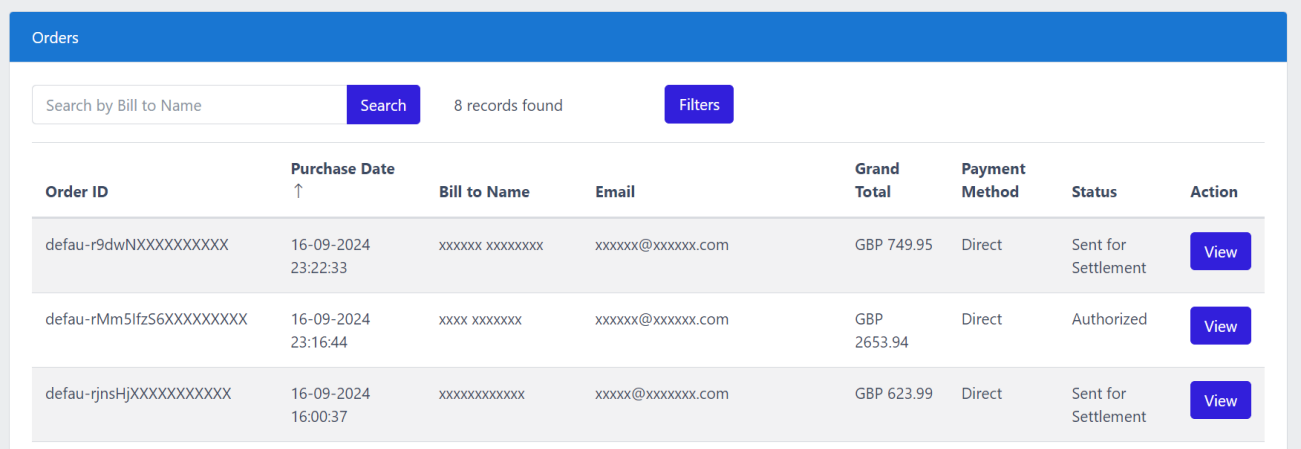
In the order timeline above, the capture request has been sent and is waiting for confirmation. Once a capture is complete, the order status appears as in the screenshot below:



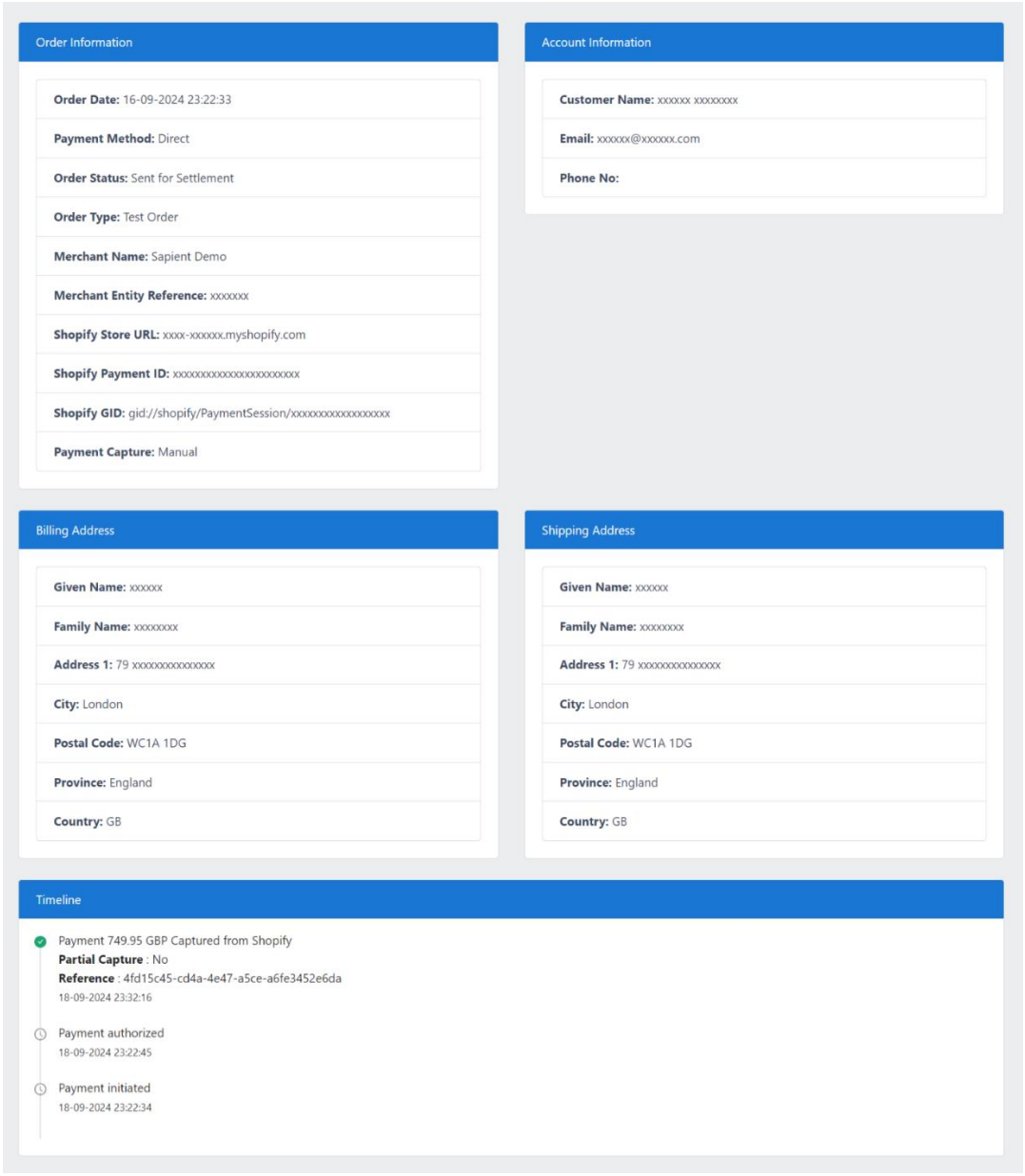
You can also see the order capture status (Sent for Settlement) in the Worldpay middleware. To do this, log in to your admin account and open the order:

Order ID	Purchase Date ↑	Bill to Name	Email	Grand Total	Payment Method	Status	Action
defau-r9dwN43oAX3XXXXXXXXXXXXX	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:**



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

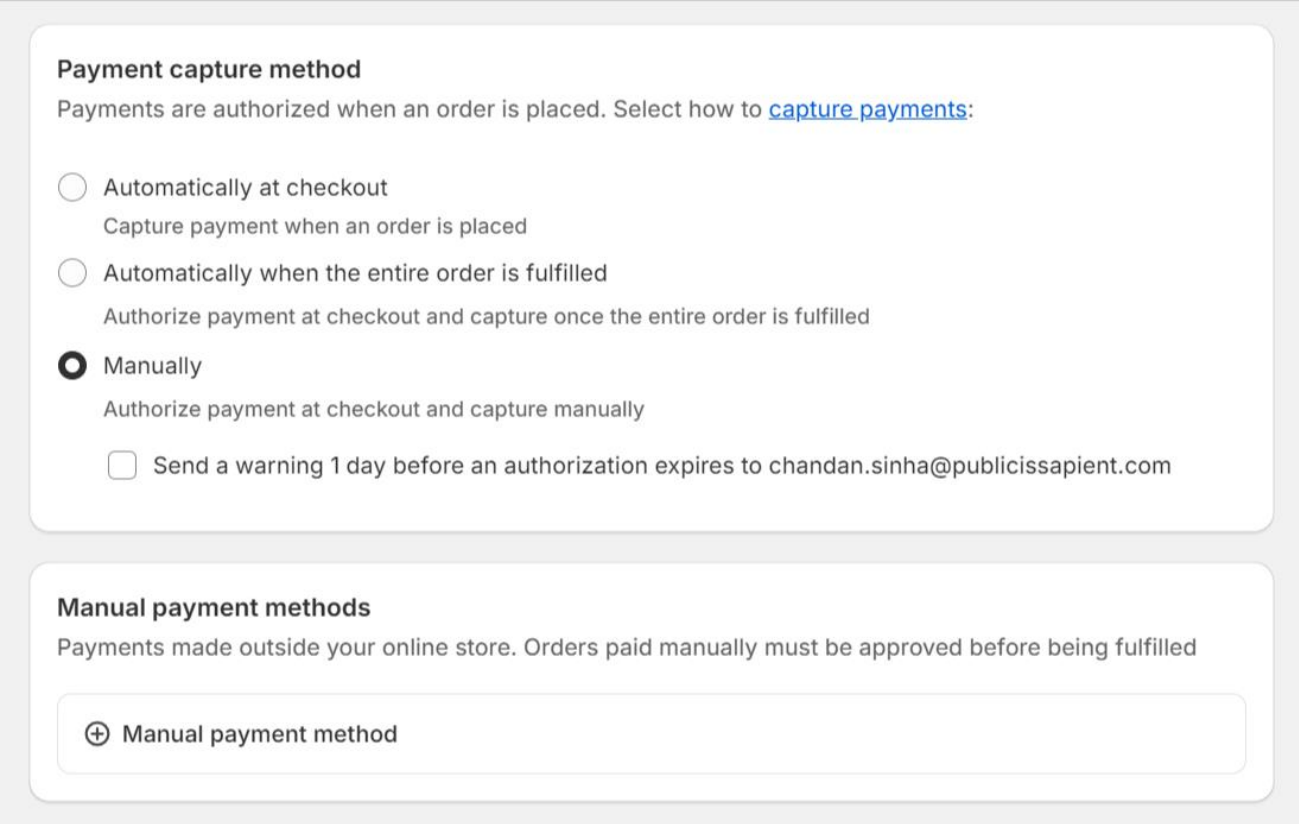


5.2 Auto capture/settle

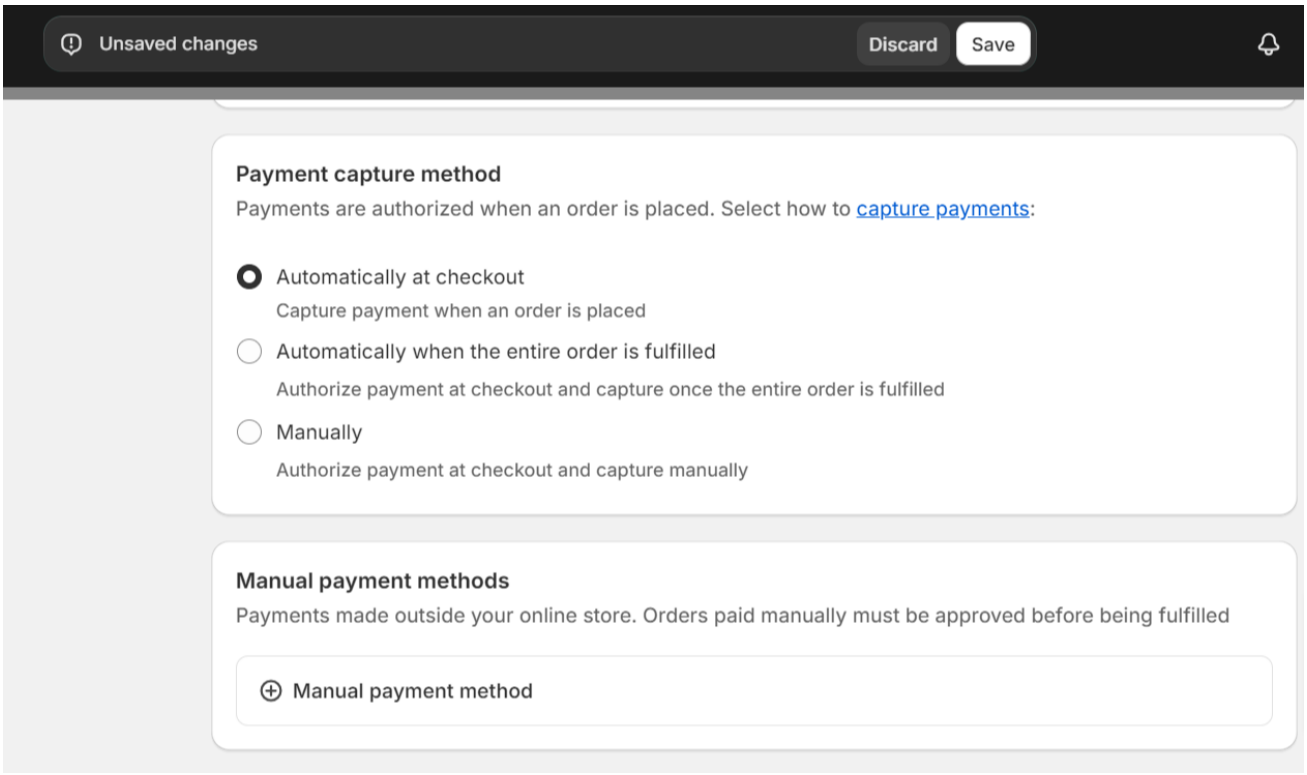
Note: *Before you start configuring the auto settlement feature in Shopify Store admin, please get in touch with your Worldpay technical representative to enable it on the AccessWorldpay gateway.*

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:



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:**



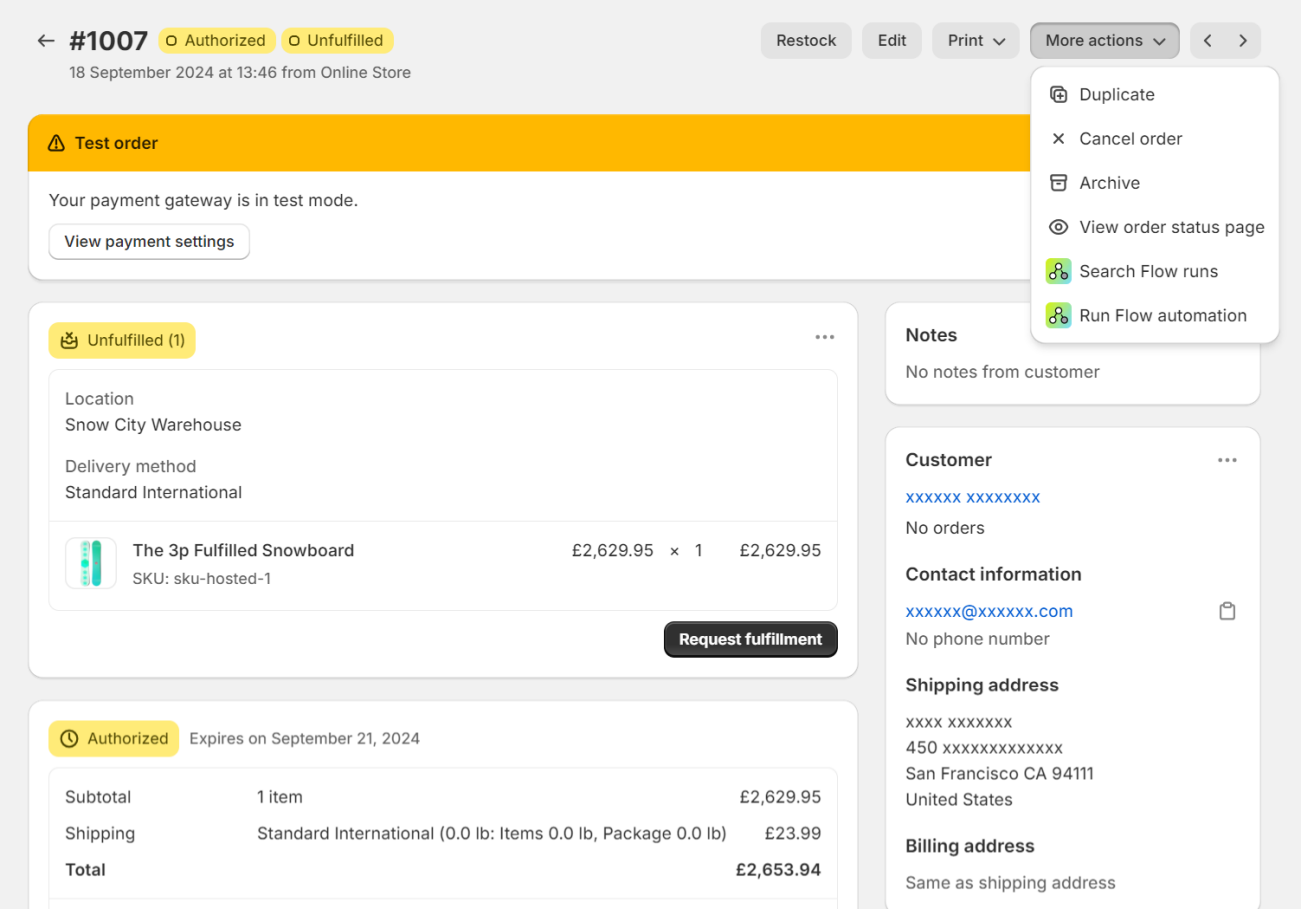
If you choose **Automatically at checkout** and click **Save,** your order will be captured immediately after authorisation.

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

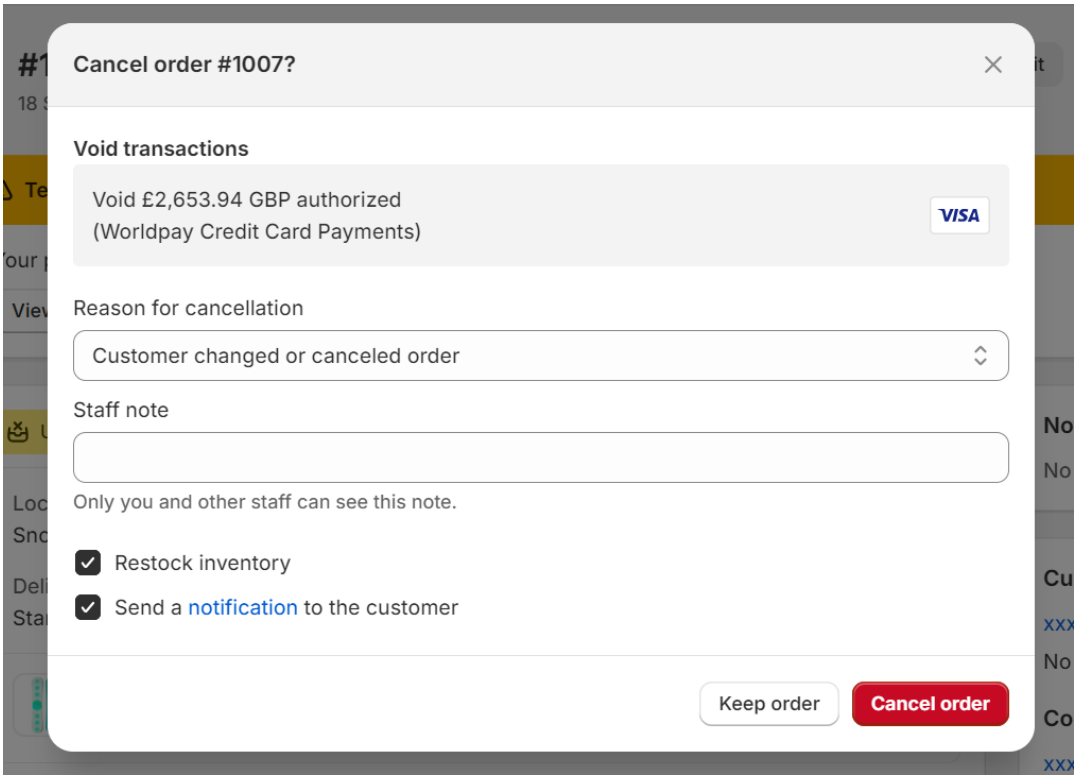
5.3 Order cancellation

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:



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



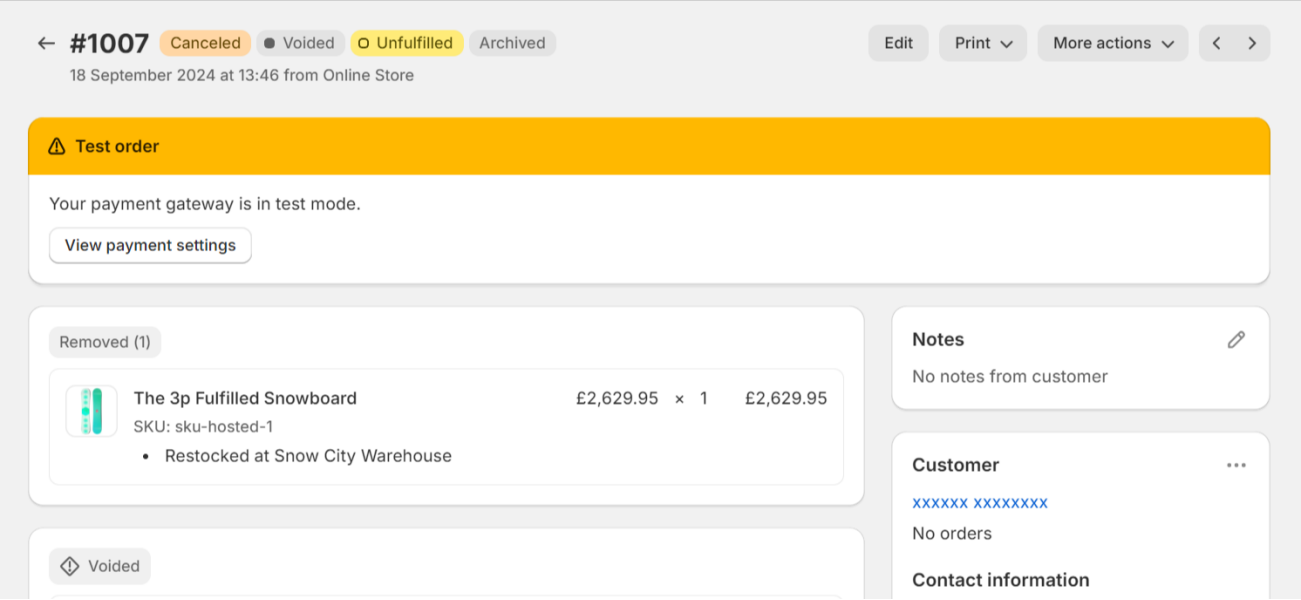
Click the **Cancel order** button to send a cancellation request to Worldpay's middleware .

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.

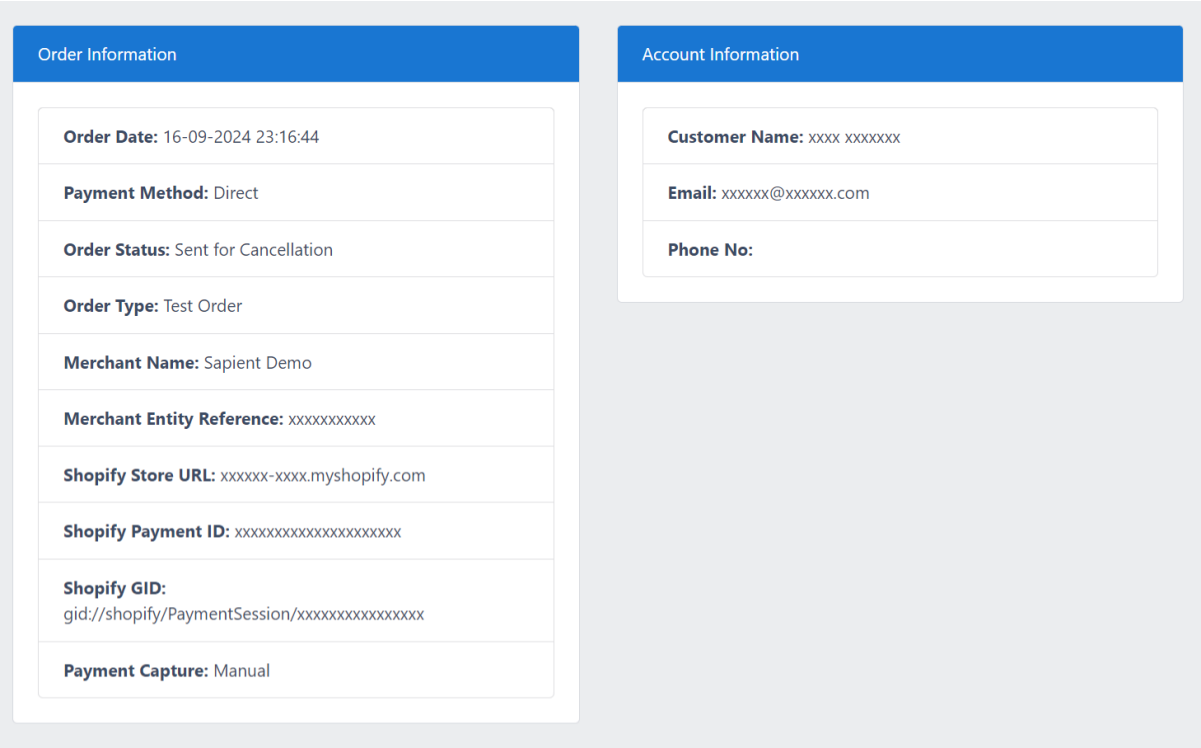
Once your cancellation request is approved by Access Worldpay, the order status is immediately updated, both in Worldpay's middleware, and in the Shopify Store admin.

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-rMm5IfzS6ccqebWM7y4r0GFvT	18-09-2024 23:16:44	xxxx xxxxxxx	xxxxxx@xxxxxx.com	GBP 2653.94	Direct	Sent for Cancellation	View

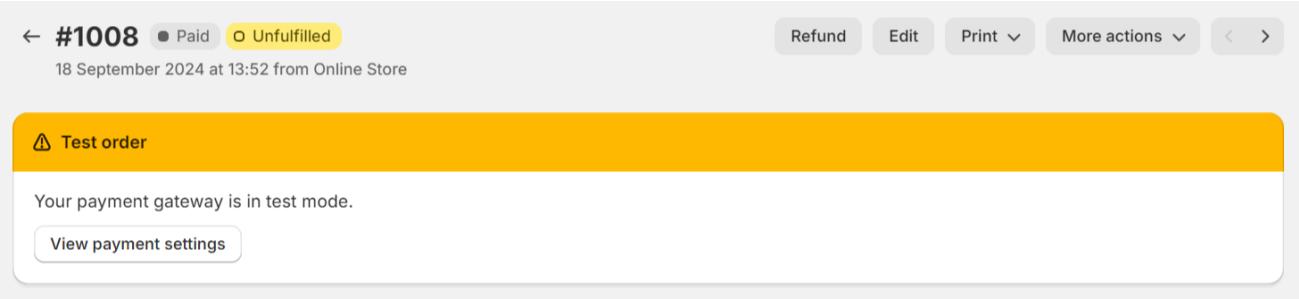


Additionally, you can check the order status in the Shopify payment app. Go to Portal/Orders/Open your cancelled order.

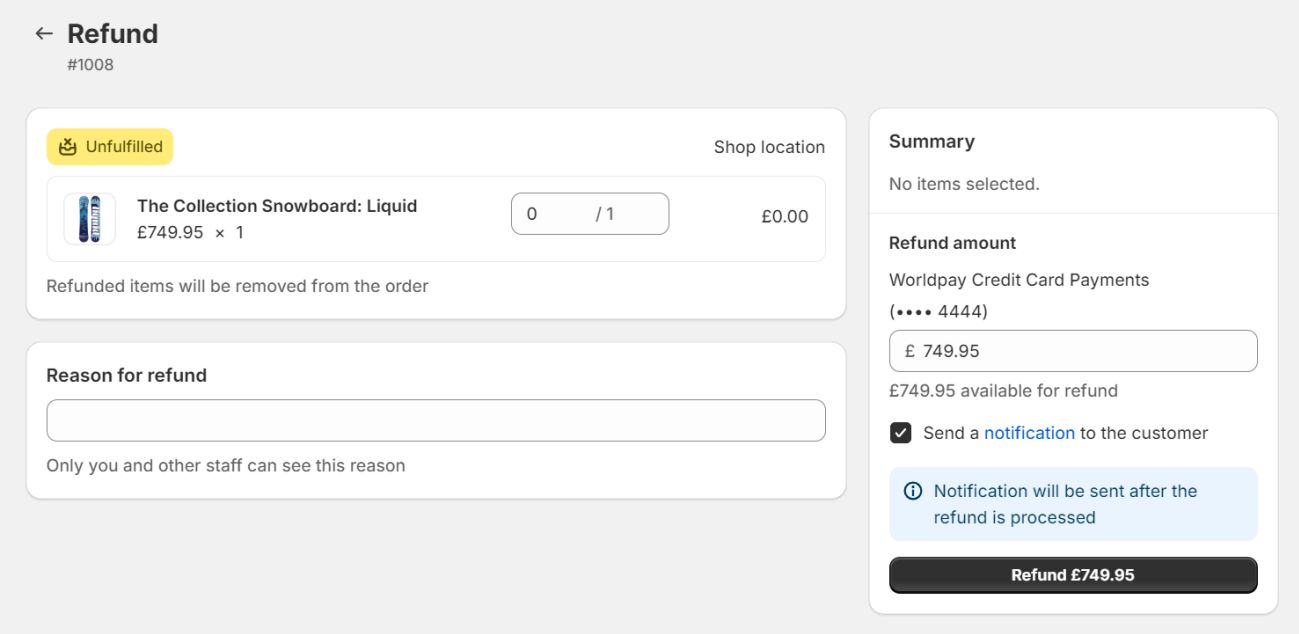


5.4 Order refund

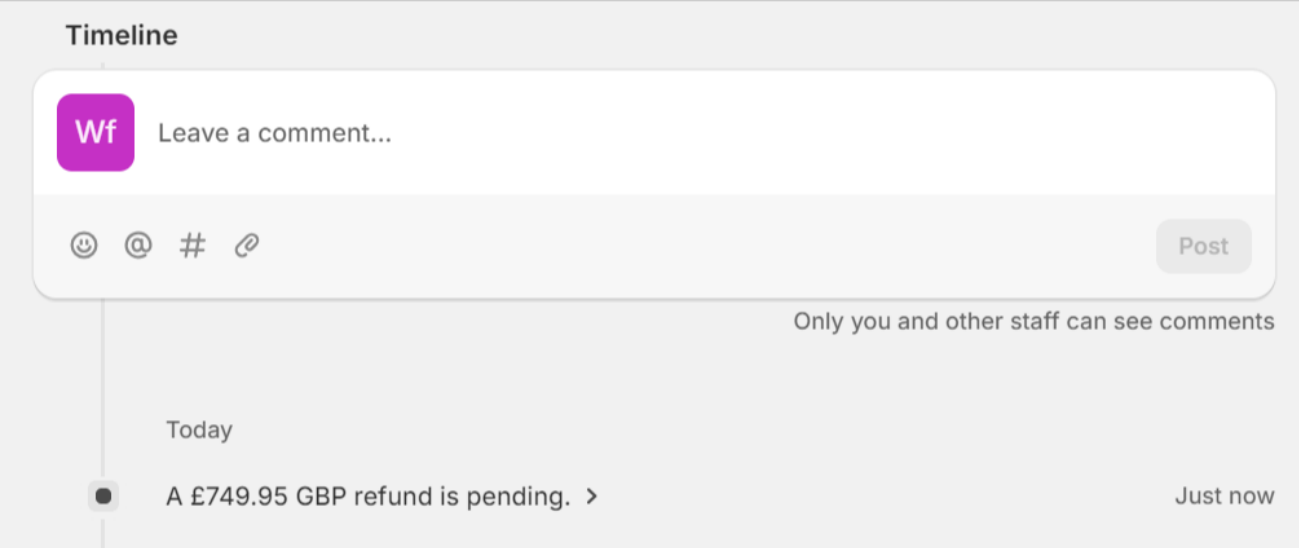
You can only refund an order once it has been captured. To start a refund, click on **Refund option** at the top of the order details page:



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

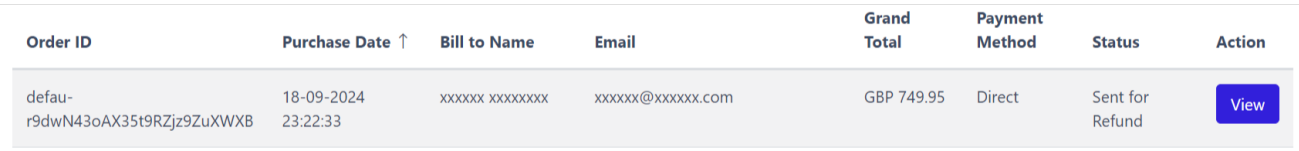


Once the refund request has been submitted, it is sent to the Worldpay middleware. You can see the refund request status in the order details page:

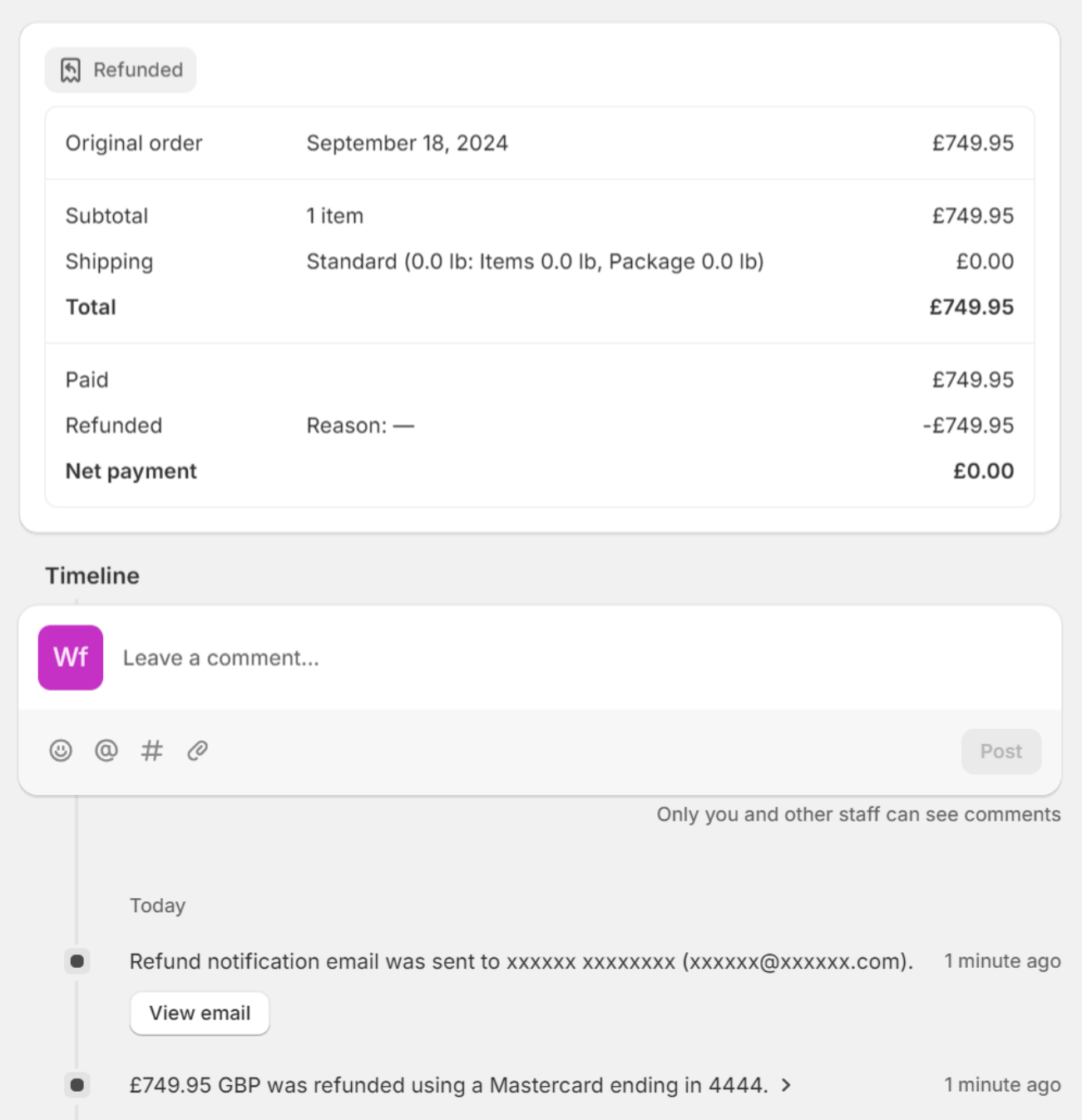


In the Worldpay middleware, we collect all refund requests by batch and send them to Access Worldpay for refund approval every five minutes.

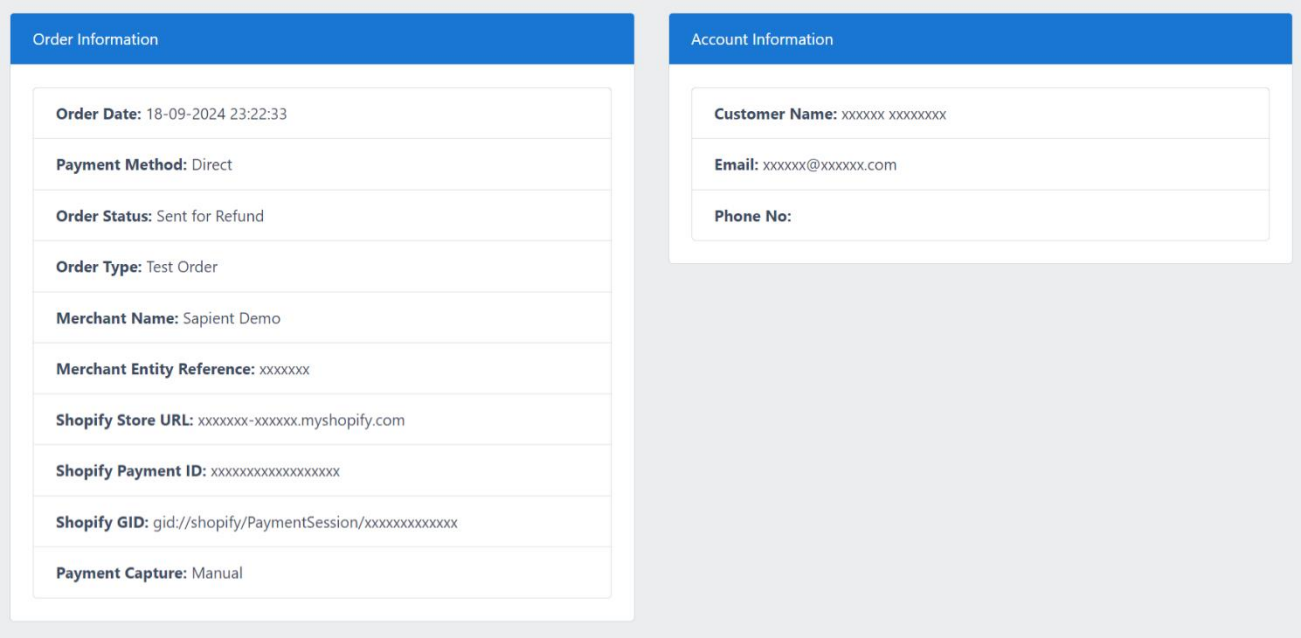
Once your refund request is approved by Access Worldpay, we will immediately update the order status in the Worldpay's middleware and in the Shopify store admin:



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

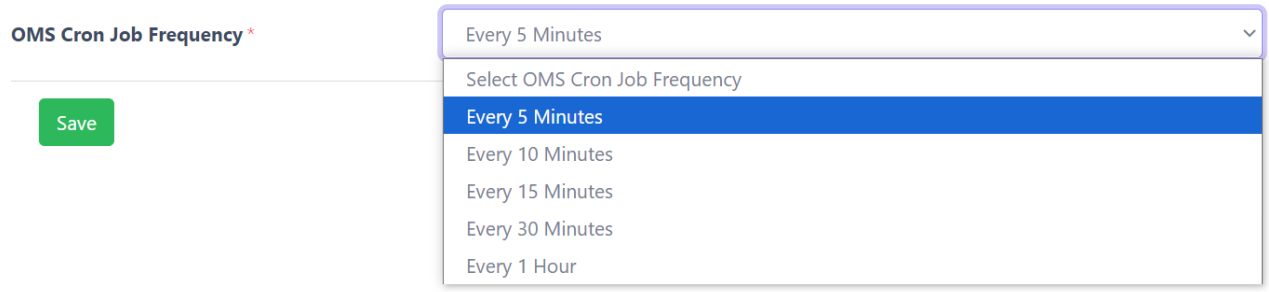


You can also check the order status in the Worldpay middleware administration interface. Go to **Orders/Open your refunded order.**



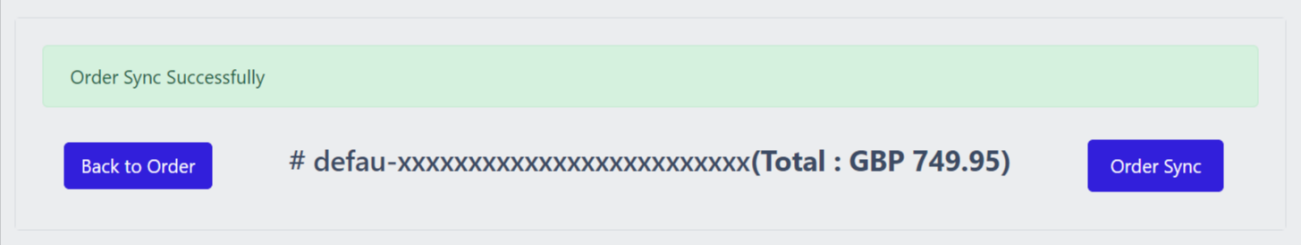
5.5 Order sync

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



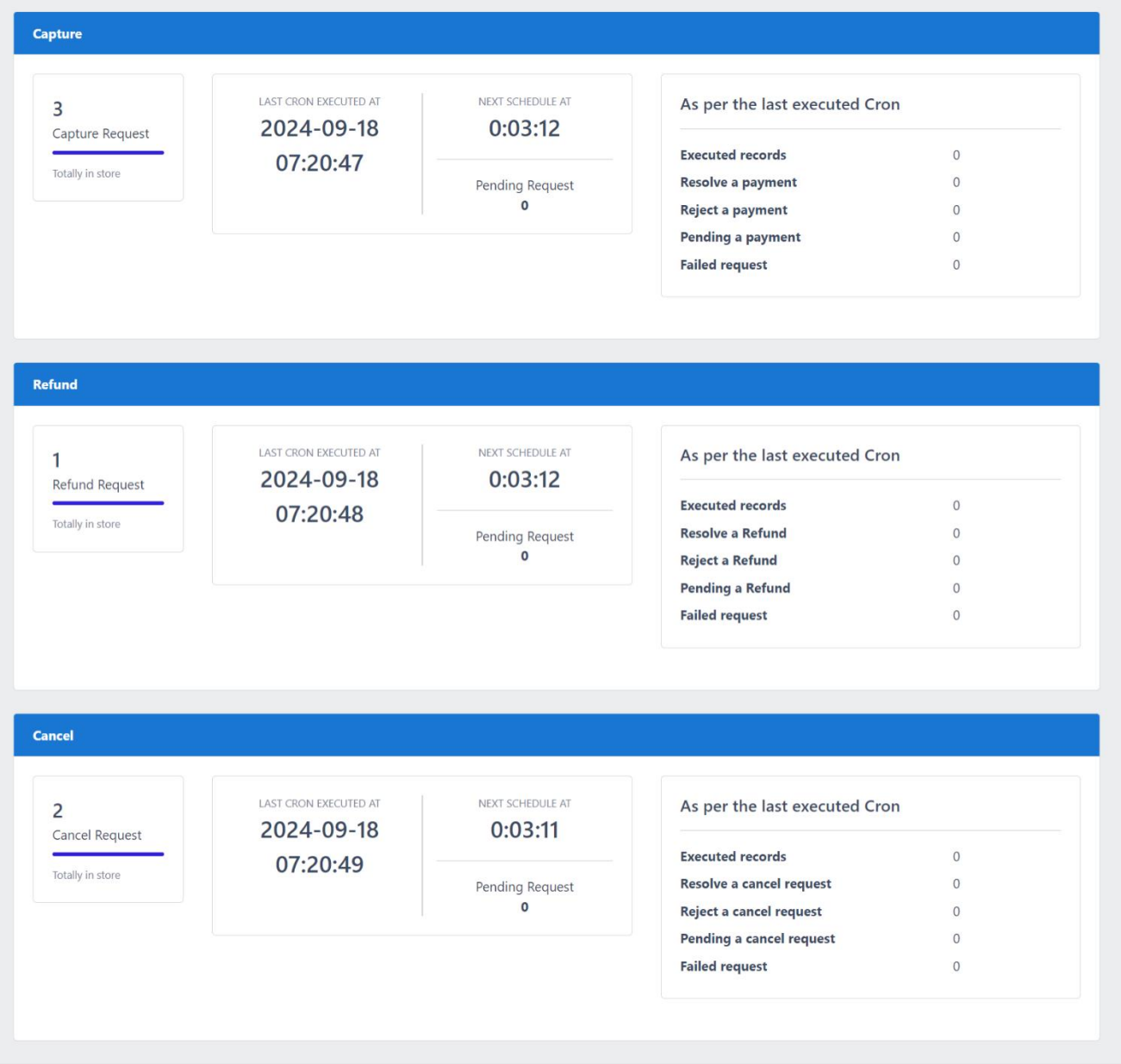
We recommend you set the frequency to “Every 5 minutes” if your order volume is high.

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:



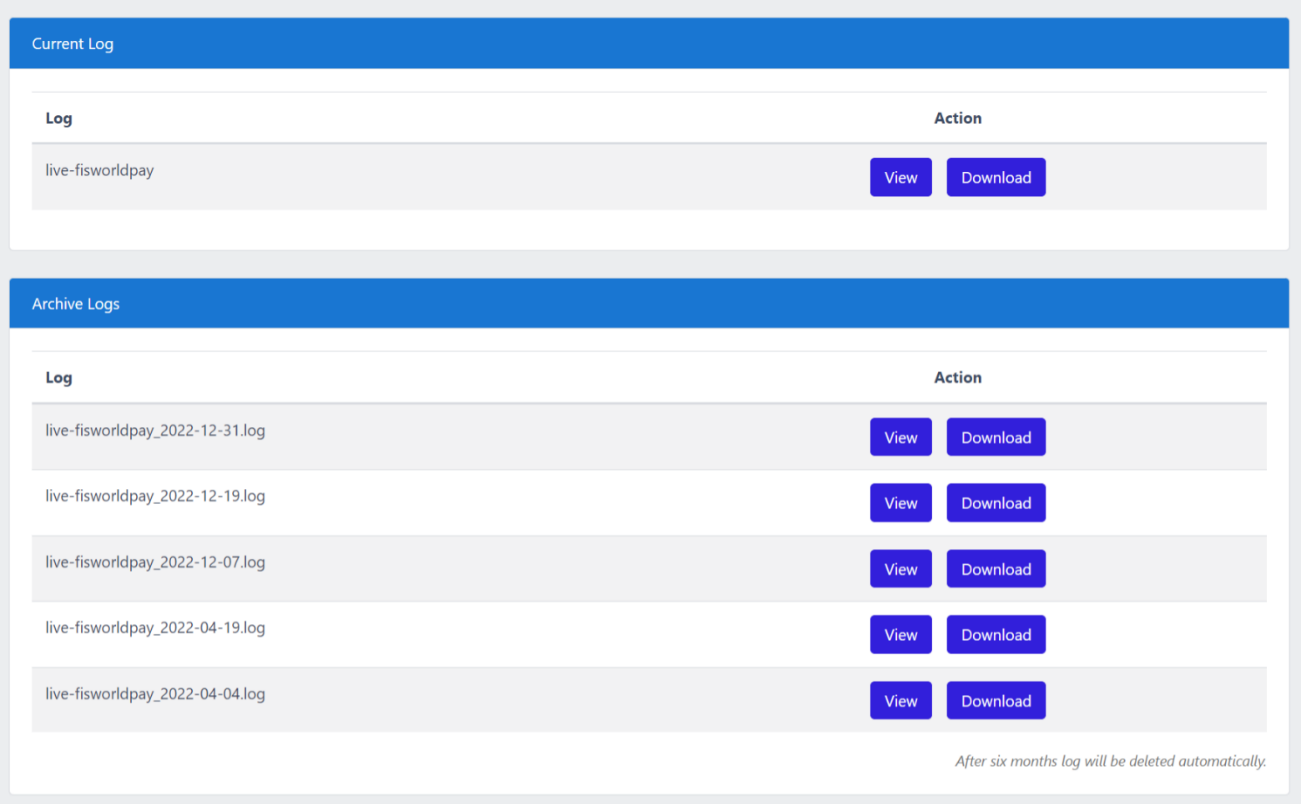
6. Cron job dashboard

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



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.



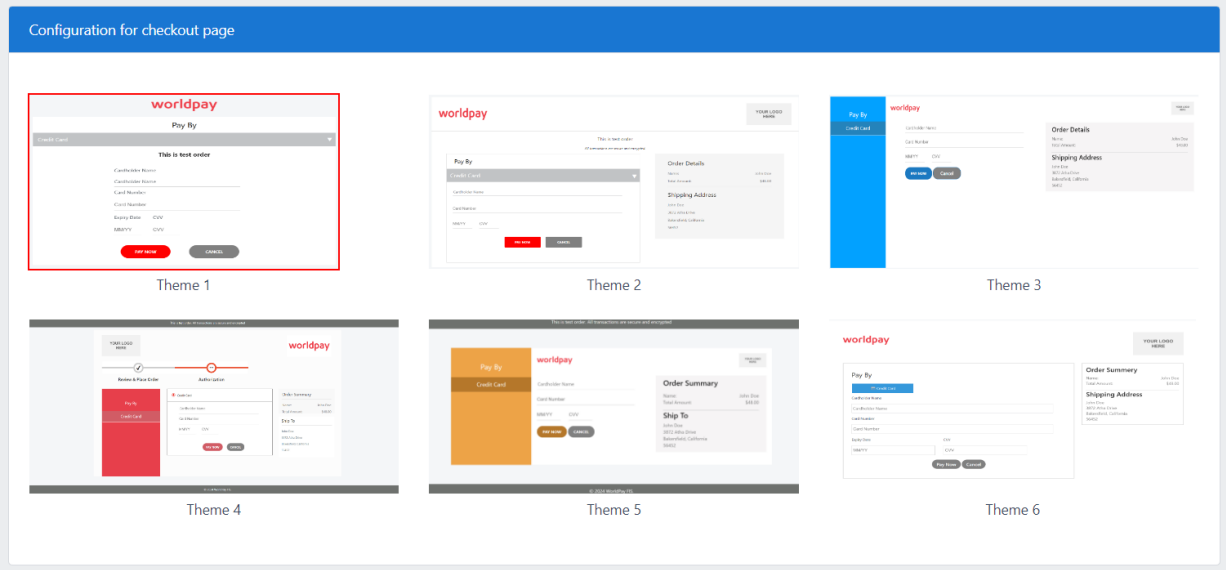
In the **Current Log** section, the log file holds recent transactions. You can read and download the requests and responses from Shopify and Access Worldpay.

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.

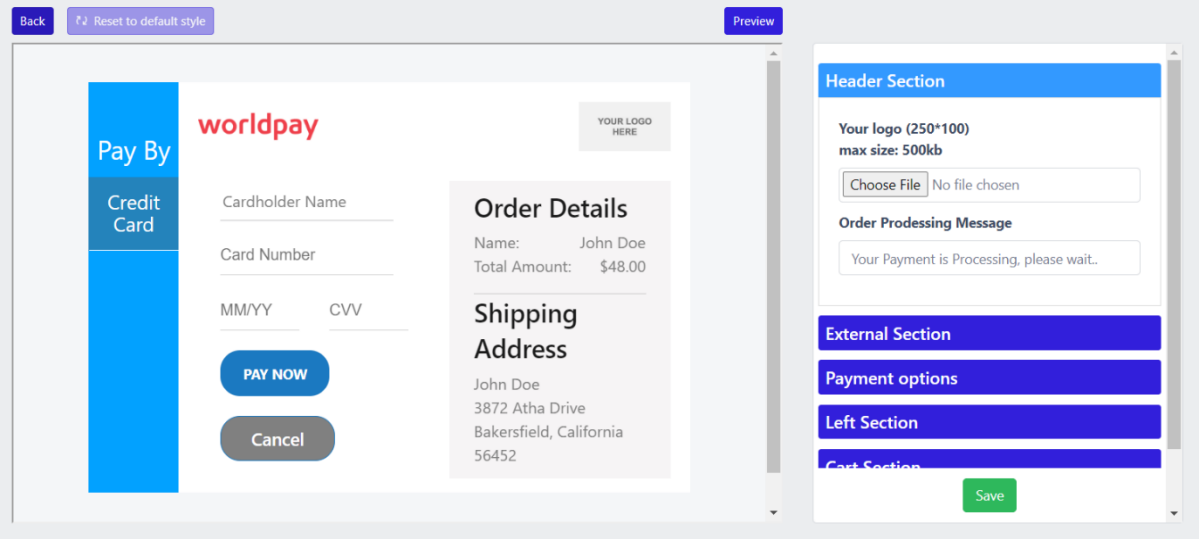
We do not capture any details about users' credit cards.

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.



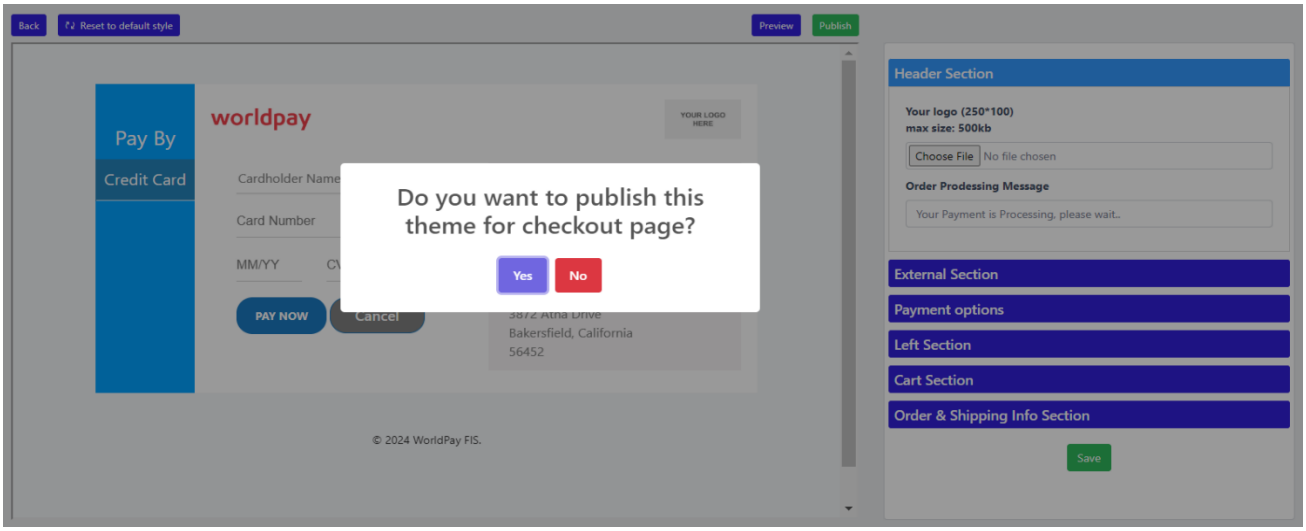
When you open a theme, you'll see a configuration page, as below:

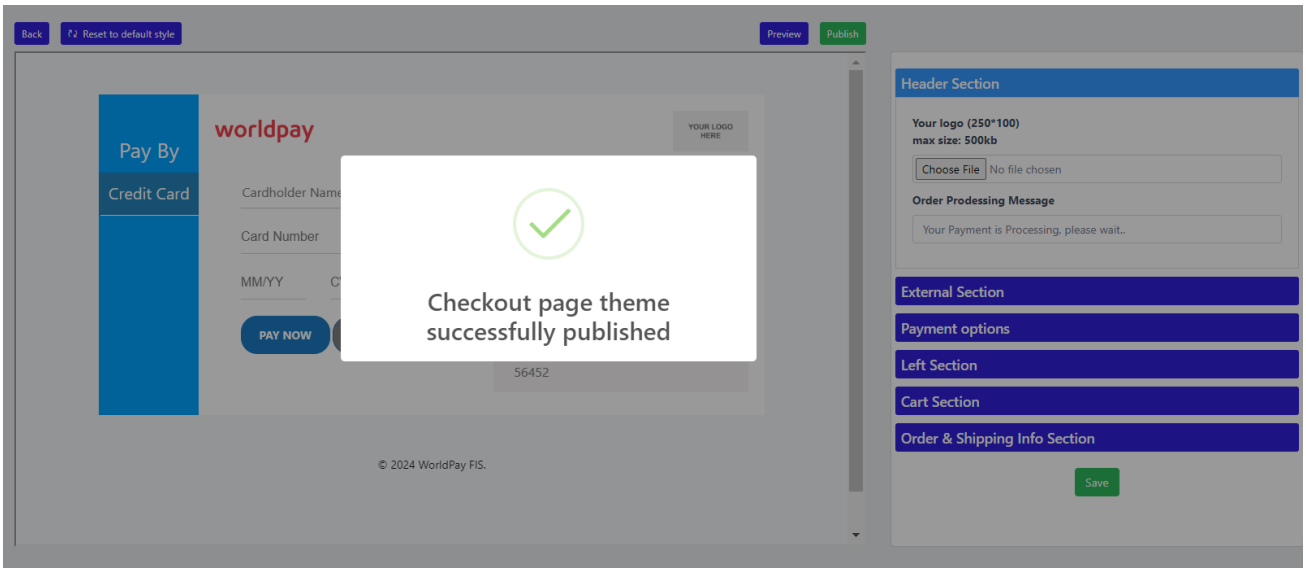


You can customise your store logo, change the background colour and alter the in-text content using the field forms on the right-hand side. You must save changes before you can see a preview of your new checkout page. However, you cannot modify or remove the Worldpay logo.

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:

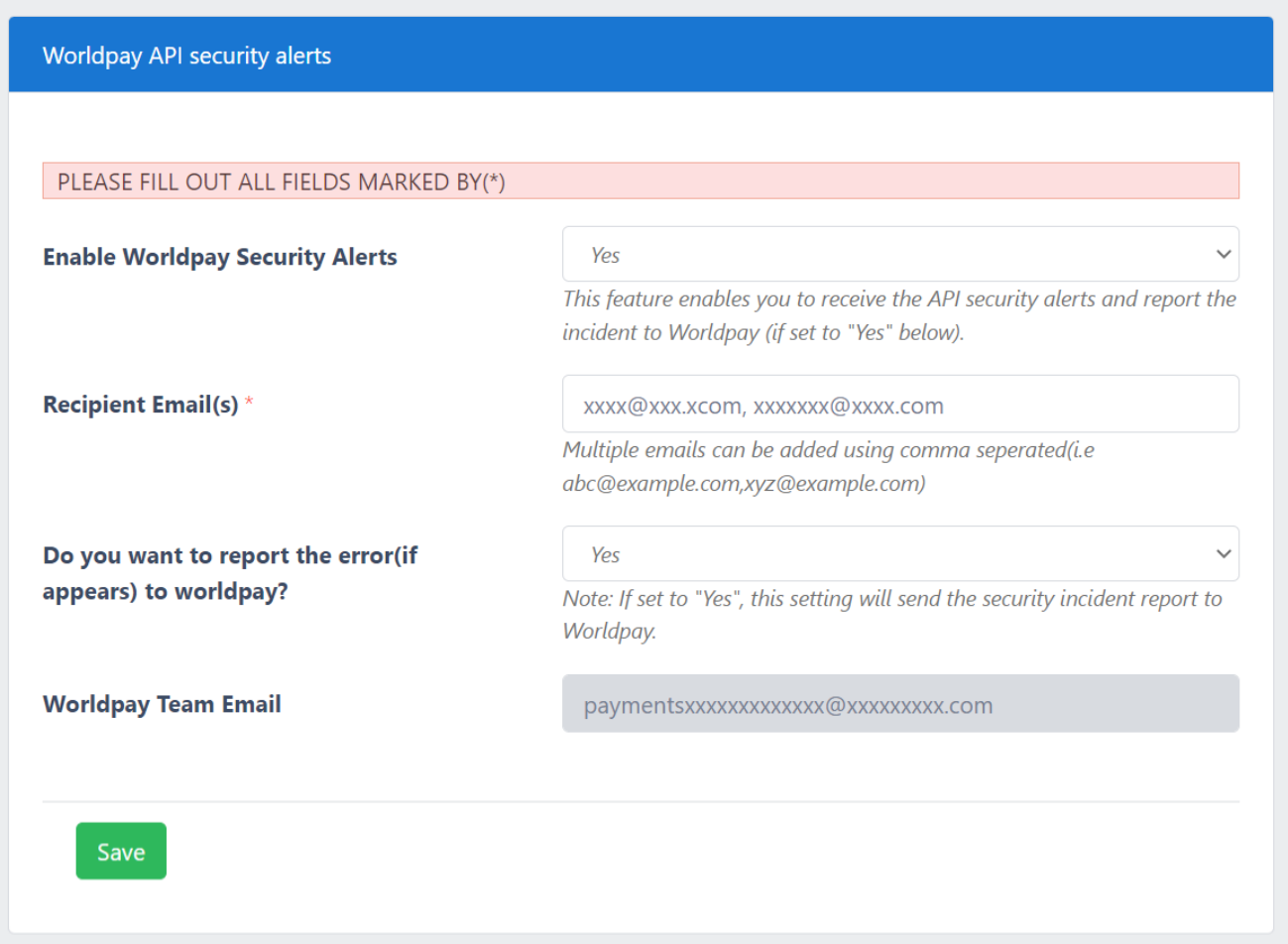




9. Worldpay API security alerts

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:



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.