



Shift4 Plugin for Magento 2.3.x and 2.4.x

Thank you for using the Shift4 Plugin for Magento, a payment method that leverages proprietary Shift4 technologies. i4Go®, Lighthouse Transaction Manager, and the Universal Transaction Gateway® (UTG®) give you the security and PCI scope-reduction benefits of a tokenization solution while maintaining all the benefits of keeping the checkout process on your website.

Using the Shift4 Plugin for Magento provides a number of useful features, including:

- Provides customizable setup options.
- Supports credit cards, gift cards, and saved cards.
- Our gift card features provide flexible options, like the ability to disable the expiration date or card security code.
- Supports both book-and-ship and immediate charge business models.
- Supports partial authorization, which enables the merchant to use multiple cards to pay for a single transaction. For example, a gift card might have \$50 left on the card and the purchase total is \$85. A partial authorization is issued for the \$50 on the gift card and the customer is prompted to provide an additional form of payment for the remaining \$35.
- Supports split shipment using a single payment card.
- The address validation option provides an additional layer of security.
- The “Only allow encrypted MSRs” option offers additional protection for card present and call center type environments.
- Provides the ability for customers to save cardholder information. This provides a time-saving feature for users, and since all cardholder data is tokenized and no actual cardholder data is in the merchant’s system, the customer’s information is safe. You can also add, delete, or edit saved cards.
- Provides transaction reporting both in Magento and in Lighthouse Transaction Manager for end-of-day totals comparison.
- Uses i4Go, which captures cardholder data before it enters the merchant’s system, encrypts the data, sends it to Shift4’s data centers, and returns a Shift4 payment token to process the transaction. No cardholder data is stored, processed, or transmitted within the merchant’s environment. i4Go reduces PCI scope, since there is no actual cardholder data in the merchant’s system.
- Provides a built-in test environment and easy switching to the live environment.
- API credential verification adds another layer of security using an Access Token.
- The optional ability to log communications with Lighthouse Transaction Manager provides help in troubleshooting any problem that may arise.
- All transactions go into Lighthouse Transaction Manager, providing a full set of pre- and post-settlement auditing features.
- Lighthouse Transaction Manager offers two-factor authentication, providing an additional layer of security.
- Provides the ability to issue refunds and partial refunds within the Magento environment.

- Provides the ability for administrators to perform sales, including partial authorizations, allowing merchants to perform mail order or telephone orders (MO/TO) in Magento.



Note: If you have questions about features not listed above, contact the Shift4 Customer Support team.



Important: Some themes for Magento may prevent the function of certain features, even though the features are supported by the Shift4 Plugin for Magento. For example, partial authorization may not work if the theme does not provide the additional prompts needed to support the feature.



Note: The Shift4 Plugin for Magento is compatible with Magento's REST API for reporting.

Requirements for Using the Shift4 Plugin for Magento



Note: For Magento-based system requirements, visit devdocs.magento.com/guides/v2.4/install-gde/system-requirements.html.

- A working installation of Magento v2.3 or higher with secure (https) checkout enabled.
- A Magento account with store administration access privileges.
- To process live transactions, a Lighthouse Transaction Manager account with Account Administrator privileges is required. However, this is not required for Demo mode.



WARNING! Changing the Shift4 Plugin code will void the certification. Shift4 cannot be held responsible and is not liable for any cost or lack of productivity incurred should unauthorized changes be made.



WARNING! Receipts generated by the Shift4 Plugin for Magento module are coded to be compliant with card brand-recommended standards, including EMV-required content and formatting standards. However, changes to Magento core code or third-party receipt plugins may override Shift4's receipt settings and thereby render the formatting non-compliant with the aforementioned standards. However, the content will still be compliant.

Implementation Steps

The basic steps for implementing the Shift4 Plugin for Magento include:

- Downloading and installing the Shift4 payment method.
- Configuring the Shift4 payment method.
- Testing your configuration.



Note: This document assumes you have a working knowledge of Magento.

Downloading the File Package

To download and extract the ZIP file, complete the following steps:

1. Download <https://www.shift4.com/downloads/Magento-Shift4-v1.2.3.zip> and save the file.
2. Create a backup of the Magento files. We suggest creating a backup of the entire Magento folder by doing a full copy and paste to a different folder location and name (e.g., C:\Magento Backup).



WARNING! Make sure a backup of the Magento files has been created before you proceed. The installation of the magento2_s4pm payment method will add files to the existing Magento files. The rest of the Magento files and folders will remain in their current state and location.

Installing the Shift4 Payment Method

To install the Shift4 module into Magento, complete the following steps:

1. On **[root directory]**, create new directory structure:
 - Inside **app** folder, add **code** folder.
 - Inside **code** folder, add **Shift4** folder.
 - Inside **Shift4** folder, add **Payment** folder. Your new directory structure should be **[root directory] > app > code > Shift4 > Payment**.
2. Extract **magento-shift4-vx.x.x.zip** plugin into **Payment** folder. Inside the **Payment** folder, a new **magento-shift4-vx.x.x** folder is created; move all of its contents to the **Payment** folder.
 - Your final directory structure should be **[root directory] > app > code > Shift4 > Payment > all contents plus magento-shift4-vx.x.x** (empty folder).
3. To upgrade the module using Command Prompt, complete the following steps:
 - On terminal, enter **sudo php bin/magento setup:upgrade** from magento web root directory. (For Linux, the common web root directory for Ubuntu OS is **var/www/html/magento**; however, it may be different depending on other Linux OS.)
 - Press **Enter** to execute the command.

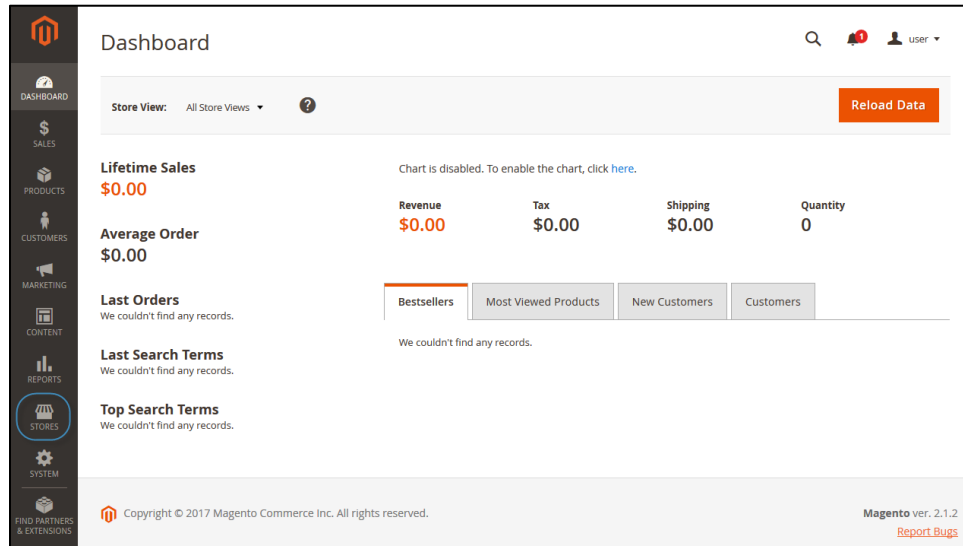


Tip: For additional information, see the Magento [documentation](#).

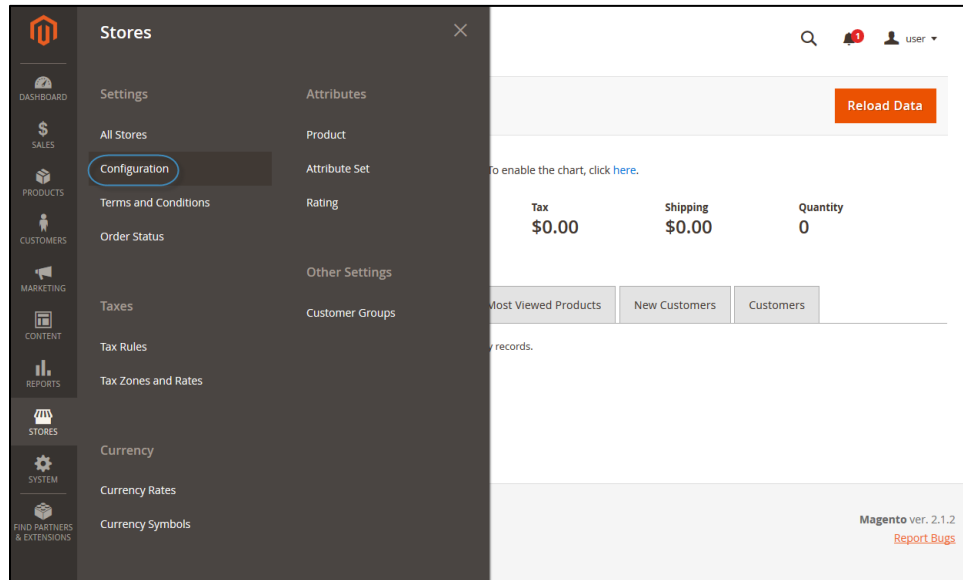
Configuring the Shift4 Payment Method

To configure the Shift4 payment method, complete the following steps:

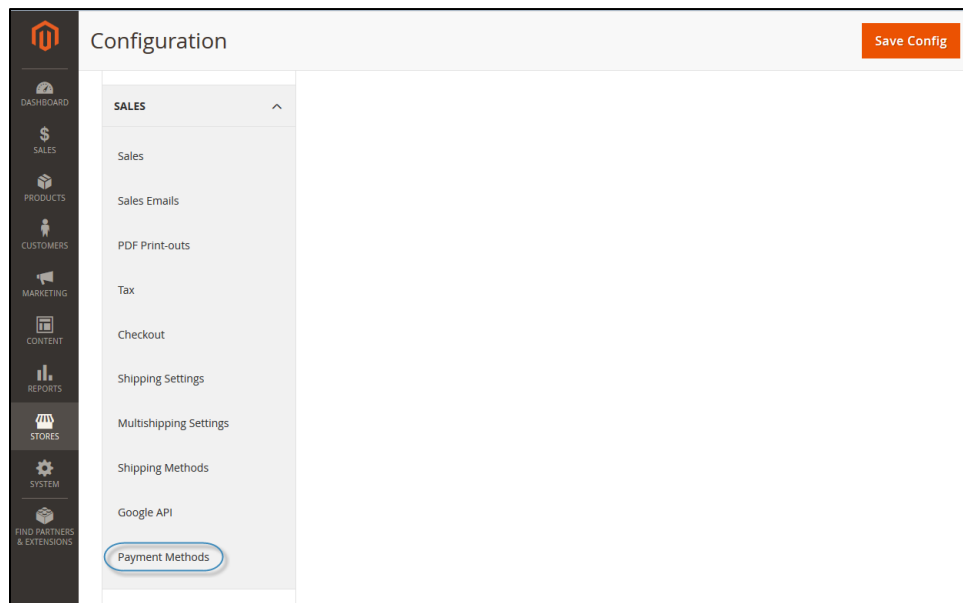
1. Log in to Magento as the administrator.
2. From the Magento Admin panel menu, click  (STORES).



3. From the STORES menu, click **Configuration**.



4. On the **Configuration** page, scroll down to Sales and click **Payment Methods**.

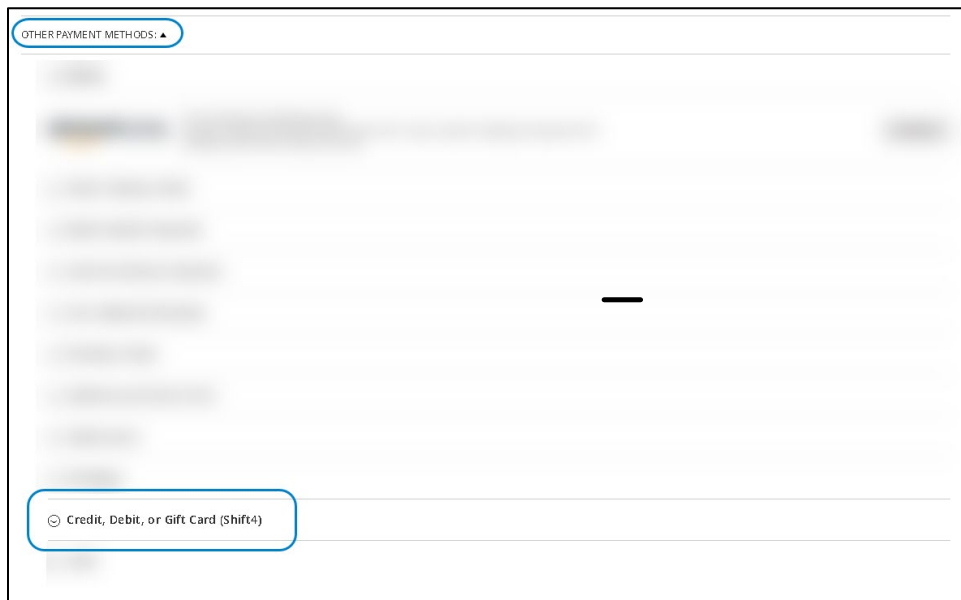


5. In the Merchant Location section, select the desired option in the Merchant Country drop-down list.



Tip: For information about each field, click  next to the field.

6. Scroll down to the OTHER PAYMENT METHODS section, and then click on **Credit, Debit, or Gift Card (Shift4)**.



7. To configure, complete the following steps:

- In the Enabled drop-down list, select **Yes**.



Note: The Shift4 option will not be displayed at checkout unless Enabled is set to **Yes**.

- In the Title field, enter a new title or leave the default. (If Yes is selected in the Enabled field, the text in the Title field will be displayed to your customers to denote the payment option.)
- In the Payment Submit Label field, you can change the text displayed on the button used when a customer is ready to submit their payment. The default is “Place Order.”
- In the Processing Mode drop-down list, select the desired option:
 - For testing, select **Demo**.



Note: If you select **Demo** and want to simulate test transactions, use the documentation for [Test Card Numbers](#) and [Test Server Trigger Values](#).

- If you are ready to process real transactions, select **Live**.



Note: If you select **Live**, all fields on this page must be configured in order to process real transactions, which will be available in Lighthouse Transaction Manager.

- *(If applicable)* If you selected Live, in the Server Addresses field, complete one of the following steps:
 - If you are using a local UTG, enter the list of UTG IP addresses and port numbers, separated by commas.
 - If you are not using a UTG, leave the pre-populated address. The default address is <https://utg.shift4api.net/api/rest/v1>.



Requirement: Setting up a UTG for Magento will require an HTTP SSL interface.



Important: If you're using a local UTG, it is important to note that starting with UTG version 3130, all new UTG releases will have Offline Mode enabled by default (offering a seamless transition between offline and online processing). For additional information, see the *Configuring Offline Mode* section in the [UTG Installation and Configuration Guide](#).

- (If applicable) If you selected Live, in the Auth Token field, paste or enter the Auth Token generated in Lighthouse Transaction Manager and click **Exchange**. This will exchange the Auth Token for an Access Token, which will be displayed masked and allow you to process transactions through Lighthouse Transaction Manager.



Note: For additional information on generating an Auth Token, see *Appendix B – API Settings* in the [Account Administrator Guide](#).

- (If applicable) If you selected Demo, you have the option to enable or disable SSL. This is for Demo (testing) mode only. SSL is required for Live mode.
- In the Enable Logging drop-down list, select the desired option:
 - If you do not want to log any communications with Lighthouse Transaction Manager, select **Off**.
 - If you want to log only the problem communications with Lighthouse Transaction Manager, select **Log Problems Only**.
 - If you want to log all communications with Lighthouse Transaction Manager, select **Log All Communications**.



Note: Log files are generally located within your root Magento installation in `{{base_dir}}/var/log`. It is recommended that you select **Log All Communications**, as logs are valuable in troubleshooting problems.



Requirement: Logging must be enabled on the Developer page for the selected option to take effect. However, this does not apply if Off is selected.

- *(If applicable)* If **Yes** is selected in the Developer mode drop-down list, then additional logging will be supplied during the Shift4 payment process.
- In the Send HTML invoice drop-down list, select the desired invoice type that will be sent to Lighthouse Transaction Manager. The options include the following:
 - **Full Invoice**
 - **Simple Invoice**
 - **Magento order number only**
 - **No notes**
- In the Allow Partial Authorization drop-down list, select the desired option:
 - If you would like to allow a partial authorization on a payment card, select **Yes**. This will automatically prompt for a different, additional payment card when an approval for a lesser amount is obtained on the submitted payment card.
 - If you do not want to allow a partial authorization on a payment card, select **No**. If No is selected, an authorization for a lesser amount will be voided and a new payment card will be required.



Important: Partial authorization as described above is only available when shipping to a single address. Also, while Shift4's payment method supports partial authorizations, some third-party one-page checkout extensions do not. If you are using this type of extension and support for partial authorizations is desired, you will need to verify that it works with the Shift4 payment method.

- In the Transaction Mode drop-down list, select the desired option:
 - If you want to authorize and finalize transactions at the same time, select **Immediate Charge**.
 - If you want to authorize transactions and manually finalize the transactions at a later time, select **Book and Ship**.



Requirement: If you select **Book and Ship**, you must Submit Invoice before you Submit Shipment.

- In the Only Support Encrypted MSRs drop-down list, select the desired option:
 - If Shift4 is enabled as a payment option and you would like to only support encrypted magnetic swipe readers (MSRs), select **Yes**. This will only allow encrypted MSRs to be used when swiping cardholder data.
 - If you want to support unencrypted and encrypted MSRs, select **No**.
- *(If applicable)* In the Support HSA/FSA drop-down list, select the desired option.
 - If Shift4 is enabled as a payment option and you would like to support HSA/FSA, select **Yes**. This will allow you to add a desired attribute to an item. Before you can add an attribute to an item, you will need to create a new custom attribute set called "ias_type" that will be a drop-down list with the attributes listed below. Then, add an IAS type to each product you would like HSA/FSA to be considered on. They include the following:
 - 4S-Healthcare
 - 4T-Transit
 - 4O-Cash Disbursement
 - 4U-RX
 - 4V-Vision
 - 4W-Clinical
 - 4X-Dental
- In the Gift Card Disables Expiration Date drop-down list, select the desired option:
 - If Shift4 is enabled as a payment option and you would like to process gift cards without requiring the customer to enter the card's expiration date, select **Yes**.
 - If not, select **No** to require the customer to enter the expiration date when using a gift card.

- In the Gift Card Disables Card Security Code drop-down list, select the desired option:
 - If Shift4 is enabled as a payment option and you would like to process gift cards without requiring the customer to enter the card's security code (the three- or four-digit code on the front or back of the card) when using a gift card, select **Yes**.
 - If not, select **No** to require the customer to enter the card's security code (the three- or four-digit code on the front or back of the card) when using a gift card.
- In the Enable saved cards drop-down list, select the desired option:
 - If you would like your customers to be able to select their saved cardholder data during checkout, select **Yes**.
 - If you prefer your customers reenter their cardholder data during checkout, select **No**.



Note: All cardholder data is tokenized, so no real cardholder data is stored in your system.

- *(If applicable)* In the Enable Google pay drop-down list, select **Yes** to enable using Google Pay for transactions.
- *(If applicable)* In the Enable Apple pay drop-down list, select **Yes** to enable using Apple Pay for transactions.
- In the Sort Order field, enter the order in which you would like payment methods to appear during the checkout process. For example, if you enter 1, then during checkout customers will be presented with the Shift4 option first.

8. When you have completed making your selections, click **Save Config**.

Configuration

Scope: Default Config

Save Config

GENERAL

CATALOG

SECURITY

CUSTOMERS

Merchant Location

Merchant Country: United States
(website)
If not specified, Default Country from General Config will be used.

Credit, Debit, or Gift Card (Shift4)

PROCESSED AND SECURED BY SHIFT4

[Click here to learn more](#)

Enabled* (store view): Yes

Title* (store view): Credit, Debit, or Gift Card (Shift4)

Payment Submit Label* (store view): Place order

Processing Mode* (store view): Demo

Enable SSL* (store view): No

Enable Logging* (store view): Log All Communications

Developer mode* (store view): No

Send HTML invoice* (store view): Simple Invoice

Allow Partial Authorization* (store view): No

Transaction Mode* (store view): Book and Ship

Only Support Encrypted MSRs* (store view): No

Support HSA/FSA* (store view): Yes

Gift Card Disables Expiration Date* (store view): No

Gift Card Disables Card Security Code* (store view): No

Enable saved cards* (store view): Yes

Enable Google pay (store view): Yes

Enable Apple pay (store view): Yes

Sort Order* (website): 2



Tip: To restore the Server Addresses field to the default state, click **Reset**.
To replace your current Access Token, click **New Token** and follow the token exchange instructions above.