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<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 

XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX

API Key 

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Organisation ID 

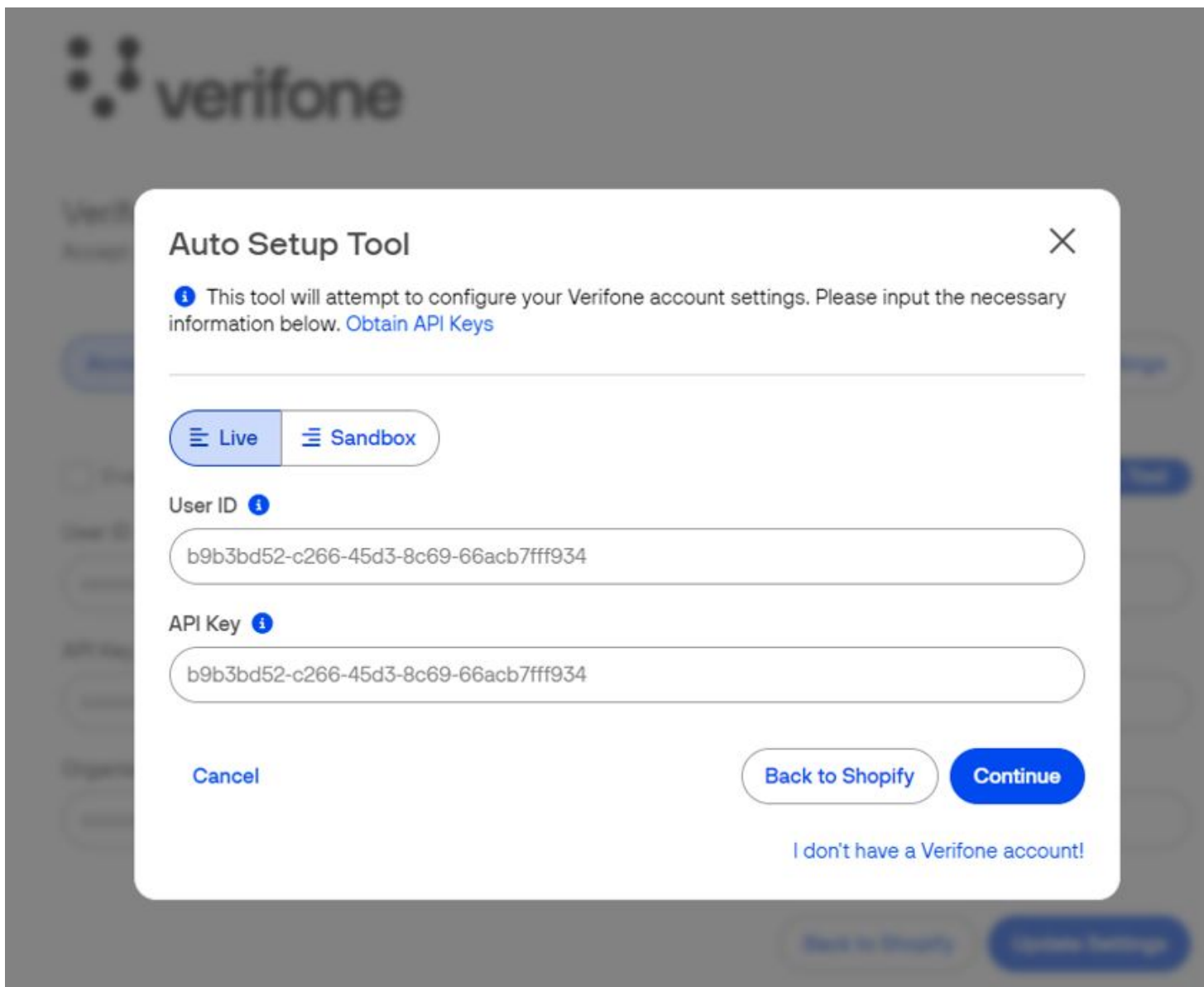
XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX

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**



## 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](#)

Theme ID 

XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX

☰ 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

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](#)

Transaction type ⓘ 

Sale ▼

[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).

☒  Visa


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☒  Mastercard


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☒  JCB


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☒  American Express

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☒  Discover

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☒  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 the selected providers.








Provider

Status

PayPal

Inactive



Provider

Status

Verifone Checkout

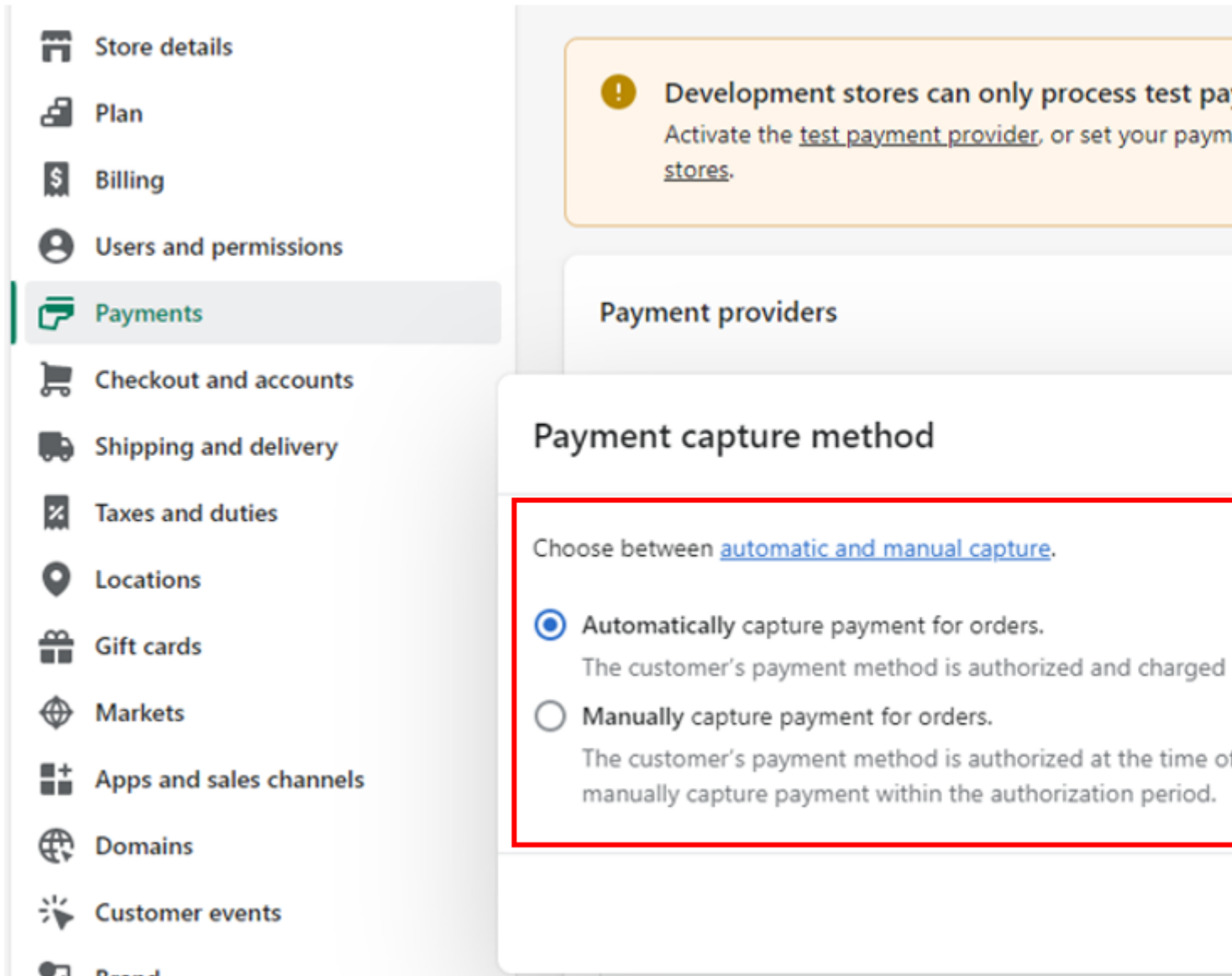
Active

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.



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