



<https://verifone.cloud/docs/online-payments/plugins/shopify-plugin-integration/automatic-setup>

Updated: 17-Apr-2024

Automatic Setup

After [installing the app](#), you need to configure the correct credentials that will associate it to your Verifone account.

Plugin Setup

The **Auto Setup Tool** pop-up will be displayed automatically, if this is your first time trying to configure the Verifone settings. If you already did the configuration, you can always access the tool as indicated below:



Verifone Payment Gateway

Accept card payments and other payment options available in your Verifone account. [Obtain API Keys](#)

- Account settings
- Display settings
- Card settings
- Alternative payments
- Advanced settings

Enabled Test Mode



Auto Setup Tool

User ID

API Key

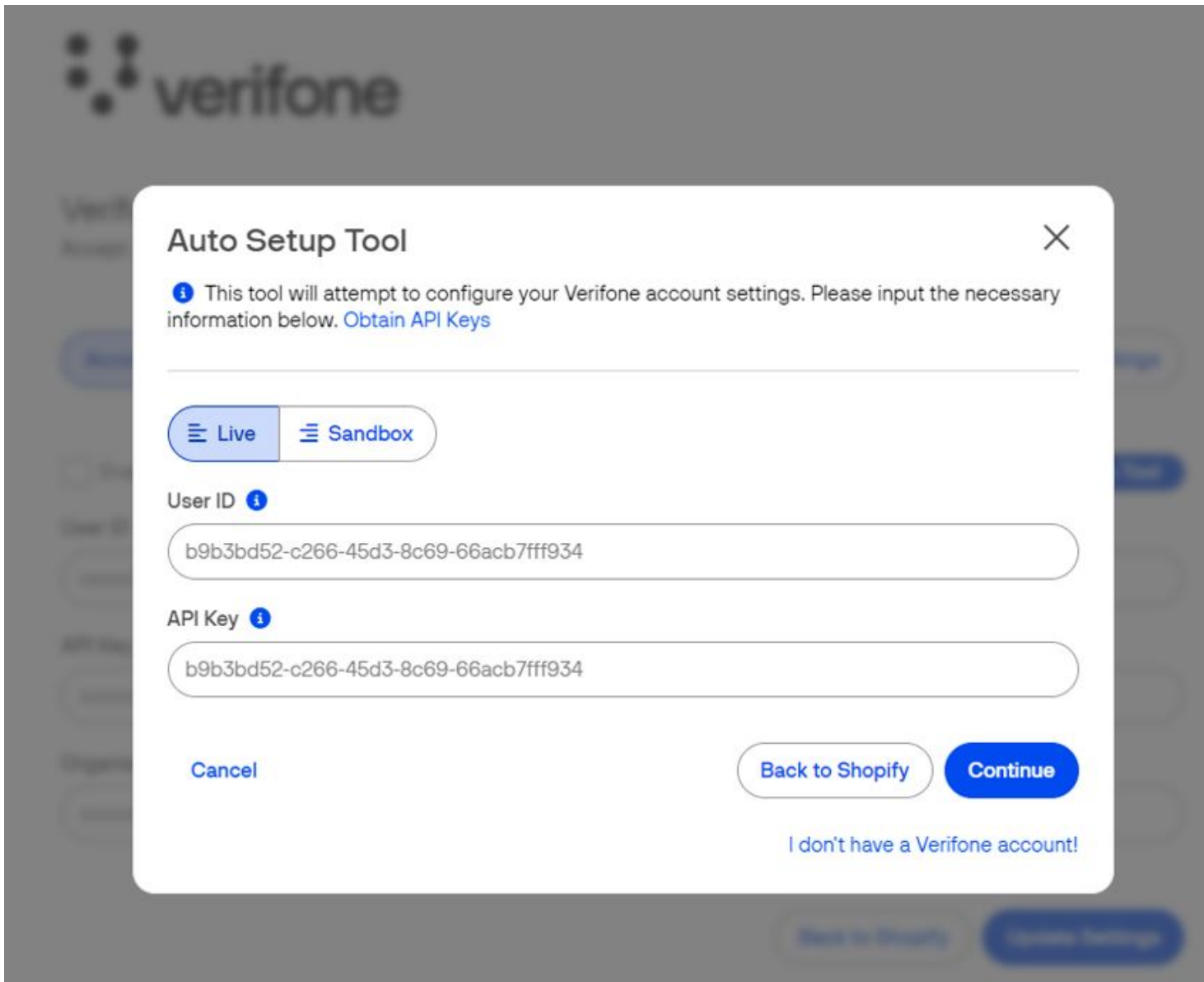
Organisation ID

Back to Shopify

Update Settings

Account settings

1. Enter the below information, to configure your Verifone account settings.



If you don't have a Verifone account click on **I don't have a Verifone account**, and you will be redirected to the Sales team.

For more information on fields click on the tooltip "i" icon.

Enter the *User ID* and *API Key*, then press on **Continue**. Wait until a success or error message is displayed.

You can use a Verifone test mode environment to test your integration by clicking on the **Sandbox** option (for this, you will need to have an account set up in the test environment). If the *Sandbox* option is selected, you will need to use the information from your test account (user ID, API key).

If you wish to change the integration environment, you will need to return to this page by clicking the **Manage** button on the app in your Shopify admin, then **Auto Setup Tool** and update the API Key and User ID associated with the Verifone Account with the ones corresponding to the selected environment.

- **API Key:** The value of the [API Key](#) you created in [Verifone Central](#), under the user icon > *API keys* > *Create API key*.
 - **User ID:** The ID of the user that generated the API key in Verifone Central. You can find this information in your Verifone Central account, under *Profile ? API Keys*.
2. If the successful message displays, then the configuration is done. We recommend checking all tabs to verify all expected payment methods are enabled and clicking a final time on **Update settings**.
3. Two failed messages can be displayed:
- **Invalid credentials. Make sure you enter right credential/environment and try again!:** You must check if both the API Key and User ID are correctly entered, and the environment is properly chosen.
 - **Account could not be auto-configured, manual configuration is required:** Follow the steps from the [Manual setup](#) documentation. If you are unsure what is your environment, contact your Verifone representative.

(Optional) Display settings



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Account settings

Display settings

Card settings

Alternative payments

Advanced settings

Theme ID 

XXXXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXXXXXX

☰ Credit Card 

☰ Klarna 

☰ Swish 

☰ Gpp2 

☰ Vipps 

☰ MobilePay 

☰ PLCC 

Drag&drop to set up the displaying position of each payment method in the checkout page. Changes are saved automatically.

Back to Shopify

Update Settings

For more information on how to setup the display and theme of the checkout page see **Manual Setup** > [Display settings](#).

(Optional) Advanced settings



Verifone Payment Gateway

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Account settings Display settings Card settings Alternative payments **Advanced settings**

Transaction type ⓘ

[Back to Shopify](#) **Update Settings**

For more information on how to configure advanced settings see **Manual Setup** > [Advanced settings](#).







Your account setup is functionally complete, and you can click on **Back to Shopify** to continue plugin activation.

4. Select the credit card brands allowed on your Verifone account and click the **Activate Verifone Checkout** button.

Test mode box: If you have enabled test mode in the previous [Account settings](#) step, make sure to also enable it on this page so that both your Verifone settings as well as Shopify Store are running in test mode.

The selected card brands will be displayed to your customers as available in Verifone Checkout but selecting a specific card brand will not make that brand available in the checkout. The brand available in the checkout are the ones setup on your Payment provider contract (PPC).

The image shows a screenshot of the Shopify payment settings interface for Verifone Checkout. It features a list of supported payment methods, each with a checked checkbox and a corresponding logo. Below this list is a 'Test mode' section with a description and an unchecked checkbox. At the bottom, there are two buttons: 'Uninstall Verifone Checkout' in red and 'Activate Verifone Checkout' in green.

<input checked="" type="checkbox"/>		Visa
<input checked="" type="checkbox"/>		Mastercard
<input checked="" type="checkbox"/>		JCB
<input checked="" type="checkbox"/>		American Express
<input checked="" type="checkbox"/>		Discover
<input checked="" type="checkbox"/>		Diners Club

Test mode

Test your Verifone Checkout setup by simulating successful and failed transactions.

Enable test mode

[Uninstall Verifone Checkout](#) [Activate Verifone Checkout](#)

Shopify Settings

1. The Verifone Checkout provider will be displayed in the *Supported Payment Methods* box.

Payments

- Checkout and accounts
- Shipping and delivery
- Taxes and duties
- Locations
- Gift cards
- Markets
- Apps and sales channels
- Domains
- Customer events
- Brand
- Notifications
- Custom data
- Files
- Languages
- Policies

Payment providers

Providers that enable you to accept payment from a third party.

Choose a provider

Supported payment methods

Payment methods that are available with your chosen providers.



Provider
PayPal

Status
Inactive



Provider
Verifone Checkout

Status
Active

Add payment methods

- In the *Payments* box, select **Manage** and then choose one of the following options:
 - Automatically capture payment for orders* – if the **Sale** transaction type was selected when [setting up your payment method](#), at configuration.

- *Manually capture payment for orders* - if the **Preauth / Auth** transaction type was selected when [setting up your payment method](#), at configuration.

Store details

Plan

Billing

Users and permissions

Payments

Checkout and accounts

Shipping and delivery

Taxes and duties

Locations

Gift cards

Markets

Apps and sales channels

Domains

Customer events

Brand

Development stores can only process test payments.
Activate the [test payment provider](#), or set your payment method for [development stores](#).

Payment providers

Payment capture method

Choose between [automatic and manual capture](#).






















Automatically capture payment for orders.
The customer's payment method is authorized and charged at the time of purchase.

Manually capture payment for orders.
The customer's payment method is authorized at the time of purchase. You must manually capture payment within the authorization period.

3. Click on *Checkout* in the navigation menu and select **Require first and last name** for the **Full name** option. Click on **Save** to apply your options.

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Demo store

-  Store details
-  Plan
-  Billing
-  Users and permissions
-  Payments
-  Checkout
-  Customer accounts
-  Shipping and delivery
-  Taxes and duties
-  Locations
-  Gift cards
-  Markets
-  Apps and sales channels
-  Domains
-  Customer events
-  Brand
-  Notifications
-  Custom data
-  Languages
-  Policies
-  Store activity log

Checkout

Checkout style

Upload a logo, change colors, fonts, and more.

Customize checkout

Customer contact method ⓘ

Select what contact method customers use to check out. Customers will receive order and shipping notifications.

- Phone number or email
- Email

ⓘ To send SMS updates, you need to install an SMS app.

- Show a link to download the [Shop App](#). Customers will be able to track their order on the app.
- Require the customer to log in to their account before checking out.

Customer information

Full name

- Only require last name
- Require first and last name

Company name

- Don't include Recommended
- Optional