



ValorPay

Installation and

User Guide



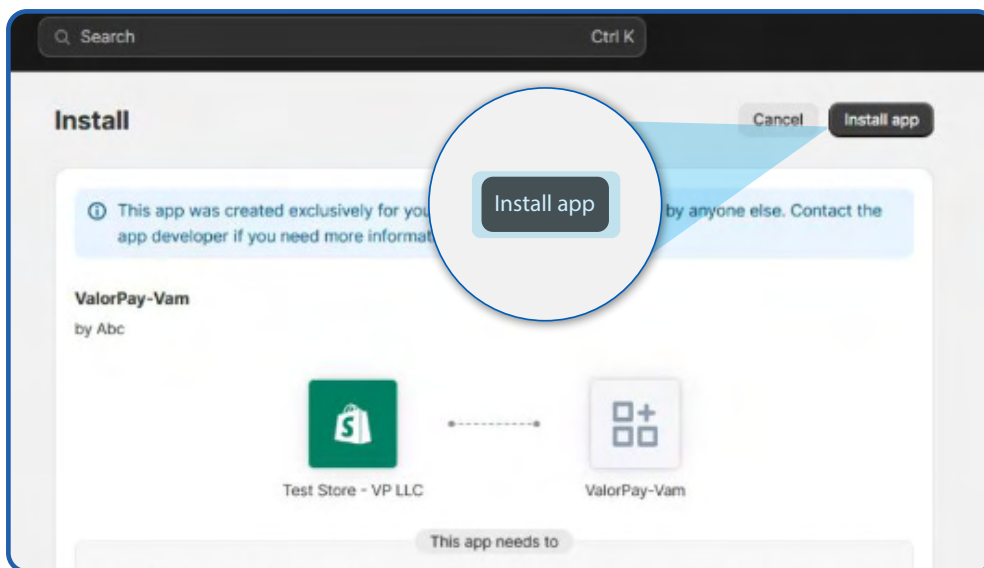
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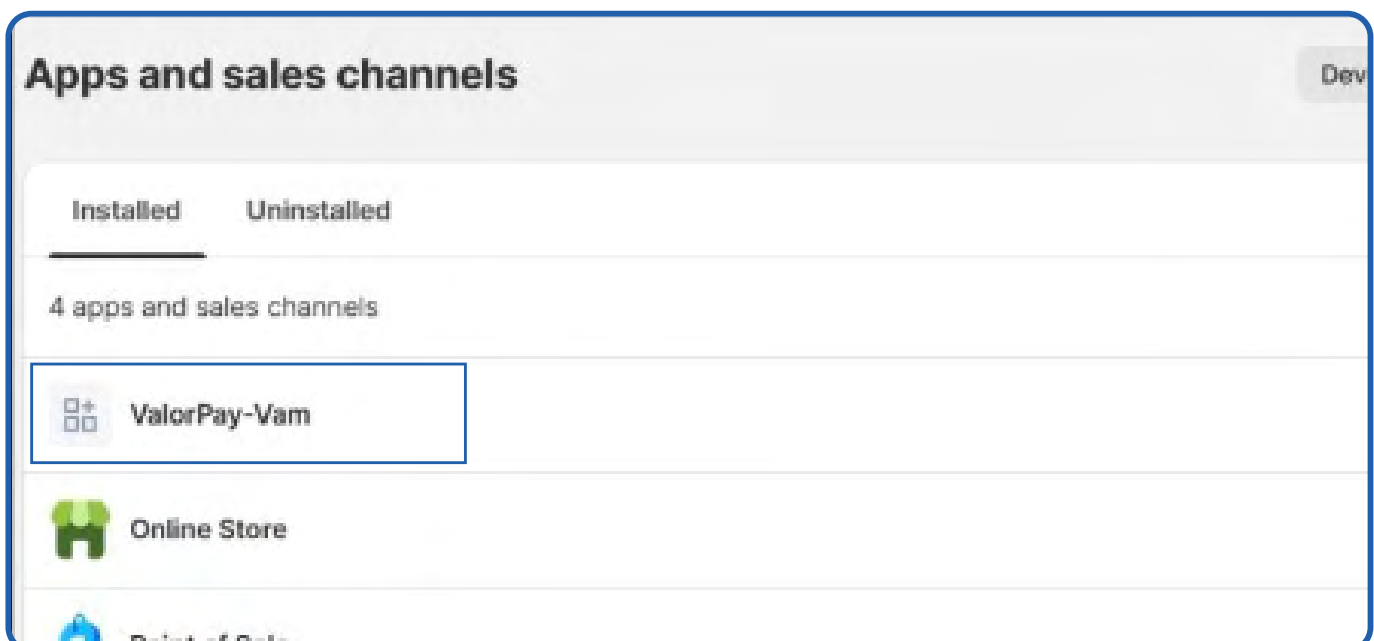
INSTALLING THE APPLICATION

The installation process consists of general installation plus copying a JS code to store settings.

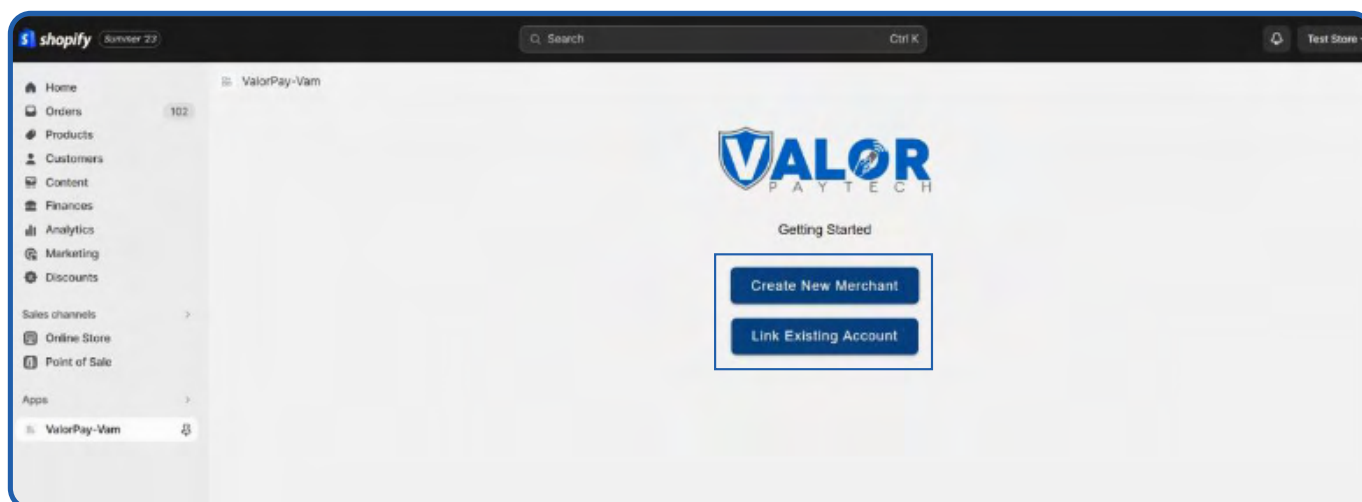
1. Login to your Shopify store **admin**.
2. Paste the unique installation link into the address bar of your browser (provided to you by **ValorPay**).
3. You will see the screen below.
4. Click **Install app**.



5. After installation is complete, click on **Apps** in the left pane, select and open the application.

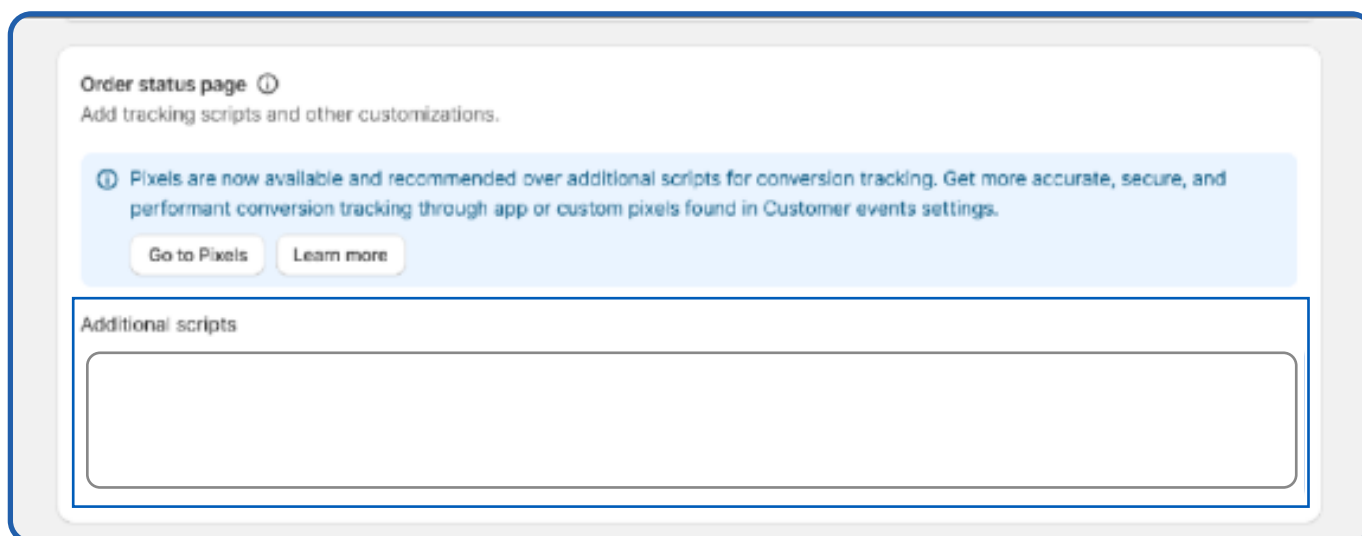


6. Land on the application dashboard.



SETTING THE ADDITIONAL JAVASCRIPT CODE

1. In your store, click **Settings -> Checkout**
2. Scroll down to find 'Order status page'



3. Copy the following **JavaScript code** from the following link "<https://valorapi.readme.io/reference/shopify-application-guide#setting-the-additional-javascript-code>" and paste it under 'Additional scripts' and click '**Save**'.

4. Go to **Settings** -> **Payments** -> click **Add manual payment method** select **Create a custom payment method**.
5. Enter the custom payment method name and add the additional details, then click **Activate**.

Set up manual payment method [X]

Custom payment method name
Pay via ValorPay

Additional details
3% surcharge (non-cash charge) will be added on the payment page.

Displays to customers when they're choosing a payment method.

Payment instructions
[Empty text area]

Displays to customers after they place an order with this payment method.

[Cancel] [Activate]

6. The installation process is complete.

Setup the application using your ValorPay keys and start using the application.

GENERATING API KEYS

OBJECTIVE

To perform any request on Valor virtual terminal, one should have the following credentials:

APP ID

- APP ID It represents the merchant API; A merchant can create an APP ID using the Valor portal

APP KEY

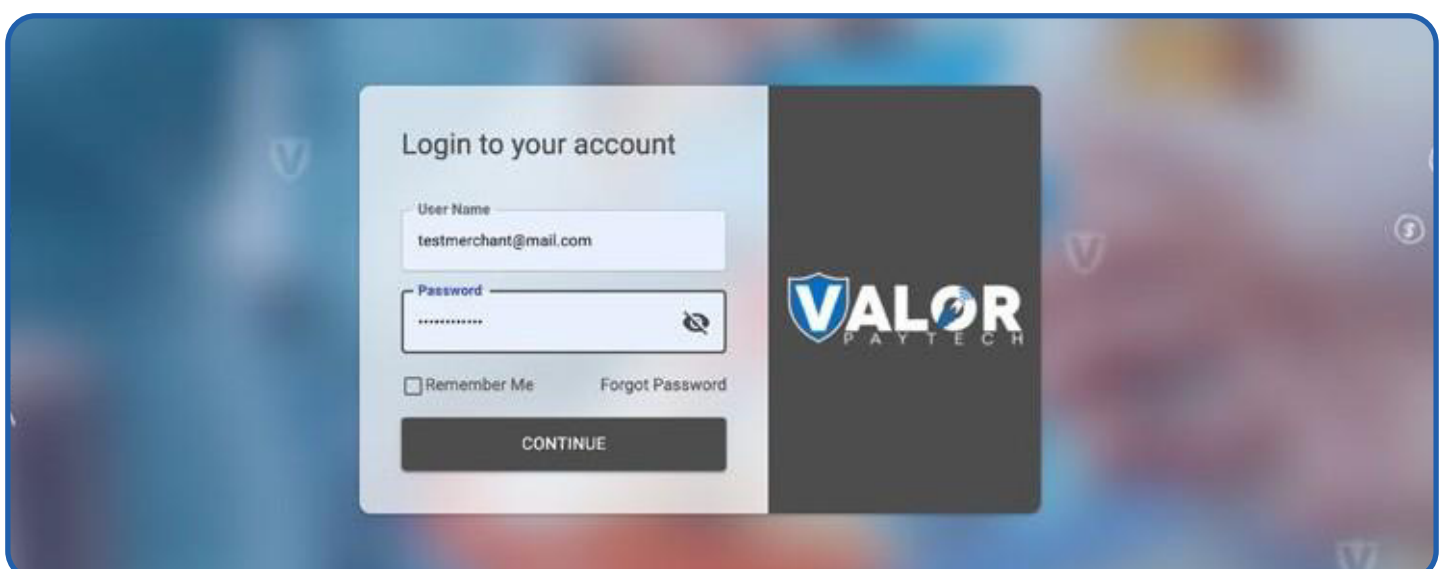
- APP KEY represents the EPI of the merchant, technically a merchant can have only one APP ID but based on the count of the API KEY, a merchant can have several API KEYS
- Merchant can create their own API KEY using the Valor portal

EPI

- Basically **EPI** is an **End Point Identifier**, Identify the device on valor infrastructure, any devices including virtual terminal will be identified as an EPI, typically its a 10 digit number start with 2.

STEPS TO CREATE APP ID AND APP KEY

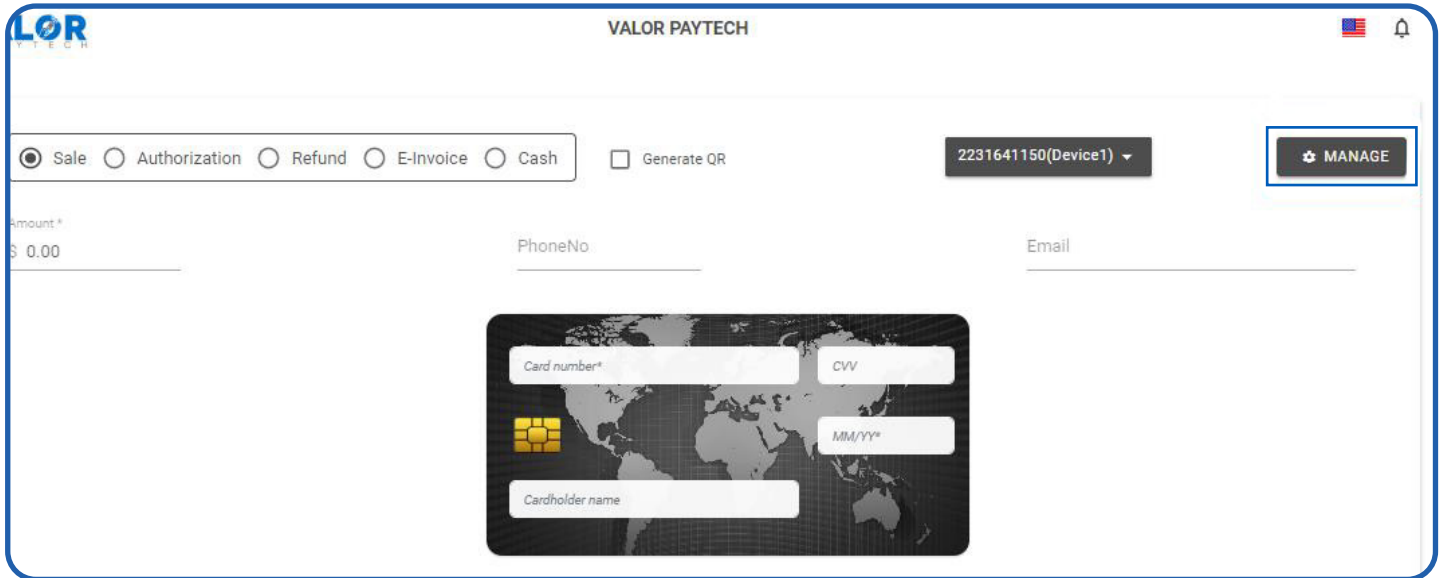
STEP 1 - Login to The Valor Portal



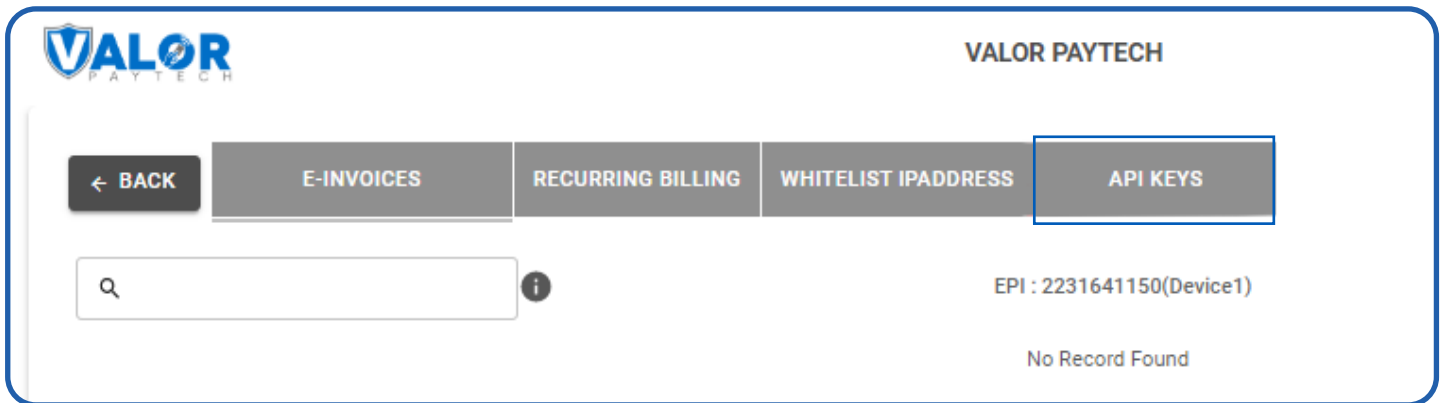
STEP 2 - Click Virtual Terminal in Menu



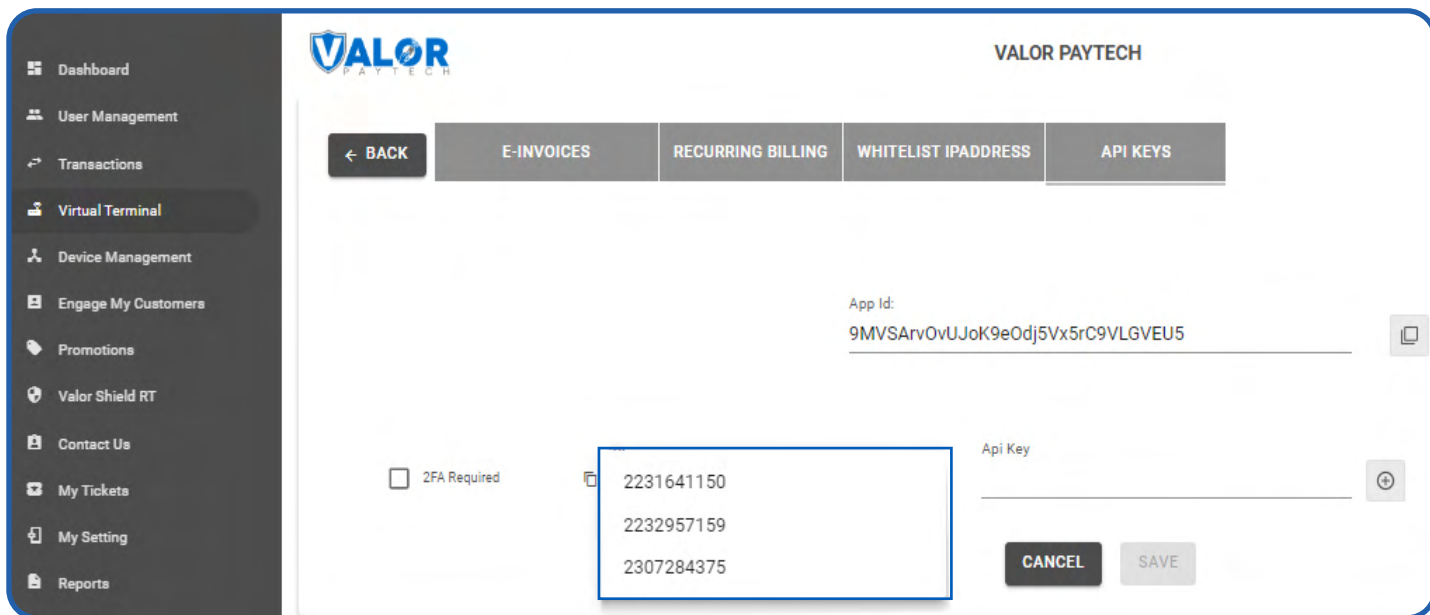
STEP 3 - Click on 'Manage' Button



STEP 4 - Select API KEYS Tab



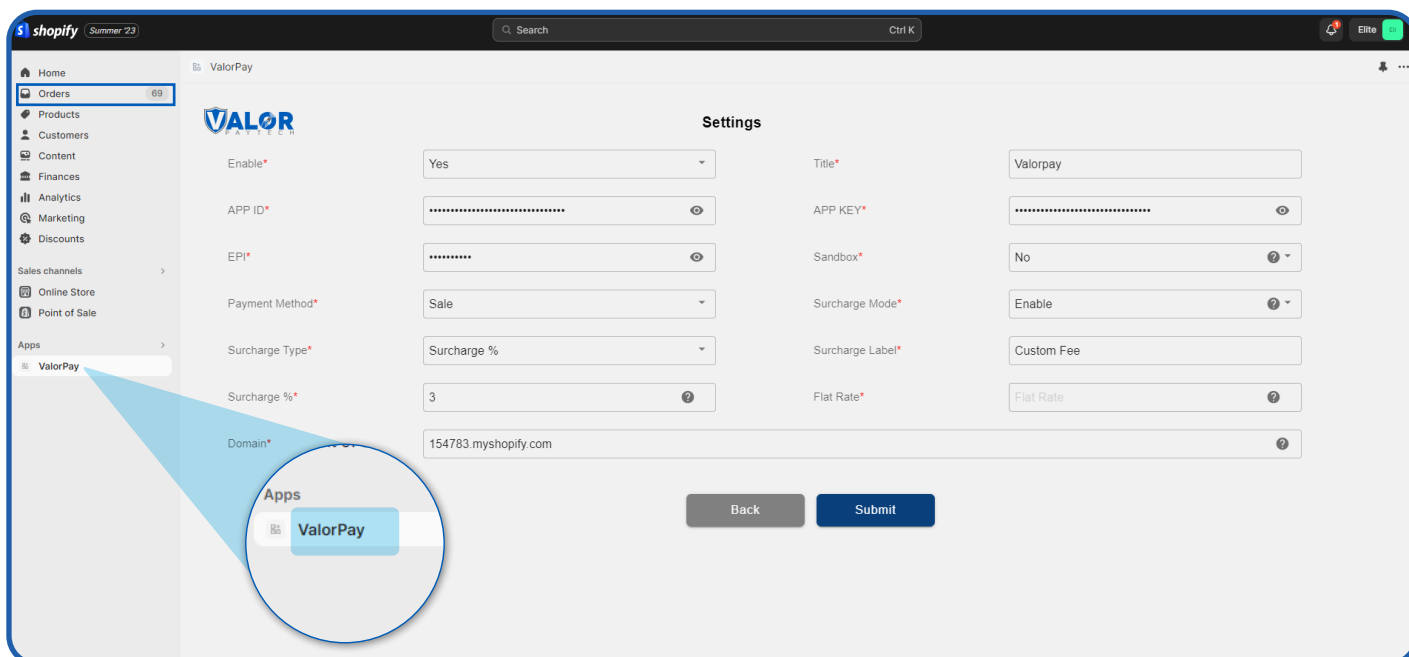
STEP 5 - Here you need to select the **EPI** to generate **APP** Key.



STEP 6 - Enter these keys to the settings tab of the ValorPay application, choose your settings and click '**Submit**'

CONFIGURATION

To configure the application, login to Shopify, move to Admin **Home** -> **Apps** -> **ValorPay**, where you can find various settings to configure the extension.



- **Enable ValorPay:** **Yes** or **No** ValorPay Payment Gateway for your BigCommerce store.
- **Title:** Enter **Title** for the ValorPay payment method to be shown in the frontend.
- **Use Sandbox:** Set **No** if Production Keys are set or Set **Yes** if Sandbox Keys are set then Live payments will not be taken.
- **APP ID, APP KEY & EPI:** Set Production Valor API keys or If Sandbox **Yes**, then Sandbox API keys.

Read here [Generating API KEYS \(E-Commerce\) | Valor PayTech](https://valorpaytech.com/kb/merchant-generating-api-keys-e-commerce/)

<https://valorpaytech.com/kb/merchant-generating-api-keys-e-commerce/>

- **Payment Method:** Select one of the payment methods for the payment capture.
- **Sale:** Authorizes and captures the order amount immediately.
- **Auth Only:** Authorizes and validates card for the order amount. The admin needs to manually capture the amount (by generating invoice using "Capture Online" option) within the authorization hold period.
- **Surcharge Mode:** Set **Yes** if you want all transactions on surcharge mode. Merchant must have a Surcharge MID for it to function.
- **Surcharge Label**
- Set **Surcharge Type - Surcharge %** or **Flat Rate \$**
- **Surcharge%** - Percentage will apply only on enabling surcharge Indicator to true and Surcharge type is set to **Surcharge %**.
- **Flat Rate \$** - Flat rate will apply only on if **Enable** surcharge mode is true and Surcharge type is set to **Flat Rate \$**.
- **AVS** - The address verification service will add a text field to the checkout page based on the selected option.
- **Domain:** To set the store domain eg: **store.myshopify.com**.

CHECKOUT PROCESS FOR THE BUYER

1. This is an example of how a customer will see the **ValorPay** payment method on your store after you have enabled it. They will experience a quick and secure checkout with their items.

Contact

Email or mobile phone number
jhonsmith@valorpaytech.com

Email me with news and offers

Delivery

Country/Region
United States

First name (optional)
Jhon

Last name
Smith

Address
2nd Avenue

+ Add apartment, suite, etc.

City
California

State
California

ZIP code
90001

Did you mean [Los Angeles?](#)

Save this information for next time

Shipping method

Standard \$20.47

Payment


All transactions are secure and encrypted.

ValorPay

3% surcharge (non-cash charge) will be added on the payment page.

Billing address

Same as shipping address



Laptop

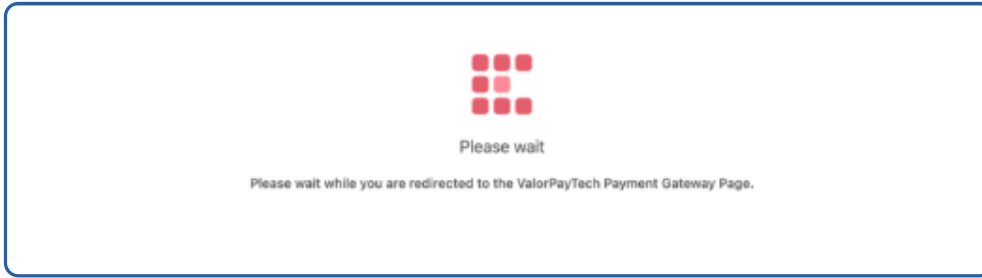
Subtotal

Shipping

Estimated taxes ⓘ

Total

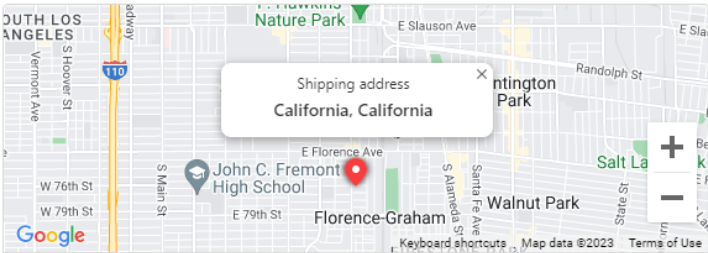
2. The buyer will be redirected to **ValorPay's** payment page.



3. Upon successful payment your order will be confirmed. The transaction details can be seen here.

Valorpaytech LLC

Order #1098
Thank you, Jhon!




Your order is confirmed
You'll receive an email when your order is ready.

[Track order with Shop](#)

Email me with news and offers

ValorPos payment completed for USD 42.37 and Custom Fee USD 0.6. Transaction ID: 5113051 Approval Code: TAS681 RRN: 326805501361

Order details	
Contact information jhonsmith@valorpaytech.com	Payment method ValorPay - \$42.37 ValorPay - \$42.37
Shipping address Jhon Smith 2nd Avenue	Billing address Jhon Smith

 Laptop
Subtotal
Shipping
Taxes
Total

ORDER DETAILS IN THE SHOPIFY ADMIN

1. The order will show in the **Orders** section of Shopify admin.

Order	Date	Customer	Channel	Total	Payment status	Fulfillment status	Return status	Items	Delivery method
#1098	Today at 11:27 am	Jhon Smith	Online Store	\$42.37	Paid	Unfulfilled		1 item	Standard
#1095	Thursday at 12:14 pm	Jhon Smith	Online Store	\$21.41	Payment pending	Unfulfilled		1 item	Standard
#1093	Sep 15 at 11:21 am	Jhon Smith	Online Store	\$41.95	Authorized Expiring	Unfulfilled		1 item	Standard
#1092	Sep 14 at 5:50 pm	Jhon Smith	Online Store	\$41.95	Paid	Unfulfilled		1 item	Standard
#1090	Sep 14 at 12:47 pm	Jhon Smith	Online Store	\$42.12	Payment pending	Unfulfilled		1 item	Standard
#1089	Sep 12 at 6:17 pm	Jhon Smith	Online Store	\$64.30	Authorized Expiring	Unfulfilled		2 items	Standard
#1088	Sep 12 at 5:47 pm	Test Card	Online Store	\$42.55	Payment pending	Unfulfilled		1 item	Standard
#1087	Sep 12 at 5:47 pm	Jhon Smith	Online Store	\$20.50	Partially refunded	Unfulfilled		0 items	Standard
#1086	Sep 12 at 5:41 pm	Test Card	Online Store	\$160.50	Paid	Unfulfilled		7 items	Standard
#1085	Sep 12 at 5:25 pm	Jhon Smith	Online Store	\$130.00	Partially refunded	Unfulfilled		5 items	Standard
#1084	Sep 12 at 5:19 pm	Jhon Smith	Online Store	\$239.50	Payment pending	Unfulfilled		10 items	Standard
#1083	Sep 12 at 5:17 pm	Jhon Smith	Online Store	\$42.40	Payment pending	Unfulfilled		1 item	Standard
#1082	Sep 12 at 4:22 pm	Jhon Smith	Online Store	\$42.37	Payment pending	Unfulfilled		1 item	Standard
#1081	Sep 11 at 4:09 pm	Jhon Smith	Online Store	\$42.37	Authorized Expiring	Unfulfilled		1 item	Standard
#1080	Sep 6 at 6:06 pm	Jhon Smith	Online Store	\$42.36	Partially refunded	Unfulfilled		1 item	Standard
#1078	Sep 5 at 4:51 pm	Jhon Smith	Online Store	\$64.35	Partially refunded	Unfulfilled		2 items	Standard

2. **View order details:** Click on the order to view its details. Note the transaction details in the Notes section towards top right.

Unfulfilled (1)

Laptop \$20.00 × 1 \$20.00 **Fulfill Item**

Paid

Subtotal	1 item	\$20.00
Shipping	Standard (0.0 kg)	\$20.47
Tax	Show tax rates	\$1.90
Total		\$42.37

Paid by customer \$42.37

Notes

ValorPos payment completed for USD 42.37 and Custom Fee USD 0.6.
Transaction ID: 5113051
Approval Code: TAS681
RRN: 326805501361

Customer

Jhon Smith
2 orders

Contact information

jhonsmith@valorpaytech.com
No phone number

Shipping address

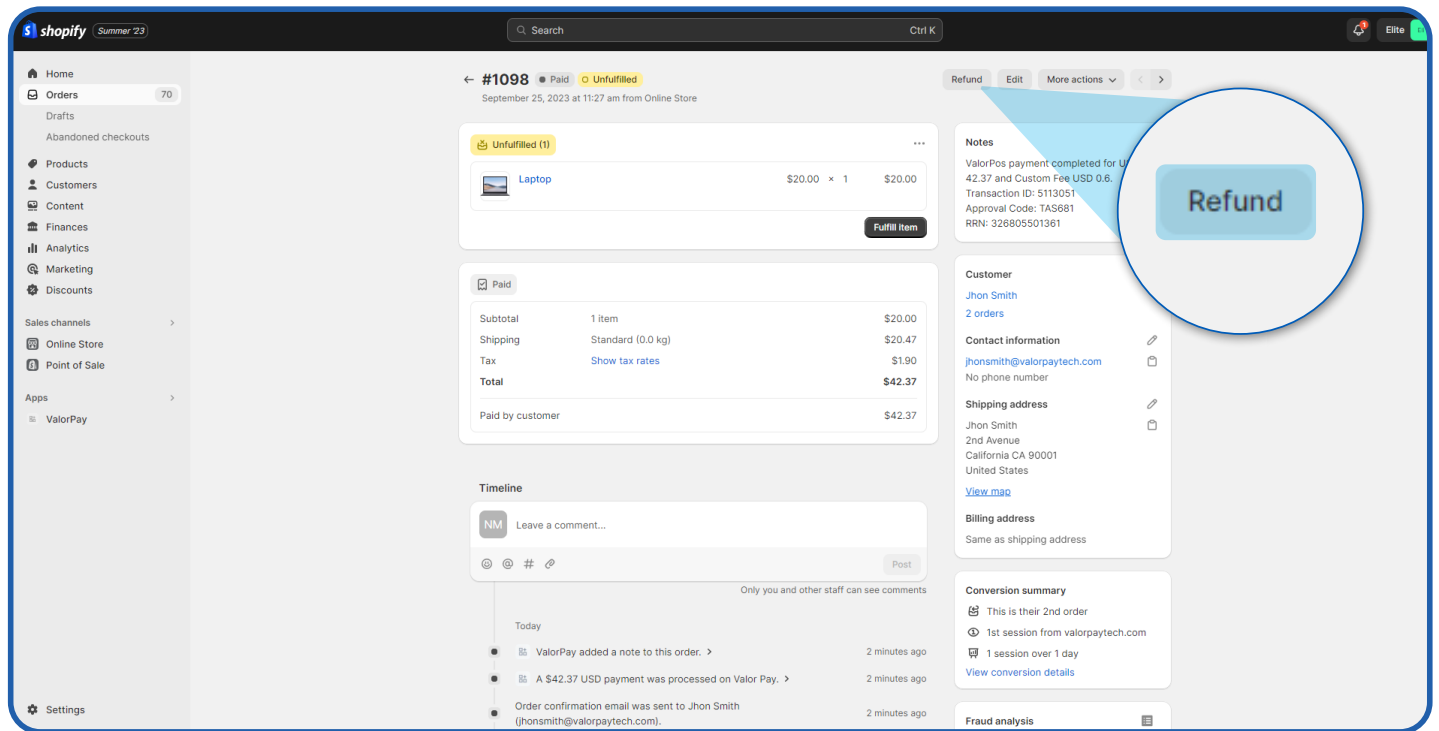
Jhon Smith
2nd Avenue
California CA 90001
United States
[View map](#)

Timeline

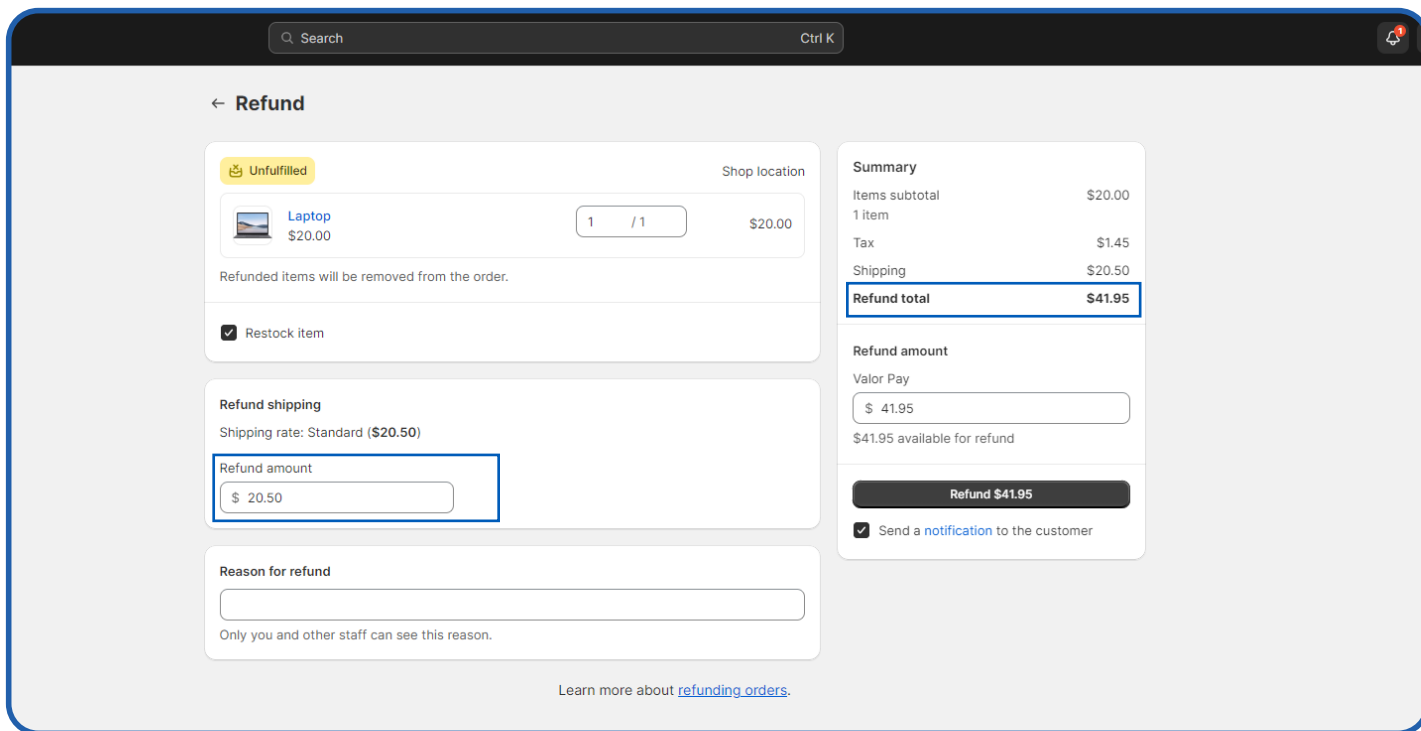
REFUND PROCESS FOR SHOPIFY ADMIN

Refund process for Shopify Admin an order can be marked for refund following which it will appear on the '**Refund Order**' page of the ValorPay application. Admin can pay for refund orders using ValorPay payment gateway from the application.

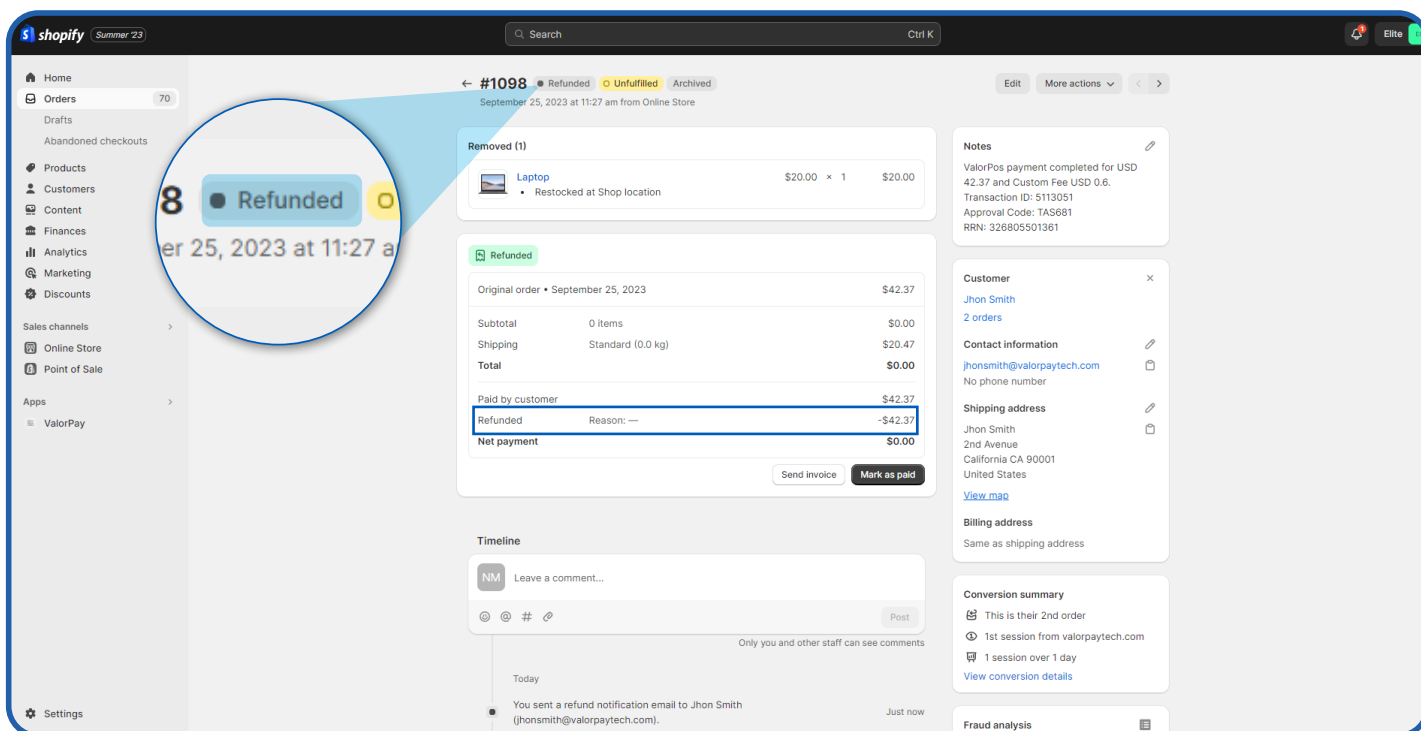
1. Open an order, click on '**Refund**'.



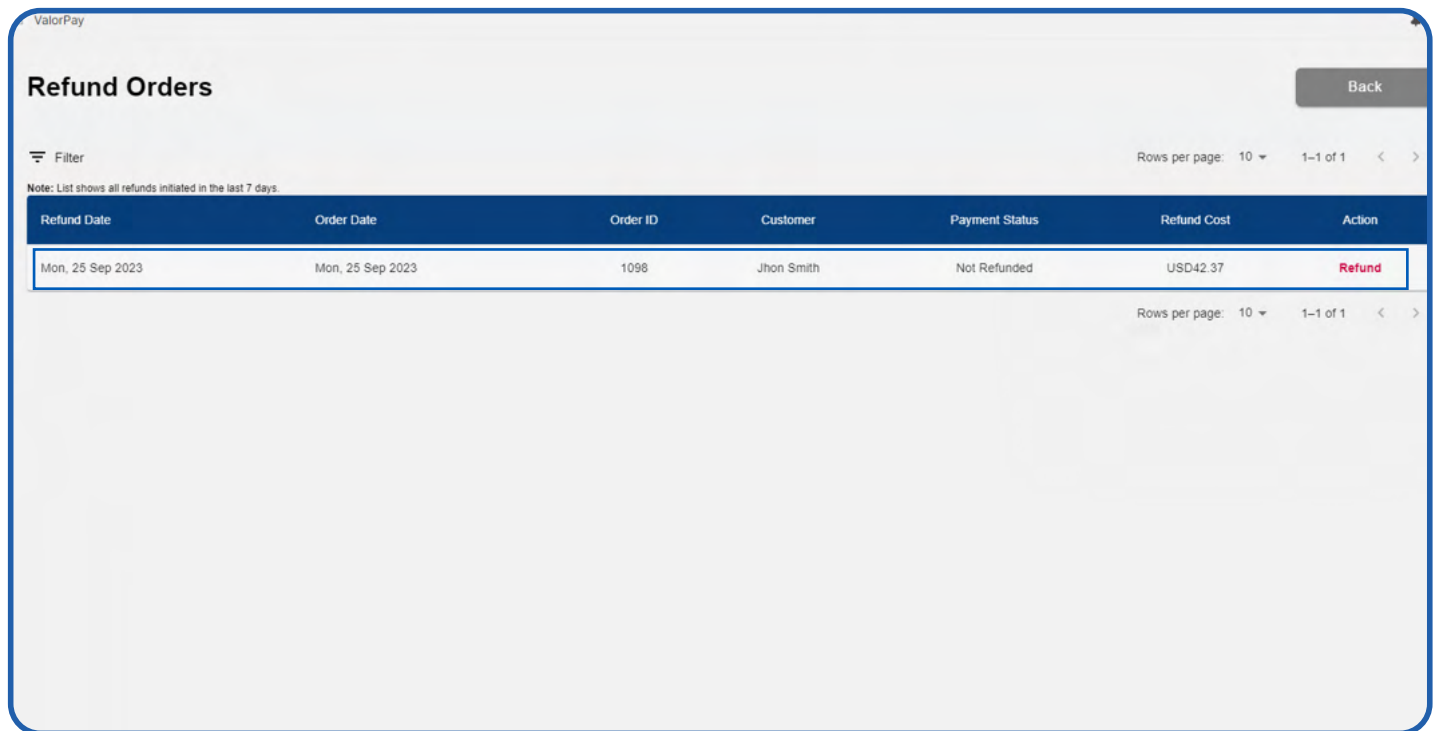
2. Enter details for the refund and click on '**Refund**'. (highlighted) If full amount is refunded, then the status will be changed to Refunded, if a part of total amount is refunded, the status will be set to '**Partially Refunded**'



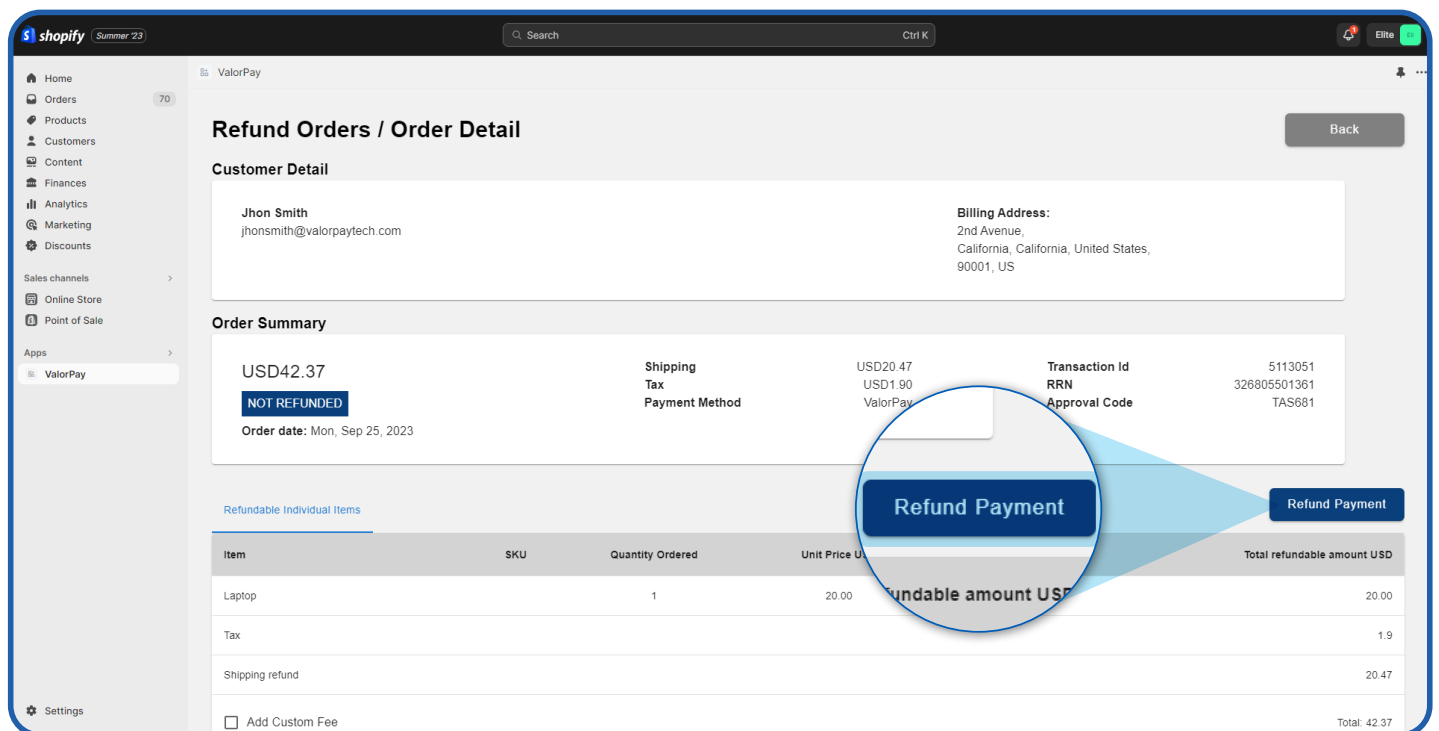
3. The order has been marked for a refund. This refund order will now be visible on the 'Refund Order' page on the ValorPay application. (Note that the amount is not refunded yet. It needs to be refunded from the ValorPay application.)



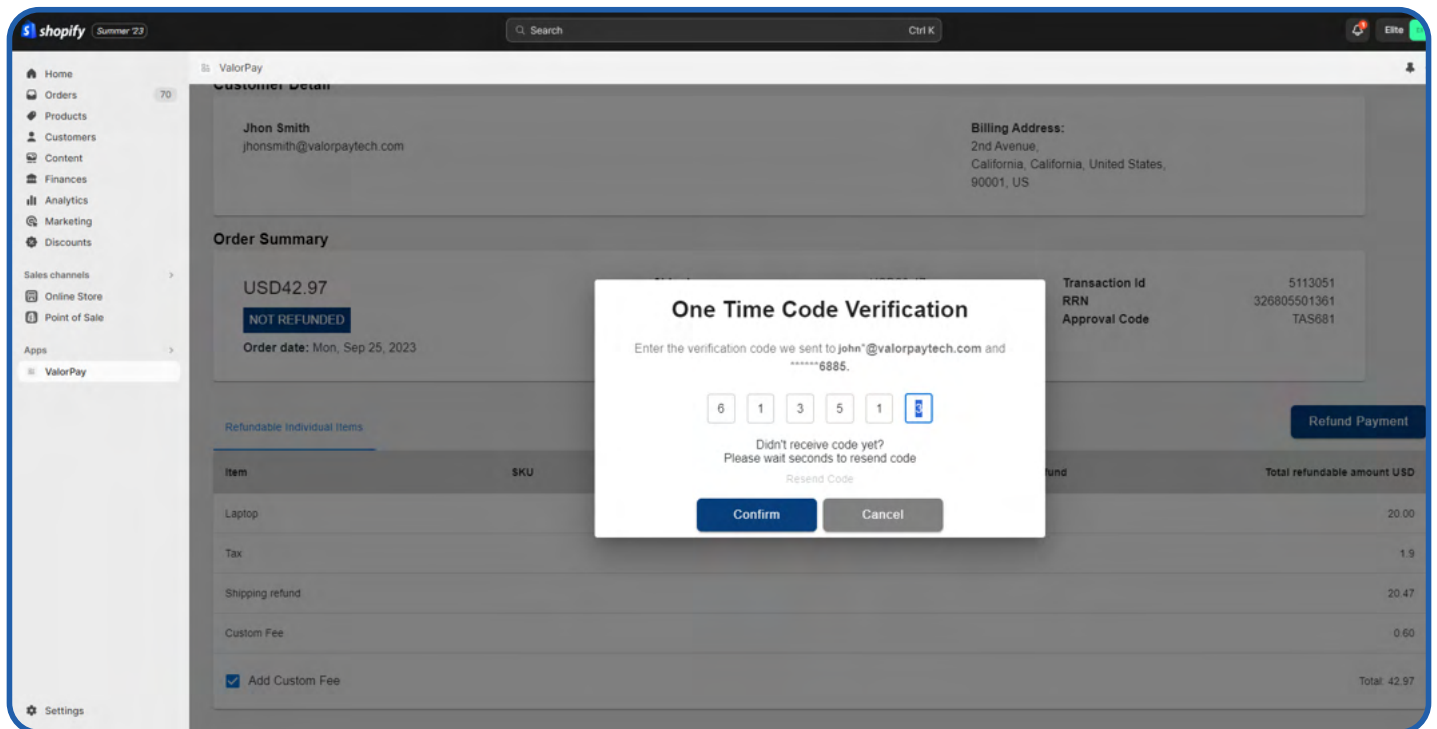
- Open **ValorPay Application** -> Click on **Refund Orders** Locate the order by Order ID and click **'Refund'**. (highlighted) By default, this list only shows orders that have been marked for refund or refunded in the last seven days. To see orders for any duration, click on **'Filter'** and select the desired duration.



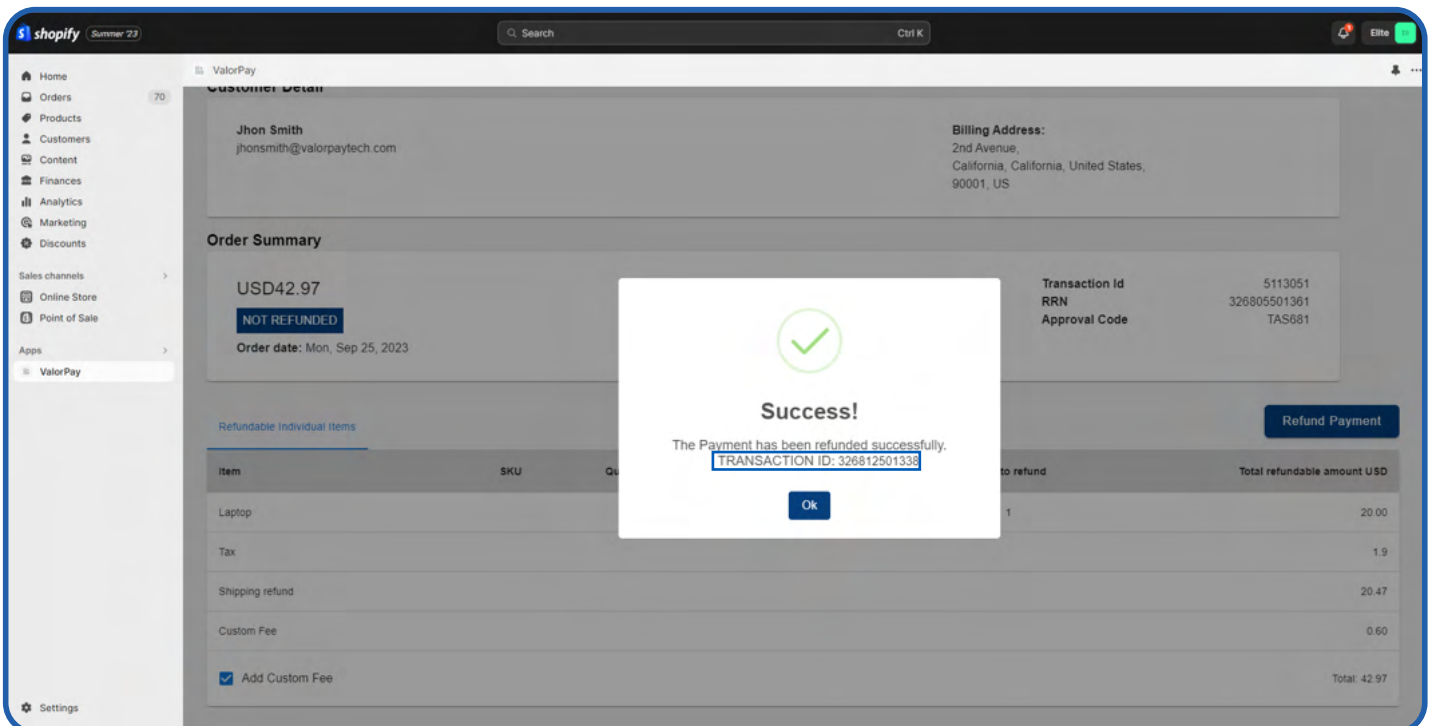
- Verify the refund details including amount. If you wish to refund any custom fees, it can be done using the **Add checkbox** on the bottom left.



- Click on 'Refund Payment'. Enter the **OTP** registered on your registered mobile phone and email address.



- The **Refund** payment is successfully completed.



8. Locate the confirmation & details of the refund payment at the bottom of the page.

The screenshot shows the Shopify admin interface for a refund order. The page title is "Refund Orders / Order Detail". The customer detail section shows the name "Jhon Smith" and email "jhonsmith@valorpaytech.com". The billing address is "2nd Avenue, California, California, United States, 90001, US". The order summary shows a total refund amount of "USD42.97" with a "REFUNDED" status. A callout bubble highlights this amount and status. Below the summary is a table of refundable individual items:

Item	SKU	Qty	Unit Price USD	Units to refund	Total refundable amount USD
Laptop		1	20.00	1	20.00
Tax					1.9
Shipping refund					20.47
Custom Fee					0.60

9. To view the refund details anytime in future, click on 'View' on the 'Refund Order' page.

The screenshot shows the "Refund Orders" list in the Shopify admin. The table has the following columns: Refund Date, Order Date, Order ID, Customer, Payment Status, Refund Cost, and Action. The first row is highlighted, and the "View" button is visible in the Action column.

Refund Date	Order Date	Order ID	Customer	Payment Status	Refund Cost	Action
Mon, 25 Sep 2023	Mon, 25 Sep 2023	1098	Jhon Smith	Refunded	USD42.37	View

10. Another confirmation can be viewed in the Shopify order details, in the Notes section towards top right. A note for the refund transaction appears here. (Note: There is no need to click 'Mark as paid' button.)

The screenshot shows a Shopify order for a 'Laptop' priced at \$20.00. A note indicates it was 'Restocked at Shop location'. A 'Refunded' status is shown with a green icon. The original order was from September 25, 2023, for a total of \$42.37. The refund details are as follows:

Original order	September 25, 2023	\$42.37
Subtotal	0 items	\$0.00
Shipping	Standard (0.0 kg)	\$20.47
Total		\$0.00
Paid by customer		\$42.37
Refunded	Reason: —	-\$42.37
Net payment		\$0.00

Transaction details for the refund:

- ValorPos payment refunded for USD 42.37 and Custom Fee USD 0.60.
- Transaction ID: [redacted]
- Approval Code: [redacted]
- RRN: [redacted]

Customer information:

- Customer:** Jhon Smith (2 orders)
- Contact information:** jhonsmith@valorpaytech.com
- Shipping address:** Jhon Smith, 2nd Avenue, California CA 90001

Buttons: 'Send invoice' and 'Mark as paid'.

Click **Transactions** in the left menu. You should see the most recent order on top.

The screenshot shows the 'VALOR ECOMMERCE' Transactions page. It displays a list of 'CREDIT SALE' transactions for 'Store: Valor Store' and 'Device: Device1'. Each transaction includes a date, amount, state tax, and a total amount. The transactions are as follows:

Transaction ID	Date	Amount	State Tax	Total
XXXX 1111	10-10-2023 08:09 AM (EST)	\$40.42	\$1.45	\$42.47
XXXX 1111	10-10-2023 08:08 AM (EST)	\$40.42	\$1.45	\$42.47
XXXX 1111	10-10-2023 08:06 AM (EST)	\$40.42	\$0.60	\$41.02
XXXX 8888	10-10-2023 08:04 AM (EST)	\$40.42	\$1.45	\$42.47
XXXX 8888	10-10-2023 07:57 AM (EST)	\$40.42	\$0.60	\$41.02

Each transaction entry includes a 'CREDIT SALE' icon, a 'VISA' logo, and a 'TSYS' logo. The total amount for each transaction is displayed in a black box on the right side of the entry.

You can also click on **View Receipt** again to confirm that the sale is now completed. Use the print icon on top to take a print of the receipt.

11	10-10-2023 08:09 AM (EST)	Amount: \$40.42	State Tax: \$1.45
ence:\$0.60			
Store:Valor Store	Device:Device1	EPI:2313185814	
11	10-10-2023 08:08 AM (EST)	Amount: \$40.42	State Tax: \$1.45
ence:\$0.60			
Store:Valor Store	Device:Device1	EPI:2313185814	
11	10-10-2023 08:06 AM (EST)	Amount: \$40.42	Card Difference:\$0.60
Store:Valor Store	Device:Device1	EPI:2313185814	
88	10-10-2023 08:04 AM (EST)	Amount: \$40.42	State Tax: \$1.45
ence:\$0.60			
Store:Valor Store	Device:Device1	EPI:2313185814	
88	10-10-2023 07:57 AM (EST)	Amount: \$40.42	(548) 796-3526
h@valorpaytech.com	Card Difference:\$0.60	Jhon Smith	

ADEL IA 5000s
967-719-3050

Valor Store

✓ **\$42.47**

APPROVED

SALE

Amount	\$40.42
State Tax	\$1.45
Card Difference	\$0.60

CHARGED
Visa 1111 - ONLINE

Total:	\$42.47
---------------	----------------

328312500959
TAS988 (APPROVAL TAS988)

Cardholder acknowledges receipt of goods and obligations set forth by the cardholder's agreement with issuer.

Thank You
CUSTOMER

T H A N K Y O U

2 Jericho Plaza, Suite 304,
Jericho, NY 11753, United States

valorpaytech.com



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1.800.615.8755

sales@valorpaytech.com