



# **Fairstone Retail Point-of-Sale Financing Shopify Plugin Installation & Configuration Guide**

**Version 0.3**

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## **PROPRIETARY AND CONFIDENTIAL**

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## CONTEXT

The Fairstone finance service payment extension has been built on the standard and classic Shopify product.

These installation instructions assume that the reader is familiar with the Shopify configuration of extensions and ideally also the payment extensions.

It is assumed that the person is in possession of or have access to all required credentials and keys for Fairstone onboarding.

# INSTALLING AND CONFIGURING THE FAIRSTONE PAYMENT SYSTEM

The installation and configuration of the Fairstone payment system includes multiple steps. Portions of these steps are included directly inside the application, but overall, this guide outlines the complete process from start to finish. It is recommended you read this entire document before proceeding as the order of the steps is important.

## Step 1. Add + Setup Shopify Application

The first step is to install the application to your Shopify Store. To do this:

1. Login to you Shopify Admin as the store owner. This initial setup can only be done by the store owner.
2. Follow this link <https://apps.shopify.com/fairstone> to install the application to your store. (You will need to login to your store as the owner.)
3. Authorize the ability to see certain store details and link the application to your store.

Once complete, you will be taken to the setup page of the app. There are several steps to follow to finalize the application. These steps include:

1. Add Merchant Key
2. Add Plan Product
3. Add Base Plan for Calculation
4. Add Apply Now link
5. Add Calculator and Pay with Fairstone Tags

Each step is outlined in the app and can be easily completed directly within the app and Shopify. You can find detailed reference to each step in the next section of the current document.

In addition to the steps above, you will be required to complete two additional steps not included in the application interface:

1. Configure Shopify Scripts
2. Install the Fairstone Gateway

## Step 2. Configure Shopify Script

Follow the details below to install the Shopify Script. This should be done before installing the payment gateway to ensure it is hidden by default if required.

## Step 3. Add Payment Gateway

Follow the details below to install the Payment Gateway. Make sure to complete this step after installing the Shopify Script to ensure that the gateway is automatically hidden if required.

## Step 4. Enable Application

At this stage, the application should be fully configured and ready to be enabled. In the admin of the application in Shopify, first enable the calculator if you want to display it on the theme pages. Next, enable the application entirely.

Note that it can take up to 60 seconds for Shopify to recognize that the application has been enabled. Once it does, your calculator and pay with Fairstone buttons will become visible and the payment plans page will become accessible.

## Setup Steps Details

The steps below reference the application settings page. This can be found by logging into your Shopify Admin, selecting Apps in the left-hand toolbar, and then clicking Fairstone in the apps list. The setup page is displayed by default until the steps are complete. You can click the settings menu item inside the app to access the settings page at any time.

### 1. Add Merchant Key

The merchant key is required to look up and display the right plans for your customers. The secret is not needed here.

On the application settings page, type in your merchant key and hash. As you type, you will see a save button at the top of your screen. Click on it to save the fields.

The screenshot shows the Fairstone app settings page. On the left is a sidebar with navigation links: Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps (highlighted), and ALES CHANNELS (Online Store). The main content area has a 'Settings' tab selected. At the top right, there is an 'Enable Application' toggle set to 'Enabled' with a 'Disable' button. Below this, the 'Merchant Key + Hash' section contains a description and two input fields: 'Merchant Key' (containing '8B48F35C-AD0F-48FF-AB79-0394DBA826BF') and 'Merchant Hash' (containing 'TEST-077433C9-1595-4AC4-AF13-B8525887EA7B'). A 'Test Mode' checkbox is checked, with a note: 'Note: this has no affect on the payment gateway.'

### 2. Add Plan Product

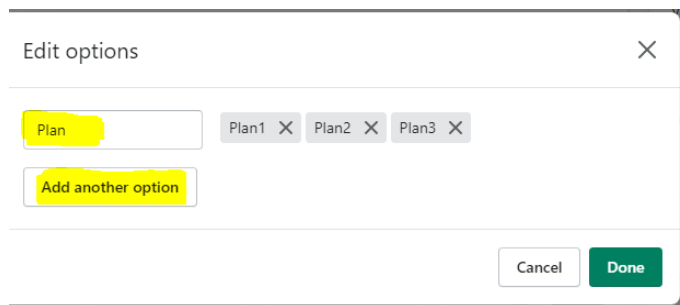
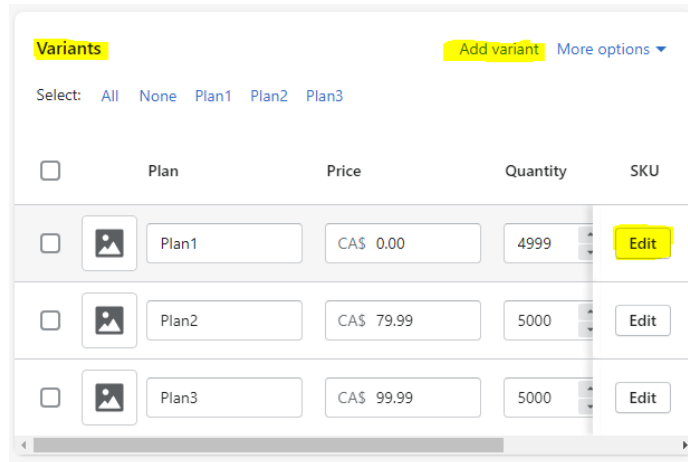
The plan product is required in order to map the right plan hash to the cart during checkout. It also is required so that any admin fees that you as the merchant wants to charge can be charged.

First, you need to create a new product in Shopify. This product must include the following:

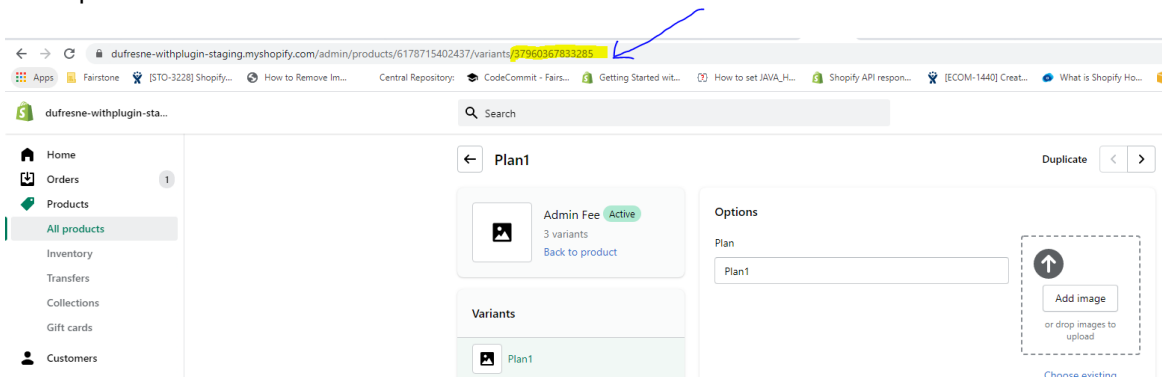
1. It must be made available on the online store channel. If it is not, then checkout will fail, and the customer will not be able to add a plan to their cart.

The screenshot shows the 'Admin Fee' product page in Shopify Admin. The title is 'Admin Fee' and the status is 'Active'. The description field is empty. A notification banner at the bottom states: 'Existing products now have an active status. If this product still needs work, change the status to draft. Learn more'. The page includes a rich text editor for the description and a 'Product status' dropdown menu.

2. It must contain all plans offered as variants.
  - a. Each variant must be titled the same as the name of the plan in Fairstone.
  - b. Each variant must have a price of the admin fee you want to charge. If no admin fee, then set the price of the variant to \$0.
  - c. Each variant must have a plan hash in the SKU field. This needs to match one for one with the plan hashes in Fairstone.

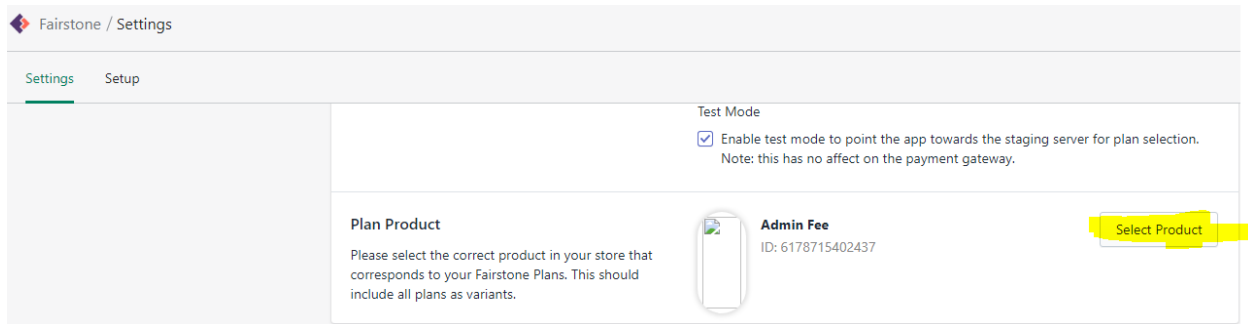


3. It must be titled with the formula "Store Name - Administrative Fee".
4. It must contain a logo that shows nicely as a square logo for your store. This is shown during checkout.
5. It requires a unique tag to be applied to it and used in scripts. We recommend using "fairstone-plan".
6. When you edit the plans, from the URL section please note the variant number which will correspond to the SKU value and share them with Fairstone



Once the product is created, you can add it to the application. To do so,

1. Go to Apps in the left toolbar
2. Select Fairstone,
3. Go to the settings screen if not already there à
4. Under Plan Product, click Select Product and choose the right product from the list of your products.
5. Click Select Product and then save in the title bar area.



Note: The plan product will have its own product page. While it may not be shown to users via any links, it can still be accessed. If you are at all worried about this, follow the steps below to create a product template that automatically hides the product details, redirects users, and forces search engines not to index the page.

Lastly, you will need to report the details of the plan product to Fairstone so they can complete the integration. This involves giving Fairstone the variant ID's of the product so they can map these to your plans.



### 3. Add Base Plan for Calculation

For the calculator to work on the online store, a base set of tiers needs to be configured that will be used to show the correct “as low as” details. This should correspond to one of your plans and generally be the lowest priced plan.

To configure the settings, navigate to the applications settings screen. By default, the first tier is set from \$0.00 to \$499.99 and includes a 3-month payment schedule. Modify this as required, adding additional tiers as needed. There are a few things to note in this process:

1. Plan tiers cannot overlap. If you want to go from 0-500 and 500-1000 for example, you need to set it to 0-499.99 and 500-1000 or 0-500 and 500.01-1000.
2. If a product does not fit into a plan tier, the calculator will not be shown. This is useful if you want to set a minimum for Fairstone pricing. The first tier can be set to any minimum and anything below that will not have the calculator shown.
3. The pricing calculator only works on the individual products and not on the contents of the cart. When the customer goes to the cart and chooses the payment plan option, they will see plans and details based on the entire cart contents.

Once plan tiers have been configured, click the save button in the top title bar to save them to the app. These will then immediately be updated on the online store.

The screenshot shows the 'Fairstone / Settings' app interface. The 'Settings' tab is selected. The 'Enable Plan Calculator' section is currently 'Enabled' (indicated by a green pill) and has a 'Disable' button. Below this, a note states: 'Enable the calculator to show a base calculation of months and charges on product and collection pages. Tags must be installed and the app must be enabled to show the calculator.' The 'Base Plan Tiers' section contains a table for configuring plan tiers. The table has three columns: 'Minimum \$', 'Maximum \$', and 'Months'. There are three rows of input fields. The first row has values: \$ 0.01, \$ 499.99, and 6. The second row has values: \$ 500, \$ 1000, and 3. The third row has values: \$ 1001, \$ 1500, and 24. Each row has a trash icon to its right. An 'Add Price Tier' button is located at the bottom right of the table.

Minimum \$	Maximum \$	Months	
\$ 0.01	\$ 499.99	6	🗑️
\$ 500	\$ 1000	3	🗑️
\$ 1001	\$ 1500	24	🗑️

Add Price Tier

## 4. Add Apply Now link

The calculator on product pages includes a spot to add a link. This will typically correspond to the Apply Now (PurplPay Digital Financing Application) page for your store. This link must be included.

To include the link, simply paste the full link into the Apply Now link area on the applications settings page, pressing save in the top title bar to save the settings. This will immediately update the online store with the link.

The screenshot shows the 'Fairstone / Settings' page with the 'Settings' tab selected. On the right side, there is a section titled 'Apply Now Link' with a text input field containing the URL 'https://staging-web.fairstone.ca/dufresne-withplugin-staging'. A 'Add Price Tier' button is visible in the top right corner of the settings area.

## 5. Add Calculator and Pay with Fairstone Tags

The calculator and pay with Fairstone button are added automatically when tags are installed to the theme in the right place. These tags are important as they let you set the exact location of where you want these to show.

Note that this requires accessing your themes code. If you are not comfortable with this, you should seek additional technical assistance. We are happy to help with this as well. Further, it is important to always backup your theme before making any changes.

Note that the details below are based on the debut theme. All themes are different, and your store may have a very different layout and structure.

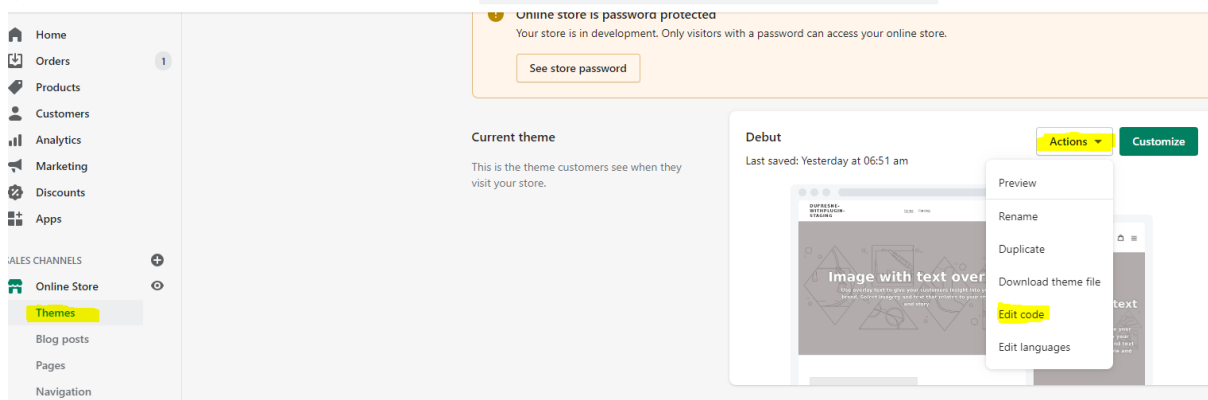
Further, note that these tags will only be replaced and show the right details if the application is enabled and the calculator is also enabled. Please check your theme settings if things are not showing properly.

The screenshot shows the 'Fairstone / Settings' page with the 'Settings' tab selected. The 'Apply Now Link' section is visible at the top. Below it, the 'Calculator + Pay With Fairstone Tags' section is highlighted. It contains instructions on how to use the provided code snippets in the theme code. The snippets are:   
1. 'Product Page - Calculator': `<div class="fairstone-product-calculator" data-price="{ {{ product.selected_or_first_av`   
2. 'Collection Grid Item - Calculator': `<div class="fairstone-product-grid-calculator" data-price="{ {{ product.price }}`   
3. 'Pay With Fairstone Button': `<div class="fairstone-pay-with"> </div>`

### Payment Calculator - Collection Grid

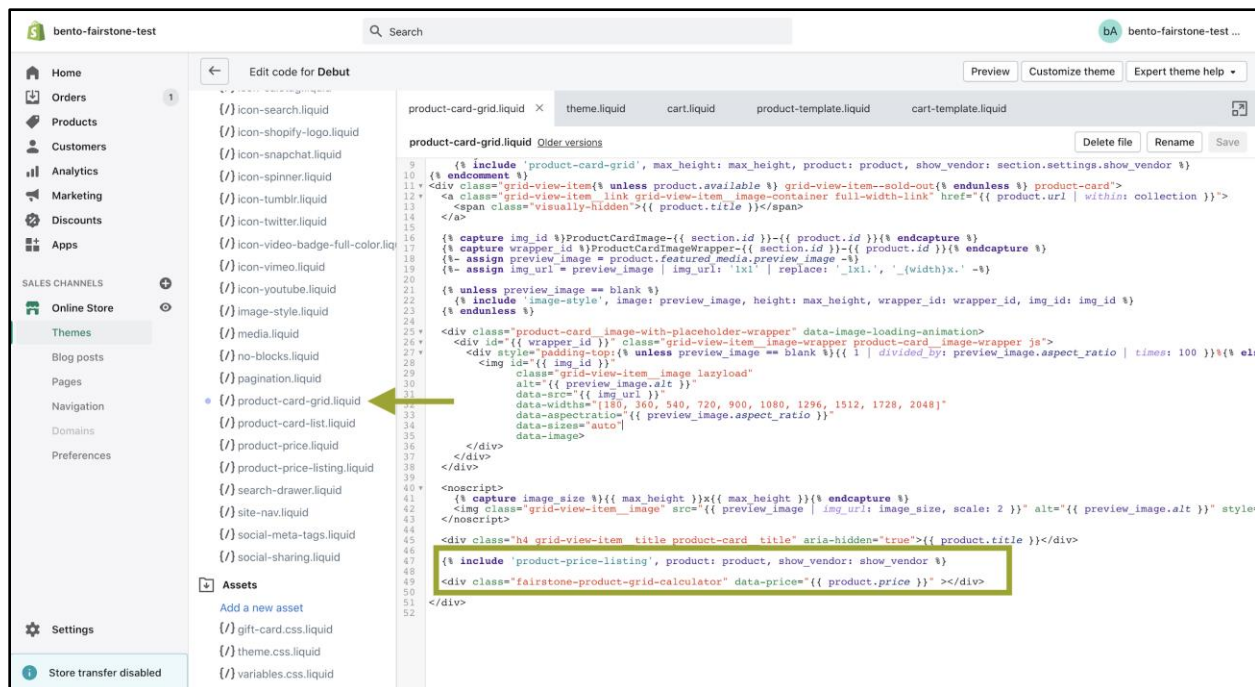
To install the calculator, a specific set of tags needs to be added to the collection grid view. Follow the steps below to install this first tag to your collection pages:

1. Open the application settings page and copy the tag included for the Collection Grid view
2. Open the theme edit code area for the theme you wish to update.



3. In the Snippets section of the theme, look for a 'collection-grid' file.
4. In the collection grid, find the correct place you would like to include the pricing calculator. This is normally just below the price on the grid template
5. Add in the tag as it was and save the file.

Your grid view will now automatically include the right plan pricing details if the product fits into one of the tiers.

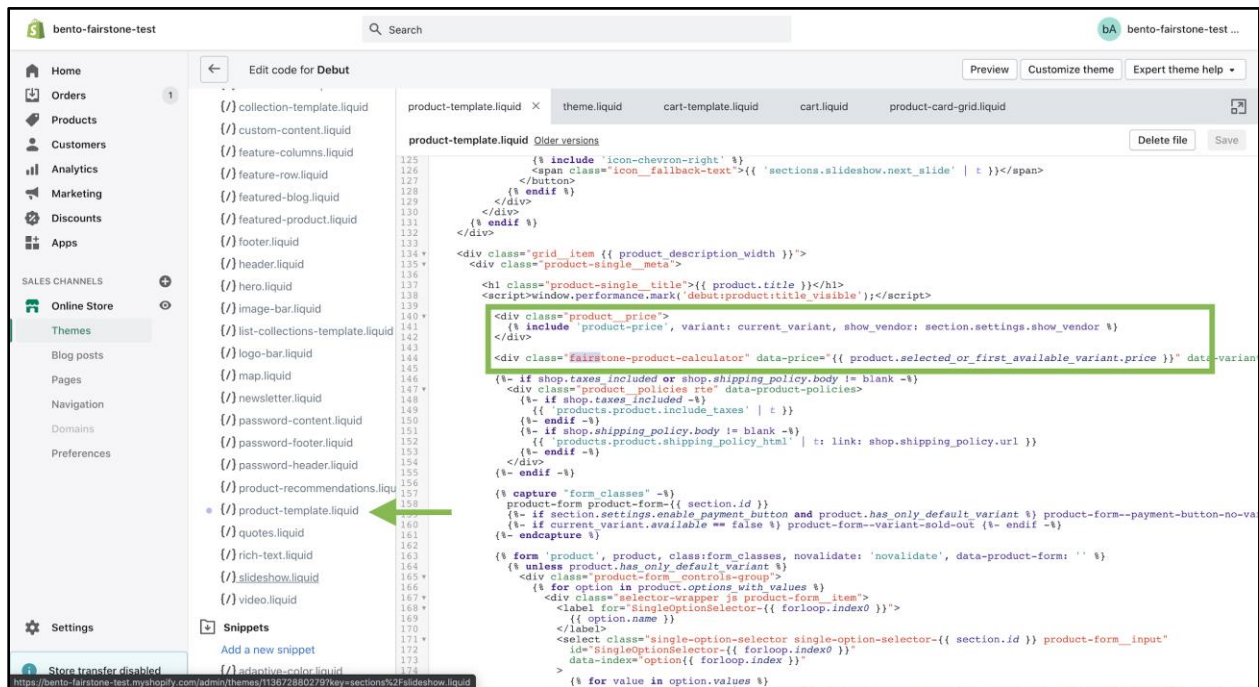


## Payment Calculator - Product Page

To install the calculator, a specific set of tags needs to be added to the product page. Follow the steps below to install this second tag to your product pages:

1. Open the application settings page and copy the tag included for the Product Page view
2. Open the theme edit code area for the theme you wish to update.
3. In the Templates section of the theme, look for a 'product liquid' file.
4. In this file, it may reference a section or snippet. Open the reference file.
5. In the referenced file, find the position you want to show the calculator. This is typically below the price of the product.
6. Add in the tag as it was and save the file.

Your product page will now automatically include the right plan pricing details if the product fits into one of the tiers.

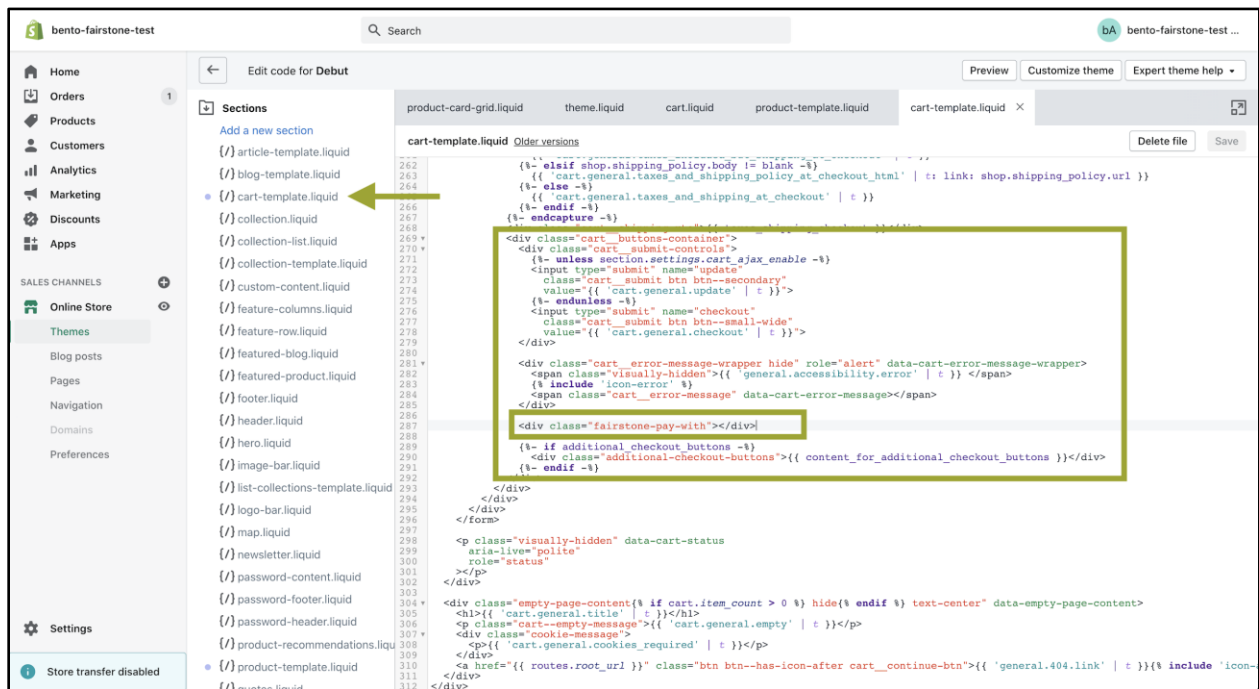


## Pay with Fairstone - Cart Page

To install the “Pay with Fairstone” button on the cart page, a tag needs to be installed under the main checkout button. Follow the steps below to install this third tag to your cart page:

1. Open the application settings page and copy the tag included for the Pay with Fairstone button
2. Open the theme edit code area for the theme you wish to update.
3. In the templates area, look for the ‘cart liquid’ file
4. On this template, find the add to cart button and add in the code below it, then save

Once complete, the “Pay with Fairstone” button will be added to the cart page once.



## ADDING THE FAIRSTONE GATEWAY

The application for Shopify will work to show plans and the calculator on your product and collection pages. It however does not automatically install and configure the Fairstone payment gateway. This is needed so that users can finalize the payments and effectively pay with Fairstone.

Note: By following these steps, the Fairstone gateway will begin to appear in your live store's checkout. If you do not want this to happen, please install the Shopify Script first and set the flag "Always\_Show\_Fairstone" to false. This will ensure that the gateway is hidden until the rest of the application is setup.

To accomplish this, follow these steps to get your gateway configured. You will need your merchant key and secret to complete installation.

1. Login to your Shopify Admin as the store owner. This setup can only be done by the store owner.
2. Follow this link to access the Fairstone Gateway.
3. Approve the installation by clicking approve
4. On the configuration page, include the merchant key and secret and press save.

You are all set; the gateway has been configured and will allow users to select that option when it makes sense to do so.

## ADDING THE SHOPIFY SCRIPT

The Shopify Script for Fairstone works to ensure your customers select the right payment gateway during checkout. Once they have added a plan to their cart, the script automatically hides the other gateways and ensures that they can only proceed through the Fairstone Checkout.

To install the script, first ensure that Shopify Scripts is installed and approved for your store. Note that is only available to Shopify Plus merchants.

You can install it directly from here: <https://apps.shopify.com/script-editor>

Once installed, create a new payment script. Its best to use the blank template. On the template, copy and paste the code from the attached script file, save, and then publish.

###CODE SNIPPET ###

---

```
## This script should be used to hide the Fairstone payment gateway during regular checkout
## and only show the Fairstone payment gateway when a plan is selected. It can easily be
## combined with other payment scripts.
ALWAYS_SHOW_FAIRSTONE = false
FAIRSTONE_TAG = "fairstone-plan"
## Loop through cart line items
PLAN_INCLUDED = false
## if any are fairstone plan, set plan_included to true, break
Input.cart.line_items.each do |line_item|
  if line_item.variant.product.tags.include? FAIRSTONE_TAG
    PLAN_INCLUDED = true
    break
  end
end
## if plan_included == true, hide all gateways other then fairstone
if PLAN_INCLUDED == true
  Output.payment_gateways = Input.payment_gateways.delete_if do |payment_gateway|
    payment_gateway.name != "Fairstone Payments"
  end
  puts "All other gateways removed"
## if plan_included == false and ALWAYS_SHOW_FAIRSTONE != true, hide fairstone gateway
else
  Output.payment_gateways = Input.payment_gateways.delete_if do |payment_gateway|
    payment_gateway.name == "Fairstone Payments"
  end
  puts "Fairstone gateway removed"
end
end
---
```

The script has two settings located right at the top:

1. Always Show Fairstone - This should be set to true or false. If set to true, it will always show the Fairstone gateway. If it is set to false, it will hide the Fairstone gateway if a plan has not previously been selected.
2. Fairstone Tag - This is the tag on the plan product. This can be anything you like, however must match the tag on the plan product in your online store.

Once the script is installed, it is important to make sure the plan product is tagged with the tag mentioned above in the script.

Once this is done, your script is fully installed and will work to hide and show the right payment gateways.



## HIDING THE PLAN PRODUCT PAGE

The plan pricing product must be accessible on the online store, and while this is not normally an issue if it is not included in collections, select merchants may want to ensure that the page is not accessible. [To do this, follow the steps below. Note that this is development work and may require a developer to complete.](#)

1. Open your Shopify Admin and select Online store from the left toolbar
2. On your published theme, select More Actions and then Edit Code
3. On the left-hand menu for the theme editor, under Templates, select Add Template...
4. In the modal, select product from the dropdown and call the template "no-show-online-store".
5. This will then create a new file with some contents. Select those contents and remove them entirely.
6. Copy and paste the code from below into this template and save the file.

###CODE SNIPPET###

---

```
<meta name="robots" content="noindex" />
```

```
<script>
```

```
    window.location.replace("/");
```

```
</script>
```

---

Once the template is configured, it now needs to be applied to the product. To do this, go to your products, find the plan pricing product, and on the details, view look for the template picker in the right-hand list of cards. Choose the alternate template we just created, "no-show-online-store" and save.

If you now visit that page on your online store, you will be redirected back to the home page of the site and not be able to access that page. Search engine crawlers will also not index that page based on meta tags applied to the page.

## COMMON ISSUES AND REMEDIES

### Customers Cannot Add Plan - Shown Error Ref 1001

This is due to the product plans not being accessible to the plan chooser. Normally this is because the plan product has not been published to the online store. To fix this, make sure that the plan product is available on the online store as a product. You can hide the product from all collections; however, it must be made available on the online store channel.

### Customers Cannot Add Plan - Shown Error Ref 1002

This is due to the plan hash coming from Fairstone not being found in the plan product in Shopify or that multiples of the same hash were found. Please ensure that all of the plan hashes stored in Fairstone match up to those in Shopify and map one to one. Plan hashes should always be stored in the SKU field and should be unique for each variant.

### Customer Not Seeing Pricing Plan Calculator

If the customer view is not including the pricing plan calculator, follow these steps to make sure it is configured correctly:

1. Check App Settings - Ensure the app is enabled and the pricing plan calculator is also enabled. Both need to be enabled to show the pricing calculator.
2. Check Tags - The correct tags need to be installed to your theme pages in order to show the calculator and 'pay with Fairstone' button. Ensure these are included in your theme field in the correct places
3. Check JS conflicts - If there is a conflict, this may prevent our script from inserting things. Have your developer check for conflicts.