



Fairstone Retail Point-of-Sale Financing Shopify Plugin Merchant & Fairstone High level setup check list

Version 0.2

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CONTEXT

The Fairstone finance service payment extension has been built on the standard and classic Shopify product. It allows merchants to provide to their web store customers an additional financial method of payment from Fairstone. Once installed this extension allows a merchant to connect their web store to the Fairstone system with plan selection at the cart store level.

The current check list document aims on providing an overview of the required steps to install and test the Fairstone Shopify plugin.

This check list assumes that the reader is familiar with the Shopify configuration of extensions and ideally also the payment extensions.

This check list assumes that the merchant has a proper Shopify environment, has the Shopify owner access, has the Fairstone app (plugin), is in possession of or have access to all required credentials and keys for Fairstone onboarding.

The check list completion requires

- A Shopify subscription
- An agreement with Fairstone
- The assistance of the Fairstone onboarding team
- The assistance of the Fairstone engineering team
- The Fairstone app (plugin)
- The Shopify Fairstone Installation and Configuration Guide
- A list of financial plans (plan group)
- A list of admin fee represented as admin SKU products
- Staging key, Hash and API
- Prod key, Hash and API
- Merchant code snippet
- Knowledge of the customer journey initiated from the merchant web, passing thru the Fairstone payment gateway and ending back to the merchant website

STEPS

The required steps to install and test the Fairstone Shopify plugin are as followed.

While executing those steps both the Fairstone onboarding and engineering teams will be happy to assist you.

Step 0: Gathering plan list and admin fees [Fairstone & Merchant]

As both the Shopify plugin and the Fairstone systems will require financing plans the starting point is to identify them along with optional admin fees. Financing plans have specific codes for each of them and admin fees are represented with SKUproducts.

Here are some samples of financing plan and their associated code and Skuproduct

DESCRIPTION	FAIRSTONE PLAN	SKUproduct	PRICE
No Pay SAC			
3 months	14030	Note	\$0.00
6 months	14065	Note	\$0.00
9 months	14095	Note	\$59.99
12 months	14125	Note	\$79.99
15 months	14155	Note	\$99.99
18 months	14188	Note	\$129.99

Free Financing			
24 months	16245	Note	\$129.99
36 months	16365	Note	\$169.99
48 months	16480	Note	\$199.99
60 months	16600	Note	\$229.99

No Interest/No Payment (QC residents only)			
3 months	12033	Note	\$0.00
6 months	12065	Note	\$0.00
9 months	12095	Note	\$59.99
12 months	12125	Note	\$79.99
15 months	12155	Note	\$99.99

Note: admin fee SKU product must be retrieved inside the configuration phase (step 7)

Step 1: Creating Staging new merchant Hash and Key [Fairstone]

To prepare the connection between the merchant Shopify plugin extension and the Fairstone system, the Fairstone engineering team creates a new merchant Hash and API Key inside their staging environment (system)

For **merchant already using** the simple Shopify connection with Fairstone the existing Merchant Hash and Key are used inside the staging environment and the Fairstone engineering team ensure to update the related **Merchant Mapping option to showPlans = false**

Step 2: Configuring Staging Fairstone Shopify gateway [Fairstone]

Inside the staging environment the Fairstone engineering team configures the Fairstone Shopify gateway and maps it to the merchant (merchant mapping) staging Key and API.

This step creates a **specific payment gateway install URL** which is shared with the merchant technical team. This URL is to be used inside upcoming step 5.

Step 3: Merchant mapping and plan group association [Fairstone]

Inside both Fairstone environments staging and production, the Fairstone engineering team ensures that **merchant mapping** for this new/existing 'Hash' has the **proper plan group** linked to it.

Plan group are also required inside the configuration phase (step 7)

Step 4: Updating plan group with admin fee [Fairstone]

Inside both Fairstone environments staging and production, the Fairstone engineering team updates the **Plangroup** with the proper **adminSKU**.

Admin SKU are obtained / identified inside the config steps so for existing merchant they can be obtained in advance; for new merchant, this step can be done inside the configuration phase (step 7).

Step 5: Installing Fairstone payment gateway in merchant PROD & test mode [Merchant]

Using the URL obtained inside step 2, the technical merchant team installs the Fairstone Payment gateway in their PROD environment and set it to 'Test mode'.

Step 6: Following the Install application guideline of the Fairstone application [Merchant]

The technical merchant team follows the installation steps inside the Fairstone application to complete its set-up (Fairstone Shopify plugin extension)

Step 7: Following documentation to configure the Fairstone Shopify plugin [Merchant & Fairstone]

With the guidance/assistance of the Fairstone engineering team, the technical merchant team follows the documentation to **set and configure the Fairstone application** (Shopify Fairstone Installation and Configuration Guide).

Step 8: Updating web store non-active theme with code snippet [Merchant & Fairstone]

With the guidance/assistance of the Fairstone engineering team, the technical merchant team **updates the theme code** with the recommended **code snippets in the non-active dev theme**.

The code snippets are available inside the documentation (Shopify Fairstone Installation and Configuration Guide).

Step 9: Testing ECOM transaction customer journey [Merchant & Fairstone]

Still in the dev team preview mode, both the Fairstone engineering and the technical merchant teams validate the ECOM application and Payment gateway flow.

This step reproduces the customer journey beginning by adding products to the Cart and ending by a successful authorization (Adding products to Cart, Proceeding to checkout, Choosing Fairstone as a method of payment, choosing financial plan, customer authentication, displaying summary, accepting terms and condition , obtaining authorization, going back to merchant site with a successful authorization message).

Step 10: Activating PROD [Merchant & Fairstone]

At this point both systems are ready to activate the production Fairstone financing method of payment option including the plan selection at the merchant site level. **This is done inside the Fairstone application by removing the 'Test mode' setting.**

Once activated a test with a production account should be done to revalidate the customer journey (Adding products to Cart, Proceeding to checkout, Choosing Fairstone as a method of payment, choosing financial plan, customer authentication, displaying summary, accepting terms and condition , obtaining authorization, going back to merchant site with a successful authorization message).