

Green Payment Processing

Gateway Plugin Integration for Shopify eCommerce

Estimated Time: ~5-10 minutes

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Introduction

The GreenPay™ Plugin by for Shopify¹ helps Shopify store owners and merchants to redirect customers to the Secure Green Payment Processing Gateway when customers opt to pay for their order using Green eCheck!

The aim of this document is to explain the procedure of installation and configuration of the plugin on your website. Please be very careful and pay close attention to ALL details in this document as if any one of them is misconfigured, it may cause issues.

Requirements

In order to use the Green Payment Processing Shopify plugin, please ensure that you meet the following requirements:

1. You must have an **active** and fully **approved** Green Merchant Processing Account with [Green Payment Processing](#). If you do not have a merchant account yet, feel free to contact our Customer Support at support@green.money. If your account is still pending approval, you will need to wait before installing!
2. You must have the ability to get into your Green Portal as the first steps of the installation must be done through it after you have logged into your account.
3. Your Shopify store must be SSL secured.

¹ Green Payment Processing does not guarantee compatibility with any other Shopify plugins and is provided as-is. Any changes you wish to be made are made at your own risk.

Installation

Once you have met all the above requirements and you have your API credentials, you're ready to install! Please follow all the steps below and you will be taking payments in no time.

Step 1: Login to your Shopify Store

Login to the administrative portion of your Shopify Store by visiting your **Shopify Administrative Panel**. This is found by navigating in your browser to your store url appended by "/admin".

For example, if my store's name was "Green-Money" then my admin panel URL would be "https://green-money.myshopify.com/admin". Once there you will need to login with your Shopify credentials.

This step may be skipped but the next step of the installation may ask you to login which could interrupt the plugin install process so it's advisable that you go ahead and log in to get this out of the way!

Step 2: Install the Plugin using Green's Easy Installer

Login to your Green Portal by navigating to <https://greenbyphone.com/Login.aspx>. Once you have successfully logged into your merchant account, find the navigation menu to the left of the screen and navigate to **Integrations > Shopify** to find our installation process.

Please enter your shop's information below and click continue to get started!

Installation Process

~5-10 minutes

[Download PDF Instructions](#)

Prerequisites

Before you can begin installation, please make sure of the following:

- Your merchant account is fully active, verified, and capable of processing
- You have signed into your Shopify administrative portal.*

*If this step isn't completed, you may be asked to login to your store after clicking **Install** above which could interrupt the process. If that happens, just come back here and click **Install** again!

On This Page

- [Installation](#)
- [Checkout Settings](#)
- [Payment Provider Settings](#)
- [The Checkout Process](#)
- [FAQs and Common Errors](#)

Now let's get to the installation!

Enter your shop name into the field below and click the **Install** button.

Shop Name

Please only enter the shop name, not the full URL.

[Install](#)

This page actually includes all the instructions you would need to install your store as well so if you like along with animated GIFs showing you exactly where to go. If you like, you can follow along with this PDF or you can close this and simply follow the instructions on this page!

Continuing on, the first step to using the easy installer is to enter your Shopify store name. You will see an input prompting you to enter your Shopify **shop name**. Enter your **shop name** here, press the submit button, and Green will handle the rest. From our example above where our URL was “<https://green-money.myshopify.com/admin>”, we would only want to enter “**green-money**” in the box before pressing submit!

Now let's get to the installation!

Enter your shop name into the field below and click the **Install** button.

Shop Name

.myshopify.com

Please only enter the shop name, not the full URL.

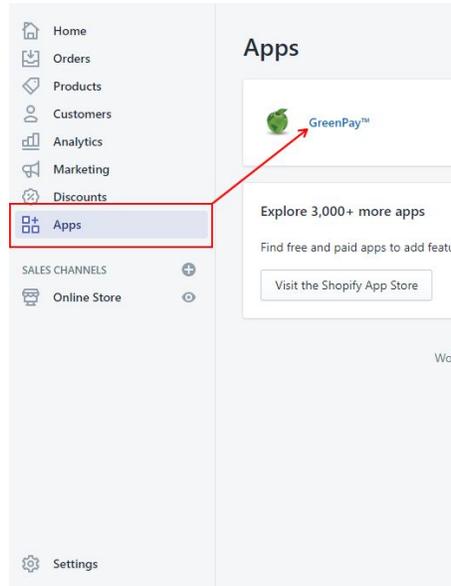
Install

When you hit the install button, you will be sent to your Shopify store where our plugin is requesting various access permissions. Feel free to give these a read if you like, but GreenPay only requests the permissions it needs in order to gather checkout information, receive customer information, and update orders. Go ahead and accept these permissions and Green will take care of the installation in the background and you can move onto the next step.

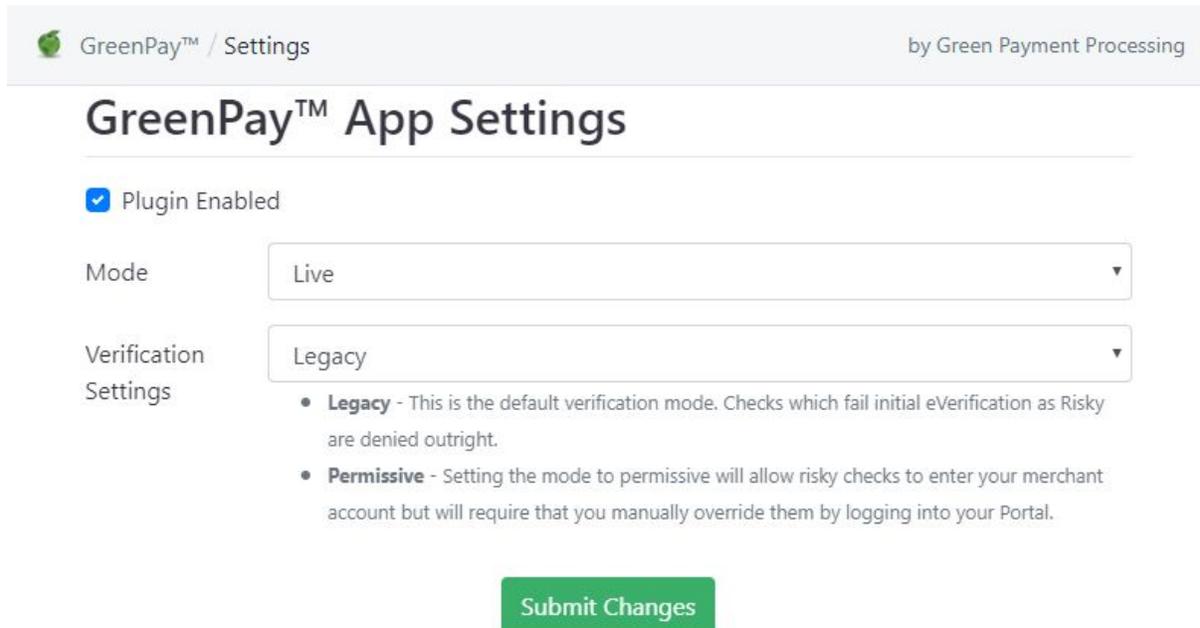
Step 3: Configure The Gateway Plugin

When you accept the permissions to install the plugin, you should be redirected to the configuration screen. If you are not redirected automatically:

1. Navigate back to your **Shopify Admin Portal**.
2. Go to **Apps** in the sidebar.
3. Click the heading for the **GreenPay™** app.



You should see a screen like this:

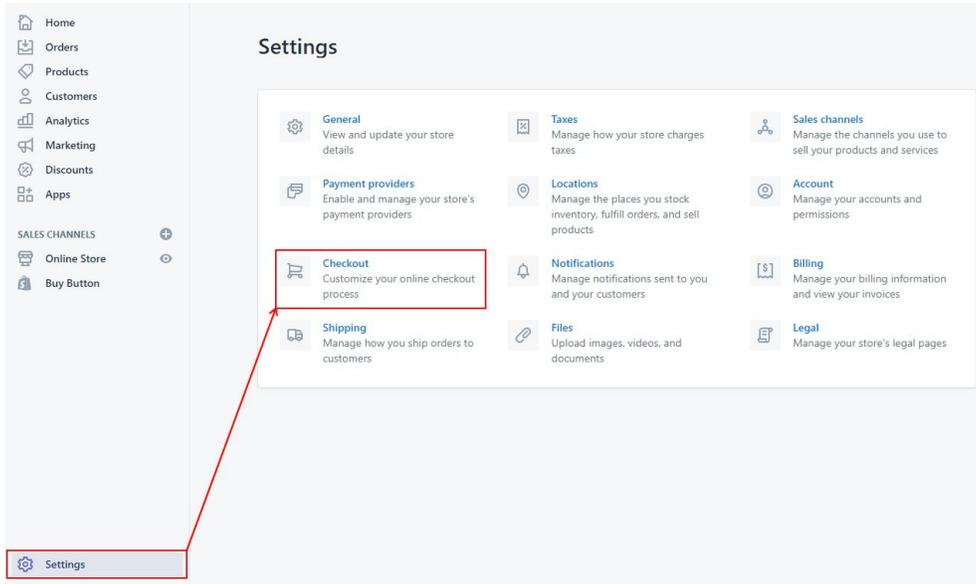


- **Plugin Enabled** - Should be checked most of the time! If this is not checked, then customers will receive errors when they attempt to enter payment information stating your plugin is disabled. This is usually only used when you need to take your store offline for a temporary period.
- **Mode** - This tells the plugin whether it should enter payments into the Live payment processing system or in Test mode. In **Test** mode, no payments will actually be entered but the plugin will act as if it had run the payment. In Live mode, checks will enter the actual payment system and will be processed to your bank account.
- **Verification Settings** - This determines how the plugin should act when a Risky verification occurs. The **Legacy** mode is the default because that is how the plugin has always functioned. Whenever a risky verification is received, the check is denied and the order is not completed in your store. In **Permissive** mode, Risky checks are allowed to enter the system and will require a manual override by you in order to process.

Once you have configured your settings to your liking, hit Submit Changes to save the configuration. The screen will refresh indicating that the changes were saved and you can move onto Step 4!

Step 4: Configure Shopify's Checkout Page

Our plugin has several requirements for making eCheck transactions that Shopify doesn't set by default so we need to update a few things! Navigate in your Shopify Admin portal to Settings > Checkout.



Here, we need to verify a few things. First, make sure that the “Customer Contact” section has set that the store requires Email to check out. **All eCheck transactions coming from a Shopify store must have a valid email!**

Customer contact

Choose which contact methods your customers can use to check out and receive updates. [Learn more.](#)

To check out

Customers can check out using either their phone number or email
Customers who choose to check out using their phone number will get order updates by SMS. This means that their email may not be collected during checkout.

Customers can only check out using email

Then, we must make sure under “Form Options” that the form requires a full name and requires a valid phone number.

Form options

Choose whether your checkout form requires extra information from your customer.

Full name

Require last name only

Require first and last name

Company name

Hidden

Optional

Required

Address line 2 (apartment, unit, etc.)

Hidden

Optional

Required

Shipping address phone number

Hidden

Optional

Required

And lastly, in the additional details section there is a section for “Additional Scripts.” We need to add a value to that text box for the bit of script that will redirect your customers after they pay.

After an order has been fulfilled and paid

Automatically archive the order
Fulfilled orders will be automatically removed from the open orders list.

Additional scripts

```
<script>
var url = window.location.href;
function getParameterByName(name, url) {
if (!url) url = window.location.href;
```

Any customizations you'd like to appear on the order status page of the checkout. Learn more at the [Shopify Help Center](#).

In this textbox, please enter the following, copying exactly:

```
<script type='text/javascript'>
(function () {
  var gm_db_gateways = [];
  var gm_full_gateways = [];
  {% for transaction in checkout.transactions %}
  {% assign gateway = transaction.gateway | lowercase | strip %}
  {% assign gateway2 = transaction.gateway2 %}
  gm_db_gateways.push("{} gateway {}");
  gm_full_gateways.push("{} gateway2 {}");
  {% endfor %}

  for (var i = 0; i < gm_db_gateways.length; i++) {
    if (gm_db_gateways[i].includes("greenpay") || gm_db_gateways[i].includes("green pay")) {
      if (Shopify && Shopify.Checkout && Shopify.Checkout.OrderStatus) {
        var id1 = "{} checkout.order_id {}";
        var id2 = "";
        var redir = false;
        var href = "";
        var p = "";
        if (Shopify.checkout) {
          id2 = Shopify.checkout.order_id.toString();
        }

        if (id1.length === 0 && id2.length === 0) {
          p = "<p>An unexpected error occurred while Shopify attempted to gather your checkout information to send to the secure payment processor. Please contact this store's support and ask them to send you the Checkout Page Link manually to complete your payment.</p>";
        } else {
          {% if first_time_accessed %}
          redir = true;
          {% endif %}

          href = "https://greenbyphone.com/Shopify/Checkout.aspx?shop=" + encodeURIComponent(Shopify.shop) + "&id=" +
(id1.length > 0 ? id1 : id2);
          p = "<p>You should have been redirected to a Secure Checkout Page when this page was first opened. If you were not sent there automatically or you have not completed your payment, <a href='" + href + "' target='_blank' title='Pay via GreenPay'>click here to complete your checkout</a>!</p>";
        }

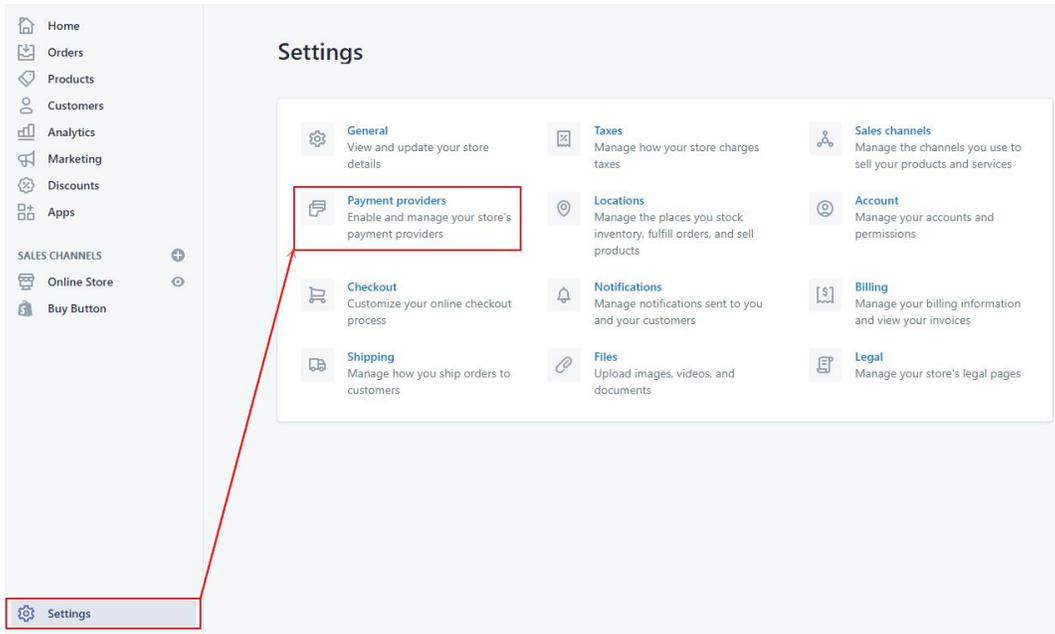
        Shopify.Checkout.OrderStatus.addContentBox(
          "<h2>Pay via " + gm_full_gateways[i] + "</h2>",
          p
        );

        if (redir === true) {
          window.location.href = href;
        }
      }
    }
  }
})();
</script>
```

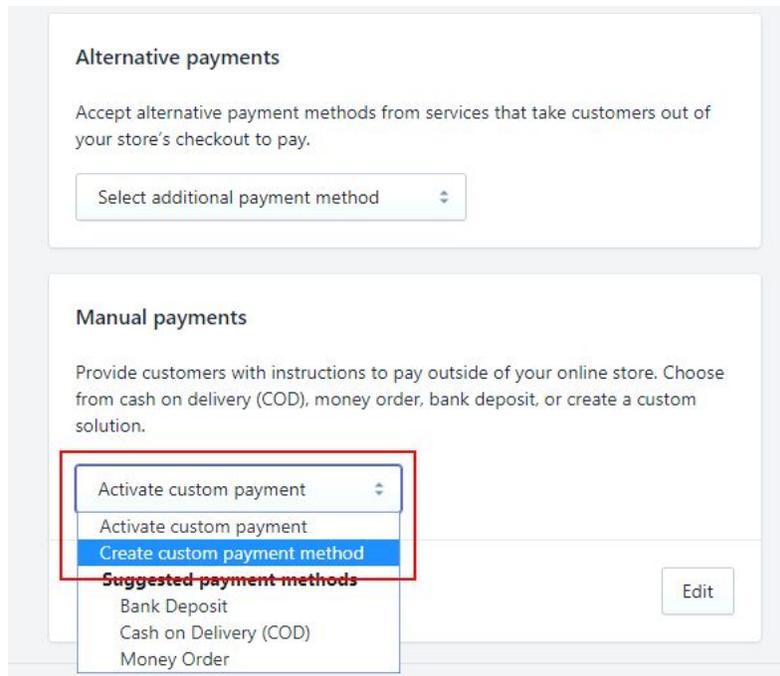
Once that is done, make sure to hit "Save" before moving onto the next step!

Step 5: Configure The Payment Provider

Once more navigate back to the **Settings Page**, then **Payment Providers**



Here, scroll down to the “**Accepts Payment**” block and down to “**Manual Payments.**” In here, click the dropdown and select “**Create Custom Payment**” and a small form will appear.



- Name of the custom payment method: Must include the word GreenPay!² We recommend making it simply “GreenPay” or something along the lines of “GreenPay eCheck” to make it clear to customers how they are paying.
- Additional Details: These are displayed at the checkout screen and give your customer information on the payment method. You can enter anything you want here! In the example above, we used the text: “With GreenPay eCheck, you can securely pay for your order with a direct bank account debit. After checkout, you will be redirected to a secure checkout page to enter your bank account information.”
- Payment instructions: Leave these blank!

Once all the information is filled out, hit Activate to save and that’s it! Your store should now be ready to take your customer’s payments using Green!

² If the payment method does not contain “GreenPay”, then the redirect will fail and your customers payments will not go through.

Checkout Process and Order Flow

For an animated live view of how this functions, we recommend seeing the installation page in your Green Portal as it walks through the full checkout process! You can find this by logging into your Green Portal at <https://greenbyphone.com/Login.aspx> and then navigating to **Integrations > Shopify**.

Because we are a third-party payment provider for Shopify, the plugin may work slightly differently than some gateways provided directly with Shopify. Using the GreenPay plugin, checkout will work as follows:

1. The customer shops in your store and adds items to their cart. When ready, they go to checkout.
2. The customer enters their personal information, selects shipping, applies any potential discounts, etc. They then select to pay using the GreenPay gateway and select to continue/complete their order.
3. At this point, the Order is generated in your Shopify system and set to a Pending status. The GreenPay plugin has no control over this creation or any emails sent by Shopify at this point when the order is created.
4. After the Order is created, the customer is redirected to our Secure Checkout Page with their Order information and they are prompted to complete the checkout by entering their bank routing and account number. When they click to checkout, our system verifies the information entered and then creates the check.
 - a. If the check comes back as Bad, then the customer is shown an error stating as such and is asked to give alternative routing and account numbers.
 - b. If the check comes back as Risky and your plugin Verification Settings are set to **Legacy** then the customer will be shown an error stating as such and is asked to give alternative routing and account numbers.
 - c. If the check comes back as Risky and your plugin is set to **Permissive** or the check comes back as good, then the check is generated and the customer is given a confirmation page.
5. At this point we will assume the check went through! Our service will add an order note as soon as the check is received by Green stating that the check was received and is pending processing. This note will include the Check ID so that you can search it if you need. If the check was risky, the note will state that and some information about manually overriding it.
6. Once the check is processed by Green during a check batch (9am and 2pm EST) then our service will reach out and update your Order status to Paid so that you know the check is headed to your bank and should be good to go!

Important Notes

1. The custom payment method name must be **GreenPay** or include in it somewhere the word **GreenPay**. If you have accidentally created a payment provider with the wrong name, don't worry! You can really quickly create a new custom payment method with the correct name and just disable the old one and your plugin will start functioning right away.
2. If Phone Numbers are not set to required, the payment will fail with an "Invalid Phone Number" error. All eCheck transactions must have a valid customer phone number.
3. Payments can be marked as "Cancelled" for one of two different reasons. When an order is marked as cancelled, a note is made on the order in Shopify to state that it was cancelled. The reasons an order can be cancelled are as follows:
 - a. The customer did not complete the payment process either because they closed the browser window before submitting their info or they explicitly pressed the "Cancel" button at our Checkout.
 - b. The customer's routing and account number failed our mandatory eVerification service as being Risky/Bad and they didn't enter any valid information thereafter to fix the problem.
4. **You cannot make test payments using your own information!** Our system does not allow you to make eCheck payments from yourself to yourself as most banks would flag that as fraudulent. This means if you intend to make a test order, you must use either a customer's information or some dummy information that is not on file with your Green Merchant Account.³

³ Any tests entered into our Live API must be deleted by you before our batch times at 9am and 2pm EST or else your account will be charged for them.

FAQ

We keep getting Invalid Phone Number (999)-999-999 errors at checkout!

This can be caused by two different issues, but one is more likely than the other! In very rare cases, this is caused by formatting issues. Our system does the best it can to try to read various formats including international format (using the +CountryCode identifier) as well as any number of different character separators, and no separators, but if any weird or odd characters are passed then it could be a formatting issue. All phone numbers should be at least 10 digits and we recommend they be separated by hyphens, though Shopify dictates how they are sent so this should not be your problem.

More likely is that you're attempting to run a test check and you're using your own information. Remember, [you cannot use your own information!](#)

What about an "Invalid Email Address" error or "Cannot create checks using Client's routing and account number."

Much like the above, it's possible that it's a formatting issue with the email but more than likely it's being caused by attempting to use your own information at checkout that we have on file with your Green Account. Email addresses should be in the format of "[name@domain.com](#)"

My customers aren't being redirected after they complete the order!

Have you double checked your configuration? We would recommend starting over at step 3 and making sure every detail has been double checked! The most common causes for this are the "Additional Script" not being added or the "Custom Payment Method" having a name other than "GreenPay" or not including "GreenPay" at all. If you have already created a Custom Payment Method with a different name, we haven't found a way to edit the names after they're created so you'll need to deactivate the incorrect one in your store and create a new one with the correct name!

If you've double checked everything and your customer still isn't being redirected, it's possible that your customer's device is preventing the redirect. If you have a customer affected by this issue: Log into your Shopify Admin Portal, navigate to the order for that customer, and there should be a dropdown for **More Actions** near the top right. In this dropdown, click **Get**

Checkout Page Link to receive a direct link you can provide your customer to complete payment!

If you still have further questions or believe there to be a true problem with your integration, please send a request to support@green.money with the subject line: "Check My Shopify Integration" in it and please include in the body of the email your Shopify Store URL.

Once we receive that, you'll get a follow up from us on how to move forward with your issue and our team will be on the case!

Please keep in mind that this service is subject to programming representative availability and is subject to a 24-48 business hour average turnaround time.

I would like to test payments using your Sandbox API

Due to the way Shopify requires us to integrate with their new plugin platform, we are unable to hook the new plugin up to our existing Green Sandbox platform to test payments through the full process, however we have set up a Test Mode for the plugin that will allow you to run tests in your store without entering payments into our live eCheck system.

During the installation and configuration process under the GreenPay plugin settings you can change the Mode from Live to Test. In Test mode, the plugin will not enter any live payments into our system. Instead, in this mode, the Shopify system will create the plugin and then based on the bank account information you give us at checkout, our system will respond in various ways so you can see exactly how the plugin will react for a valid check vs. a Risky check.

Valid Check	<p>Routing Number 000000000</p> <p>Account Number 100001</p> <p>Using this in Test mode will simulate a valid check being created. The system will mark the payment as completed and add order notes to your Shopify order that simulate the receipt of the check, then the processing of the check.</p>
Risky Check	<p>Routing Number 000000000</p> <p>Account Number 100002</p> <p>If your Verification Settings are set to Legacy, then using this combination will simply prevent the payment from going through. Customers will be shown an error at checkout and will be required to enter a different routing and account number. If your Verification Settings are instead set to Permissive, then the checkout will complete and order notes will be added to your Shopify order which simulate the receipt of the check.</p>