



User Guide

WooCommerce Extension

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Introduction

The Credorax WooCommerce extension provides you with access to the Shift4 smart payment service via a simple and easy integration for WooCommerce on the WordPress platform. With this extension you can accept payments on your WooCommerce Wordpress site, allowing shoppers to pay using their credit cards without leaving your website.

The purpose of this document is to describe in detail how to install the Credorax WooCommerce extension, as well as the configuration options available to merchants using the extension.

In order to process payments using this extension you must be registered to Shift4's services. After our team creates an account for you, you will receive credentials for accessing your connectivity details on our *Insights* merchant portal.

Without the required credentials and corresponding permissions on Shift4's side, payments will not be processed and transactions will be denied.

To register and for more information, please contact your Account Manager or support.europe@shift4.com.

Useful Documents / References

The following document may be useful in understanding the Shift4 Payment API used by the WooCommerce Credorax extension:

- Shift4 Payment Platform – Comprehensive documentation of the Shift4 Payment API, which can be found on the [Shift4 Developers Portal](#).

System Minimum Requirements

- WordPress version 4.4 or newer
- WooCommerce version 3.0 or newer

Certification

All new implementations must complete a certification process in sandbox mode before they can start sending production transactions, to ensure the quality of integration and integrity of merchant data.

Please note that only test-card data should be used for testing.

Additional certifications are required if the implementation makes use of new features offered by Shift4.

Please contact integration.europe@shift4.com for the latest test card details and more information.

Publisher Information

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Installing the Extension

The extension is installed as a plugin from the WordPress Admin panel, using the plugin package provided by Shift4 . To receive the plugin package contact your Solution Architect.



Note: We recommend that a developer install the extension.

Install using the Plugin Package provided by Credorax

To install the extension from the WordPress Admin panel you will need to have the appropriate permissions associated with your user, and to have downloaded the package containing the plugin provided by Credorax.

1. Log in to your WordPress Admin panel, navigate to the **Plugins** menu and click **Add New**.
2. Click **Upload Plugin** at the top of the screen.
3. Select the zip file from your local file system.
4. Once selected, click **Install Now**.
5. When installation is complete, the message “Plugin installed successfully” is displayed. Click **Activate Plugin** at the bottom of the page to activate the plugin.

Configuring the Extension

You can start configuring your extension once you completed extension installation and received your Shift4 Insights Merchant Portal credentials.



Note: Your connectivity details for the Production environment can be accessed from the Connectivity Details tab in the Insights Merchant Portal.

Your Sandbox credentials will be provided by the Integration team.

Step 1: Enable Credorax for WooCommerce

1. In the WordPress Admin panel, go to **WooCommerce > Settings > Payments** and select **Credorax Payment Solution**.
2. To enable the configuration, set **Enabled** to **Yes**.

Enabled	<input type="text" value="Yes"/>
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Step 2: Configure basic settings

This step is a continuation of [Step 1](#), and is performed in the **Settings > Payments > Credorax Payment Solution** section in the WooCommerce panel.

1. Enter a unique **Title** to identify the group of payment methods during checkout. The title entered here will be displayed to your shoppers at checkout.
You can also enter a **Description** to provide your shoppers with more information regarding the payment methods.
The following figure shows an example of a title and description displayed to shoppers at checkout.

2. In the **Mode** field, choose the operating mode for your Shift4 merchant account.
 - When you are working in a test environment, choose **Sandbox**.
 - For your live store, choose **Live**.
3. Set your Merchant ID, Signature Key and Static Key.

Enter the relevant credentials for the operating mode previously selected in [Step 2](#)
4. You can now set the **Payment Action** to one of the following:
 - **Authorise Only** – If this option is selected, an Authorisation (auth) request will be initiated to verify with the card issuer that sufficient funds are available and reserved for settling the payment in due time. If the funds are sufficient, an order is created in your store’s Admin panel. You can then create an invoice and capture the funds from the **Orders** section.
 - **Authorise and Capture (most common)** – If this option is selected, an Authorisation (auth) request will be initiated to verify with the card issuer that sufficient funds are available, followed by a Capture request to instruct the issuer to transfer the funds from the cardholder’s account to the merchant’s account. Once transfer is complete, an order and an invoice are created in your store’s Admin panel under the **Orders** section. Refunds, if necessary, should be issued from the **Orders** section.
5. Click **Save Changes** to save your configuration.

Step 3: Configure advanced settings

This step is a continuation of [Step 2](#), and is performed in the **Credorax Payment Solution** section in the **WooCommerce** panel. Here you can configure additional services offered by Shift4.

Note:

To receive any of the additional services you must be registered for them with Shift4. Otherwise, the services will not be enabled even if they are configured according to the instructions below.

To register for additional services, contact your Account Manager.

[Set 3D Secure](#)

3D Secure is an authentication protocol designed for creating an additional security layer for online transactions.

- If you would like to enable the 3D Secure service, set **Enable 3D Secure** to **Yes**.
- If Smart 3D is enabled on your Shift4 account, set **Enable Smart 3D** to **Yes**.

Enable 3D Secure	<input type="text" value="Yes"/>
Enable Smart 3D	<input type="text" value="No"/>

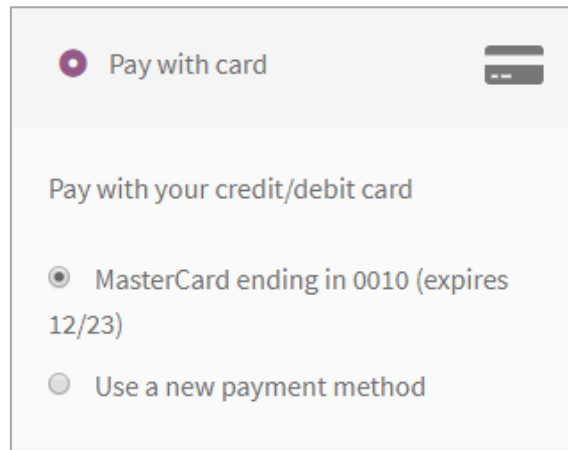
[Set Token \(card-on-file\)](#)

A token (card-on-file) provides your shoppers with a 'quick checkout' option by saving their card data for future purchases.

- If you would like to enable the Token (card-on-file) service, set **Save Cards** to **Yes**.

Save Cards	<input type="text" value="Yes"/>
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During checkout, shoppers with a saved card will be able to either select it or enter a new payment method.



Note:

The Token (card on file) service must be enabled for your account. Otherwise, the service will not be available even if you set **Save Cards** to **Yes**.

When this service is enabled, your shoppers can manage their saved cards under **My Account > Payment Methods**

[Set the Billing Descriptor](#)

A Billing Descriptor appears on the cardholder's statement and contains the name of the business and the relevant transaction information. The descriptor enables the cardholder to identify the transactions on their statement.

- If you would like to enable the Billing Descriptor service, enter the descriptor in the following format: "Merchant DBA Name" + "*" + "City/Customer support number".



Note:

The Billing Descriptor service must be enabled for your account. Otherwise, the information entered here will not appear in the cardholder's statement.

[Set Order Totals & Card Types](#)

You can set the minimum and maximum transaction amounts for payment in your store as well as the supported card types.

- Enter the **Minimum Order Total** and **Maximum Order Total** for store transactions. This disqualifies orders whose total falls below the minimum threshold or exceeds the maximum threshold.

Minimum Order Total	<input type="text"/>
Maximum Order Total	<input type="text"/>

- In the **Credit Card Types** list, select the credit card types that are accepted by your store for processing with Shift4.

Credit Card Types	<input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Maestro <input type="checkbox"/> American Express <input type="checkbox"/> DinersClub
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Note:

Setting credit card types only applies to cards enabled for your merchant account with Shift4. Transactions made with non-Shift4-supported cards and sent to Shift4 for processing will result in transaction failure.

[Enable Debug Mode](#)

You can use this mode to save messages transmitted between your store and Shift4 to debug your integration.

- To enable debug mode, set **Enable Debug Mode** to **Yes**. These messages will be available per order in the **Order Notes** section.

Enable Debug Mode	<input type="text" value="Yes"/>
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[Save Your Configuration](#)

Click **Save Changes** to save your configuration.

Change History

Version	Subject/Date	Description
1.1	January 2024	Rebrand to Shift4
1.0	February 2020	First release

Need Support?

Contact our 24/7 Client Relations Centre for any additional information or technical issue:

EU: +356.2778.0115

UK: +44.20.3608.1288

US: +1.617.715.1977

Email: support.europe@shift4.com