synchrony

Synchrony Shopify Setup Guide

HOW TO INTEGRATE SYNCHRONY
FINANCING ON YOUR SHOPIFY SITE

Introduction

The Synchrony App allows you to display Synchrony financing offers on all Product Display Pages, on the Cart page, and in checkout.

It also provides a Pay With Synchrony option in the shopping cart. Consumers who complete a new application and are approved will select this option to use their new account. The offer is continuously available while they are in the same browser session and they will not be required to enter their account number.

Consumers with an existing Synchrony Flex Credit Card can select Pay with Synchrony, complete an account number lookup process, and use their account.

Use your Shopify console to process the payment as part of your normal order flow. For orders on the Synchrony Flex Card, shipping the product will capture the order payment details, and initiate funding for the order. Funding is completed within two business days once the order is shipped. For orders placed using Pay In 4, payment is captured when the customer agrees to the loan. This begins the funding process. Merchants will see funding within 2 business days. Order notes in your Shopify console will provide confirmation as to which type of payment was captured from the customer.

If you need to adjust an order made using Pay In 4 or Pay Later to a lower price, process a partial or full refund. The order amount on a Pay In 4 or Pay Later loan cannot be adjusted up. The customer will need to provide an alternate payment method if the order total is increased. Pay In 4 and Pay Monthly loans are installment loans and cannot be increased after the consumer accepts the loan.

Terms and Definitions

| Term	Definition
Merchant	Merchant enrolled with Synchrony to provide financing and payment options.
Merchant ID	A unique 16-digit identification number assigned to a merchant. Each financing product will have a different MID.
SYF Partner ID	A unique alphanumeric code assigned to the partner. All MIDS assigned to a merchant will have the same SYF Partner ID.
Activation Key	A onetime use only key provided to enable the Synchrony applications. If you uninstall the Synchrony applications, you will need a new Activation Key to proceed.
PDP	Product Display Page
Widget	An element of a graphical user interface that displays information or provides a specific way for a user to interact with the operating system (OS) or an application.
Authorization	The purchase was approved by Synchrony and the merchant can prepare the merchandise for shipping.
Captured	After the order is placed, approved by Synchrony Financing, and shipped, the order is considered captured. This begins the funding process, which allows the merchant to get paid.

Technical Support

For technical support related to the Synchrony application, send an email to:
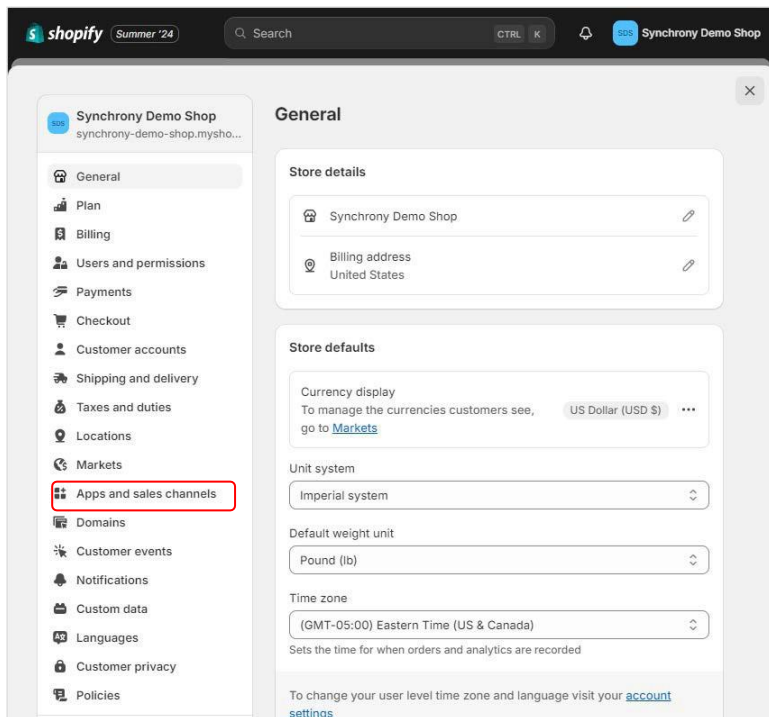**helpdesk@synchrony-ecommerce.zendesk.com**

Installation

To add the Synchrony App follow the steps below.

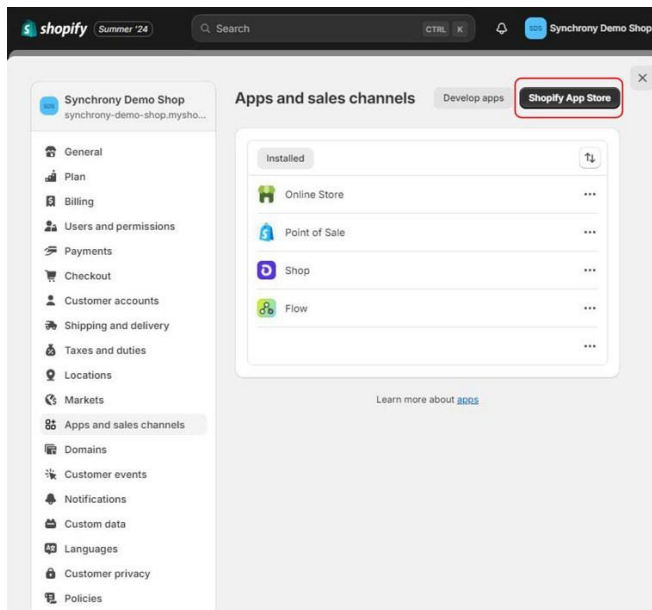- Log in to your Shopify Admin Console

- Click **Settings**
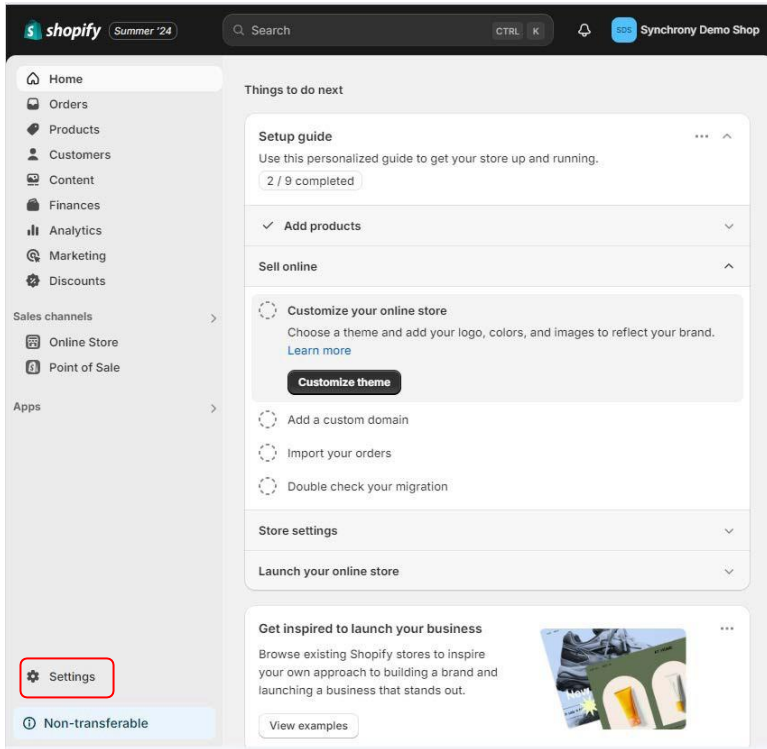
- Click **Apps and sales channels**

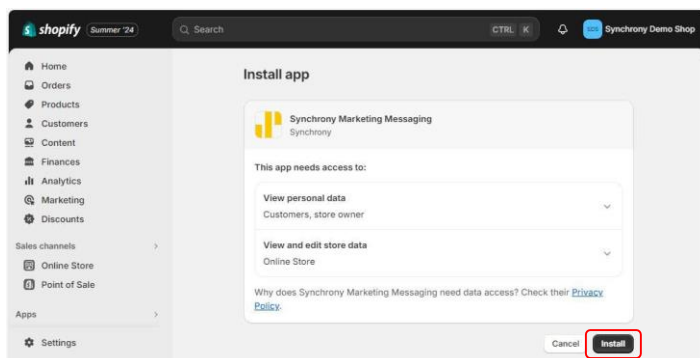## Installation (Cont'd)

- Click **Shopify App Store** or go to **https://apps.shopify.com/synchrony-marketing**

- Search **Synchrony**

- Click **Install**

The Install page will display in your Shopify Admin Console

- Click **Install** again, within your Shopify Admin Console

Configuration

You will have received an **Activation Key** that was sent by email to the principal business owner.

Without an Activation Key, your Synchrony eCommerce integration will not work.
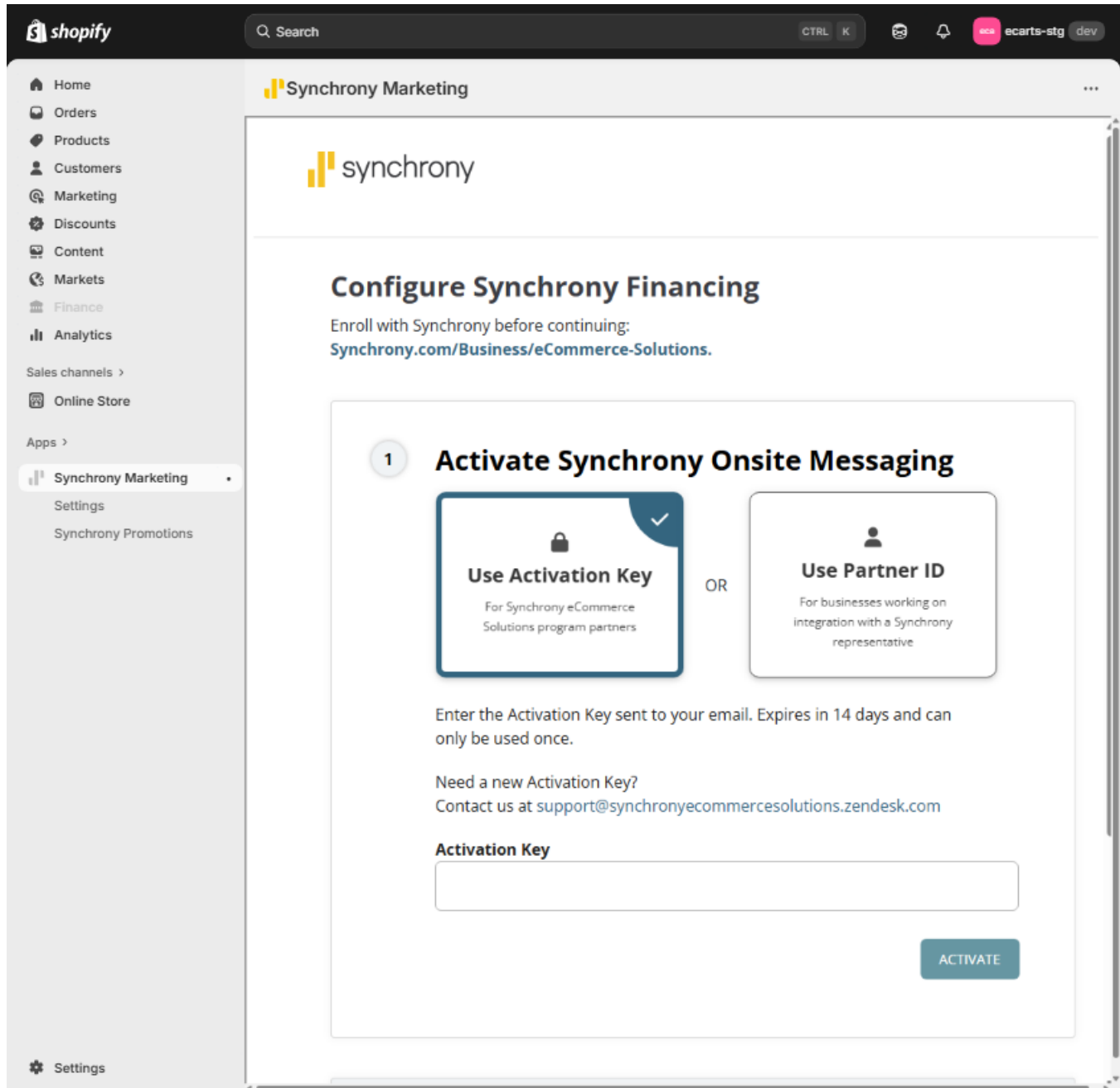
- **Activation Key: Enter Activation Key provided by email**
- Click **Activate**

Configuration (Cont'd)

To configure which pages you would like to display the Synchrony Promotional Financing On Site messaging:

For initial activation, the General settings will automatically appear. Synchrony recommends advertising on all the Product Display Pages and Shopping Cart.

If you are returning to the Admin panel, then click on settings under Synchrony menu, and select PDP and Shopping Cart if needed.
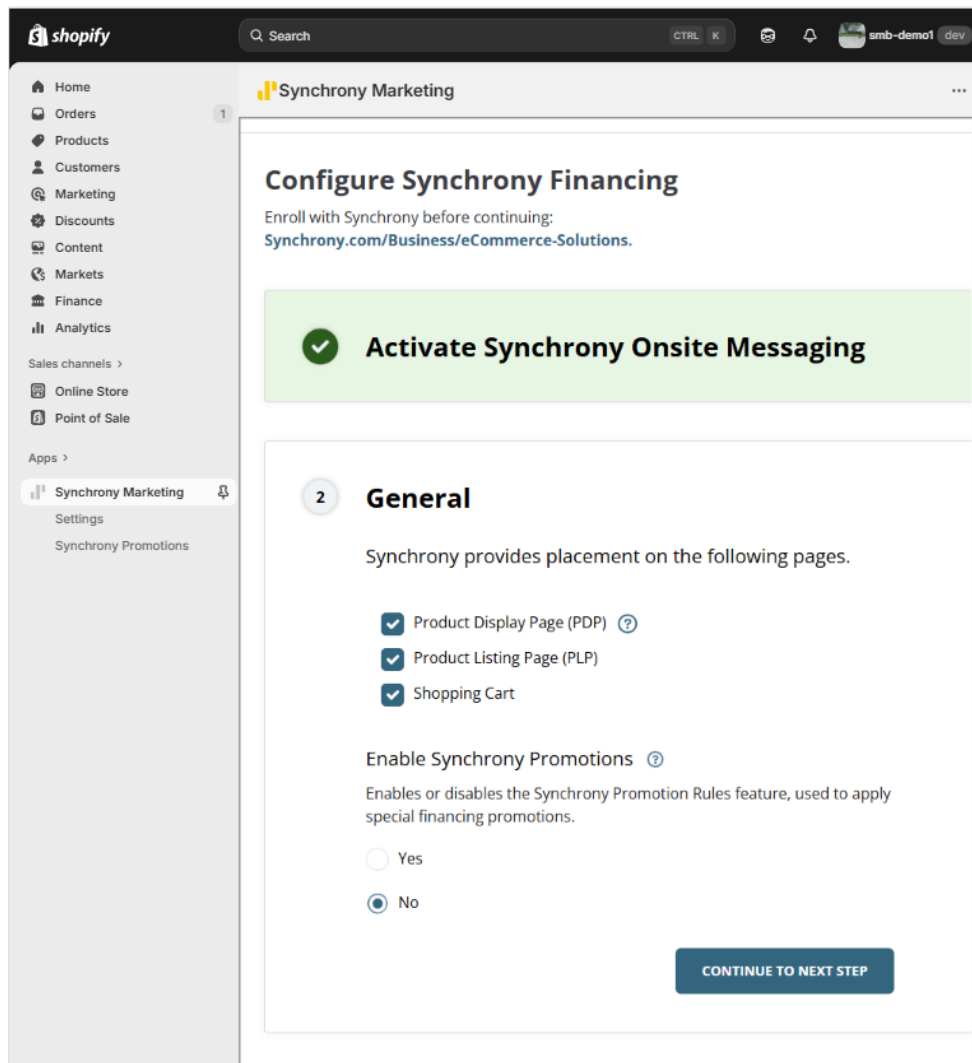
Displaying the Synchrony Financing On Site message in all locations will maximize conversion

Click **Continue To Next Step**

Pro Tip: Advertising your Synchrony financing program can set you apart from competitors by highlighting that customers can apply for financing to help budget their purchase with you. Synchrony offers free, compliant, downloadable digital marketing assets to help you promote Synchrony financing on your website and on social media. Learn more here.
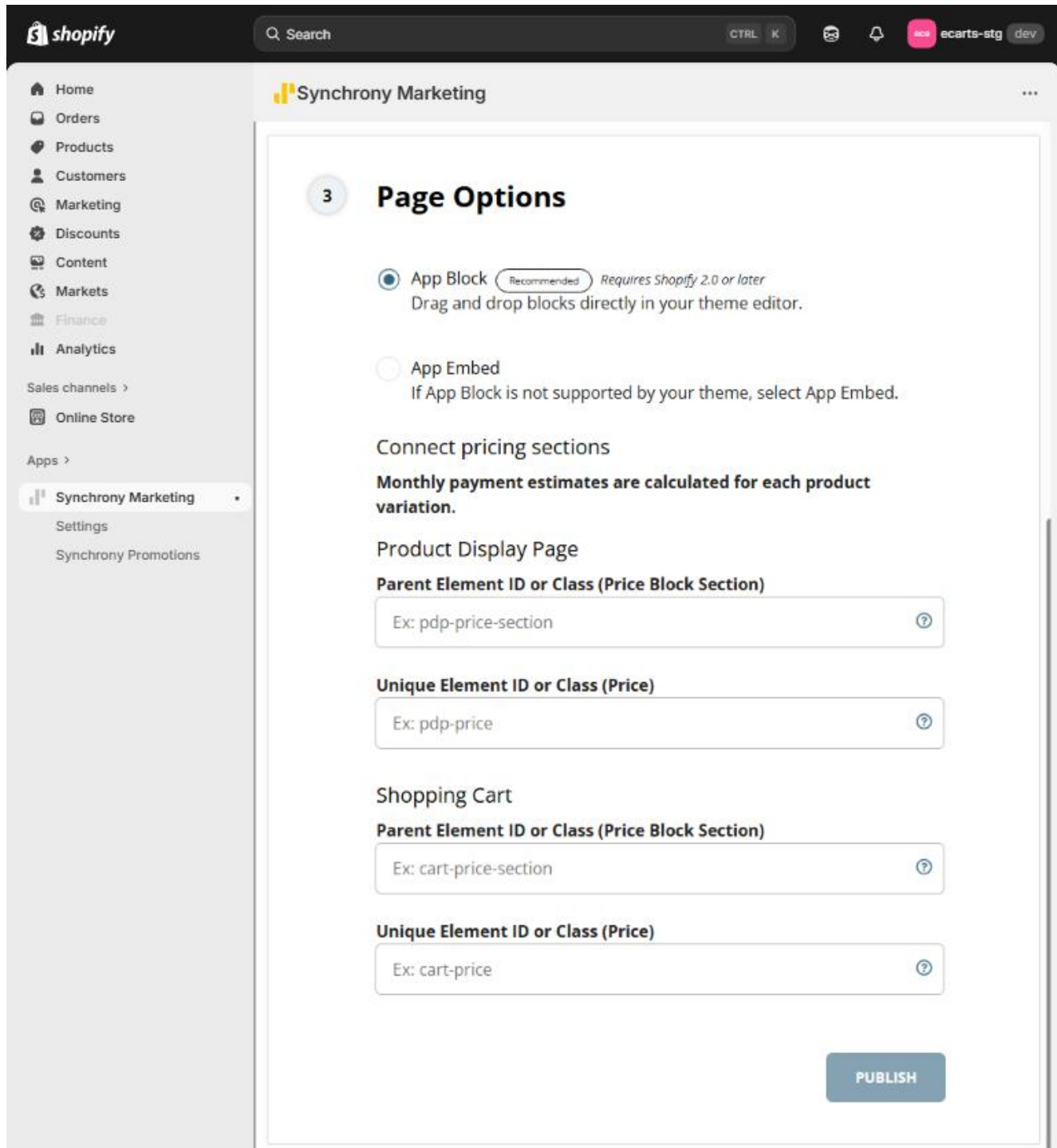
Enabling the Synchrony Widget

To enable the Synchrony App, there are two options:

- **(1)** If your Shopify Theme supports the use of App Blocks, please follow the steps in **Option 1** to enable via **App Block**

    - o App Block is recommended for Shopify 2.0 or later

- **(2)** If your Shopify Theme does not support the use of App Blocks or you are having trouble enabling with Option 1, please follow the steps in **Option 2** to enable the widget via **App Embeds**

Enabling the Synchrony Widget

ⓘ *Not sure which option to choose? Follow the instructions starting on page 8.*

- **(3)** Click **Publish**

Enabling the Synchrony Widget (Cont'd)

To verify if a theme supports app blocks or app embed blocks, navigate to the customization section of your theme on the admin screen: Sales Channels > Online Store >Themes > Customize.
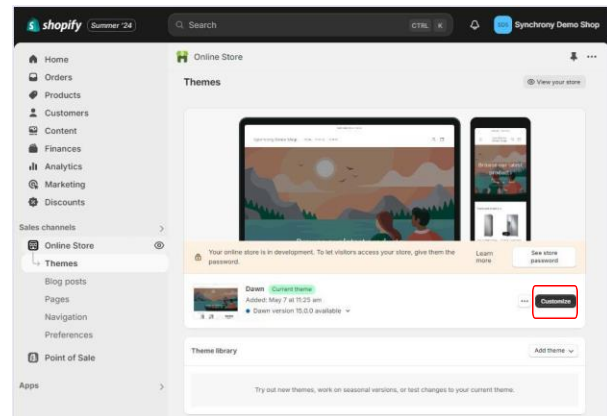
When you click Customize, a new web page will be displayed like the screen shot below. Under the Home page drop down menu, select Products and then Default product.
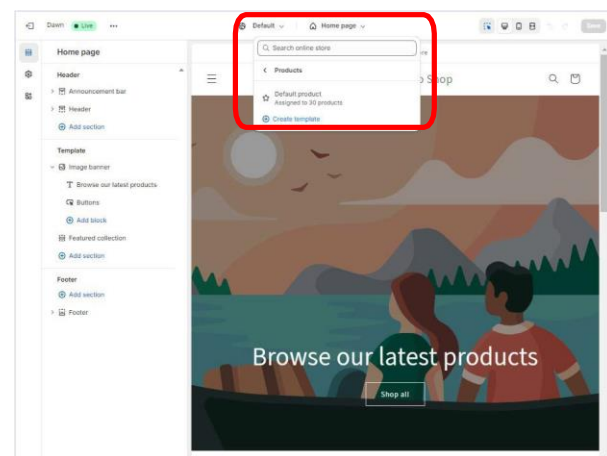
After navigating to the default product template page, look to see if there is an **Add block** option.
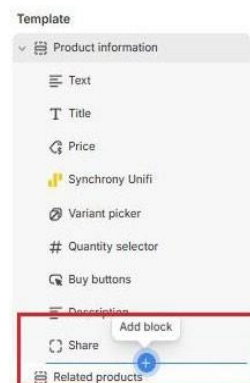
ⓘ *You may have to scroll over the bottom of your left container to see the + Add block text.*

- If you see an option to add a block, then your Shopify Theme supports App Blocks and you should use **Option 1**

- If you do not see this option, you should proceed with **Option 2**
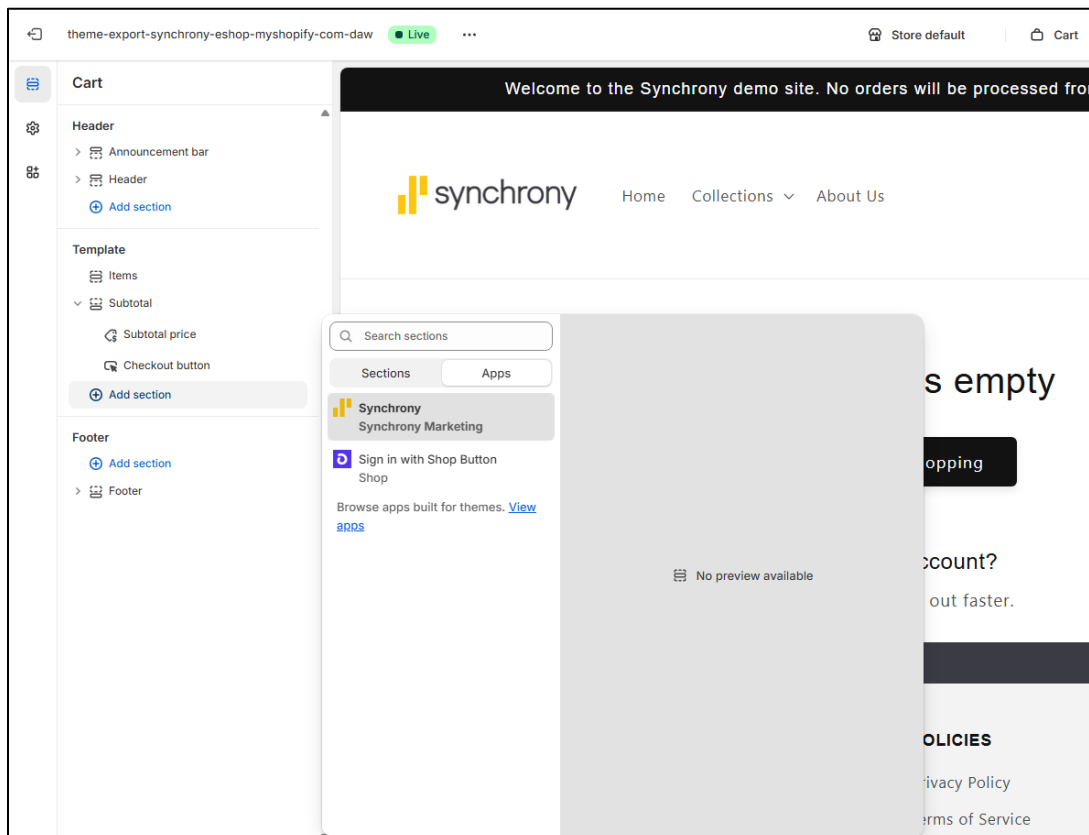
Enabling the Synchrony Widget - Option 1

To enable the Synchrony Widget using App blocks on your Product Detail pages, first navigate to your default product page.

- Click the blue **Add Section** option and select **Synchrony** under 'Apps'
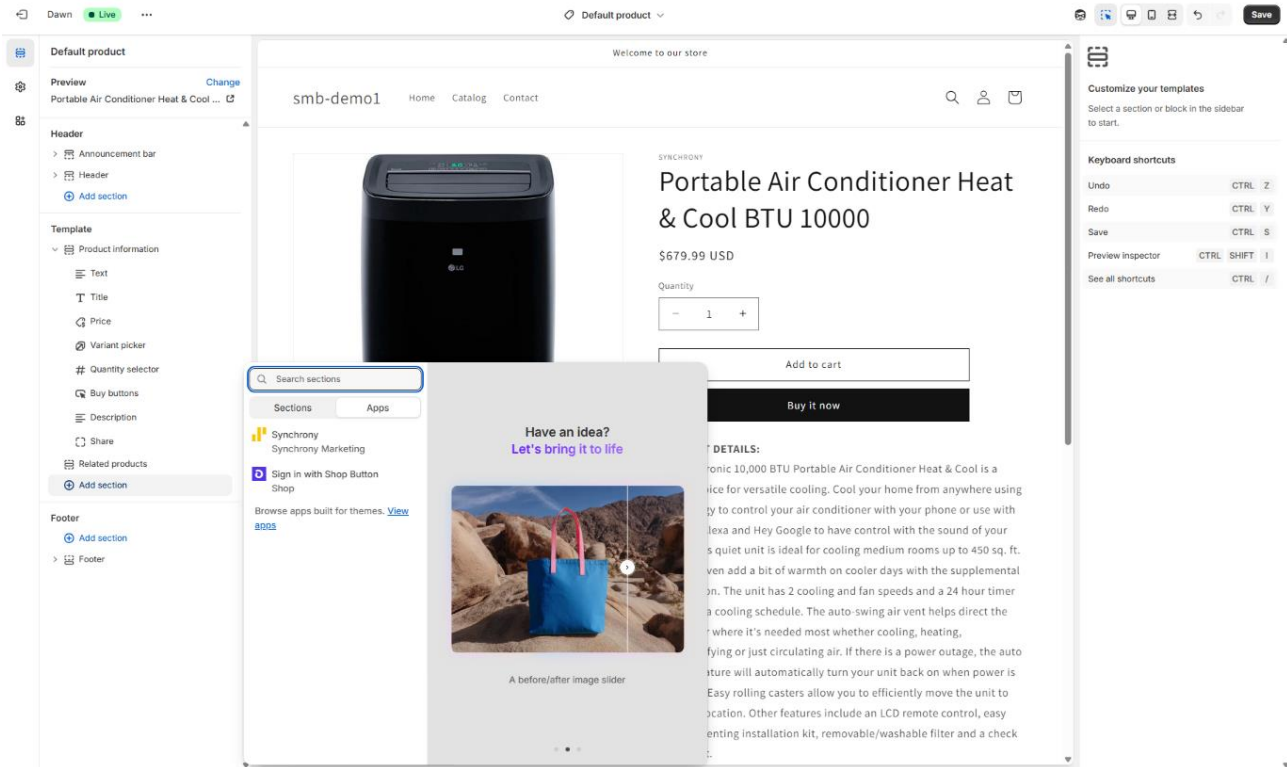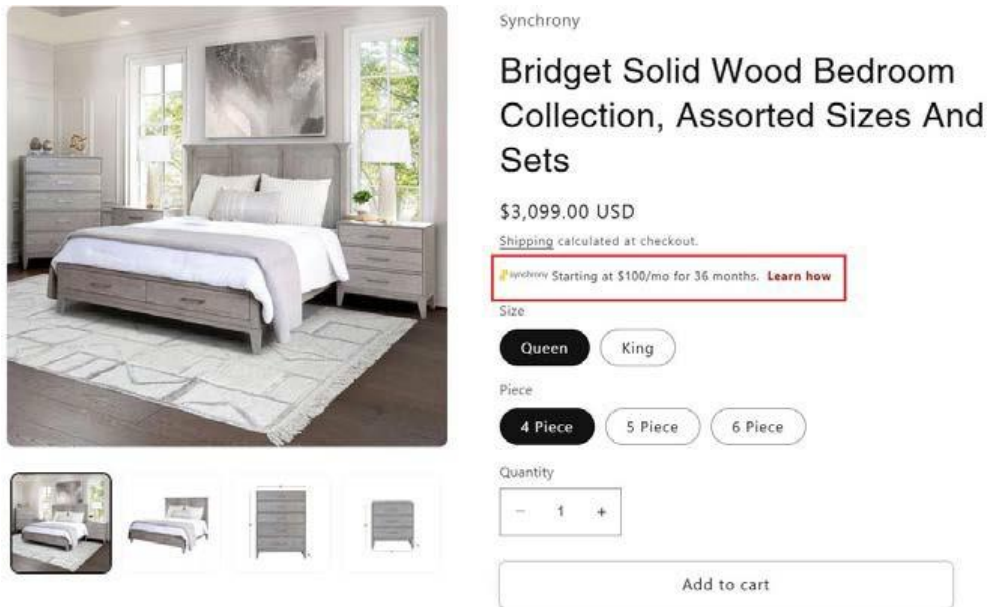
- Move the Synchrony block below the Price block using the reorder icon
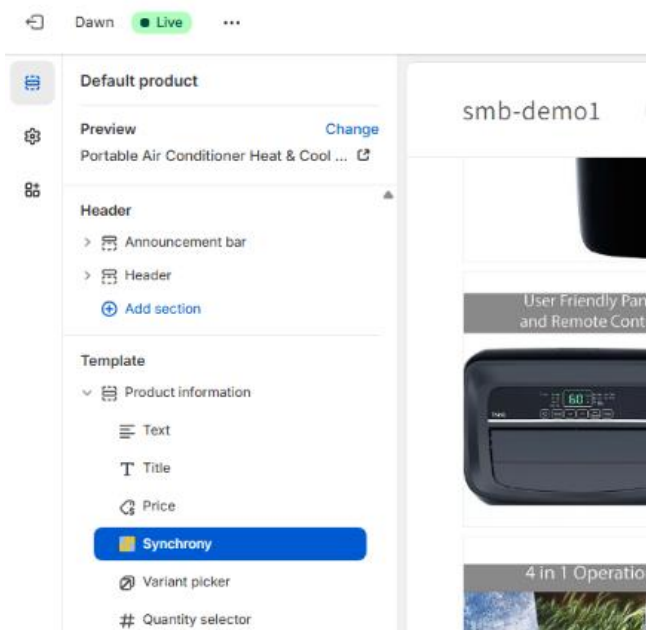
- Click **Save**

Enabling the Synchrony Widget - Option 1 (Cont'd)

If configured correctly, you will see the Synchrony Promotional Financing On Site messaging on the Product Detail Page.

Enabling the Synchrony Widget - Option 1 (Cont'd)

To enable the Synchrony Widget using App Blocks on your Cart page, first navigate to your Cart page within your Shopify Theme Editor.
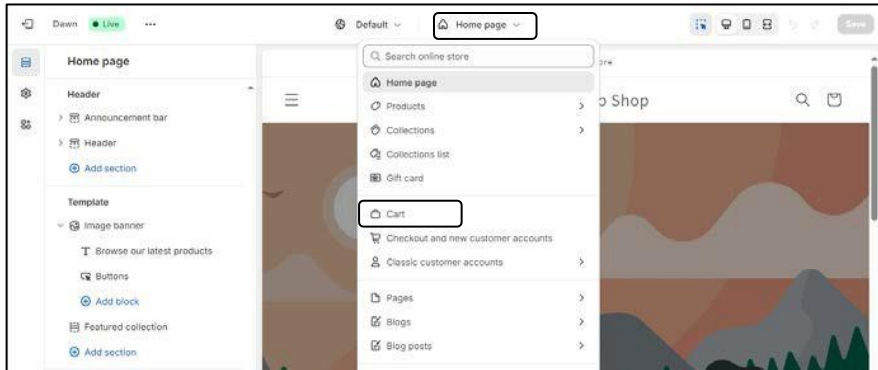
- In the left navigation, go to Template > Subtotal, click the blue **Add block** option and select **Synchrony** under 'Apps'

Enabling the Synchrony Widget - Option 1 (Cont'd)

- Move the Synchrony App under the Subtotal price
  - o Keeping it near the Checkout button is strongly recommended
- Click **Save**
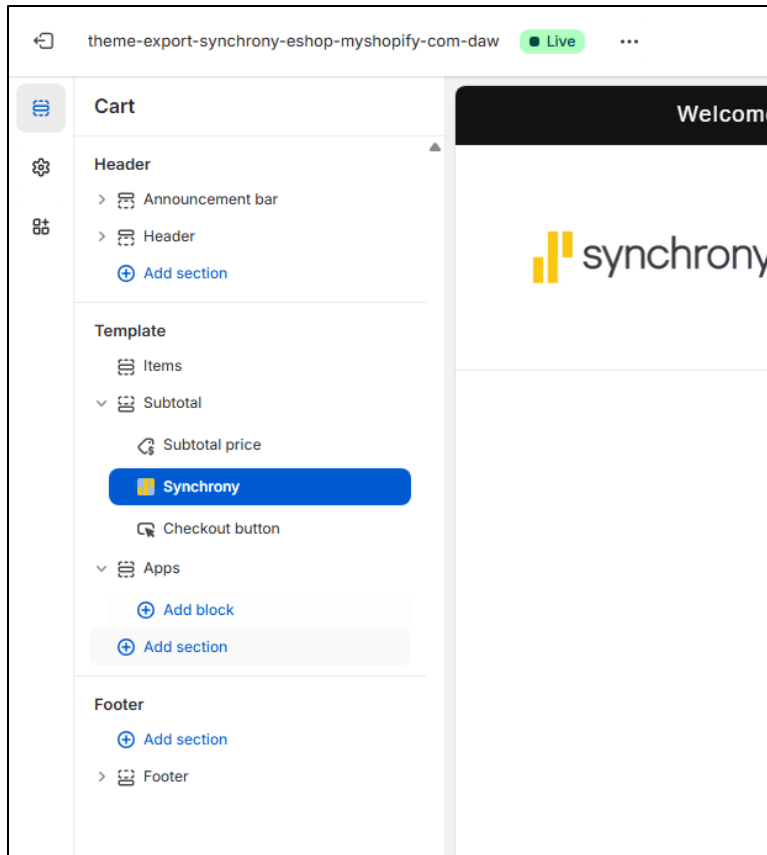
If configured correctly, you will see the Synchrony Financing Promotional messaging below the Check out button as shown below.

Enabling the Synchrony Widget - Option 1 (Cont'd)

PRODUCT	QUANTITY	TOTAL
Bridget Solid Wood Bedroom Collection, Assorted Sizes And Sets $3,099.00 Size: Queen Piece: 4 Piece	− 1 + 🗑	$3,099.00

Subtotal $3,099.00 USD

Taxes and shipping calculated at checkout

Check out

synchrony Starting at $100/mo for 36 months. **Learn how**

Enabling the Synchrony Widget - Option 2

If there is no option to add a block on your default product page, you will have to enable the app embed block.

- In your Theme Home, click on the **App Icon** found in the left panel
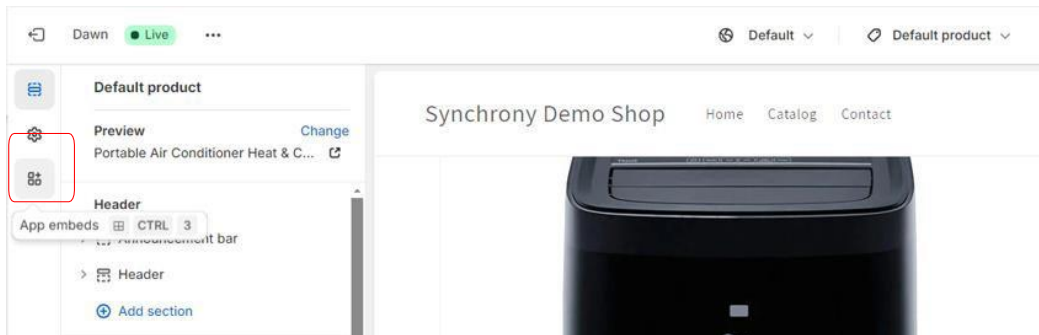
- Click on the slider next to the Synchrony listing to enable the Synchrony App
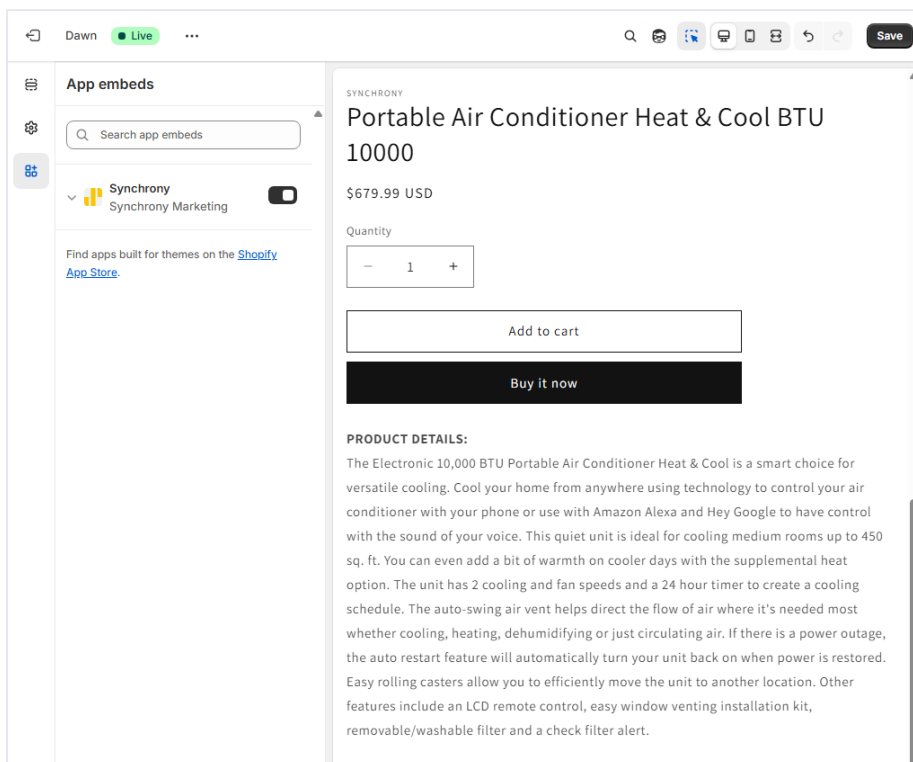
- Click **Save**

Enabling the Synchrony Widget - Option 2 (Cont'd)

To configure the Synchrony Promotional Financing message with App Embeds, navigate back to the Synchrony App configuration page.

- If needed, exit the Theme Editor by selecting the exit icon at the top left of the top navigation bar
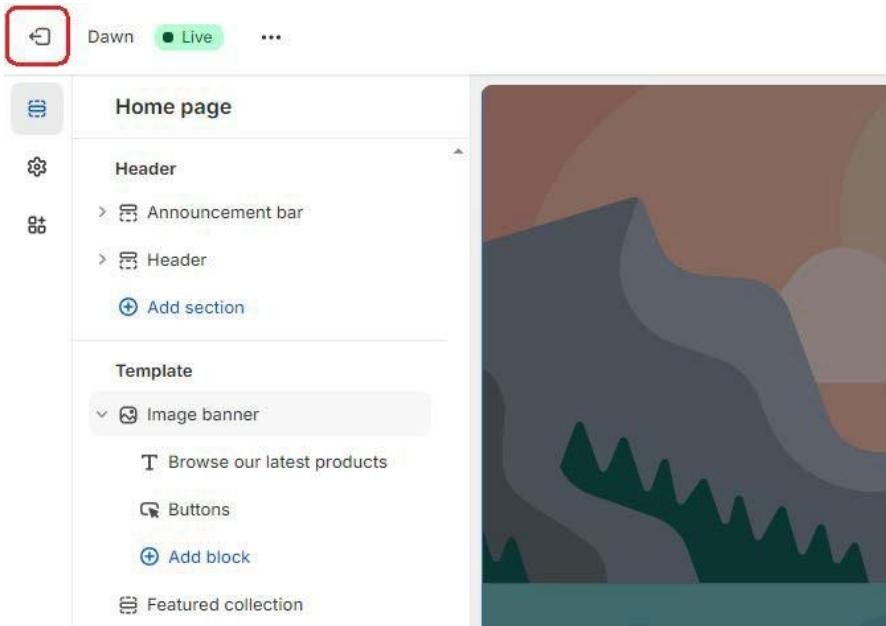
- Proceed to the Synchrony App Settings page by using the left-side navigation or Shopify search field (Left Navigation > Apps > Synchrony Marketing App)
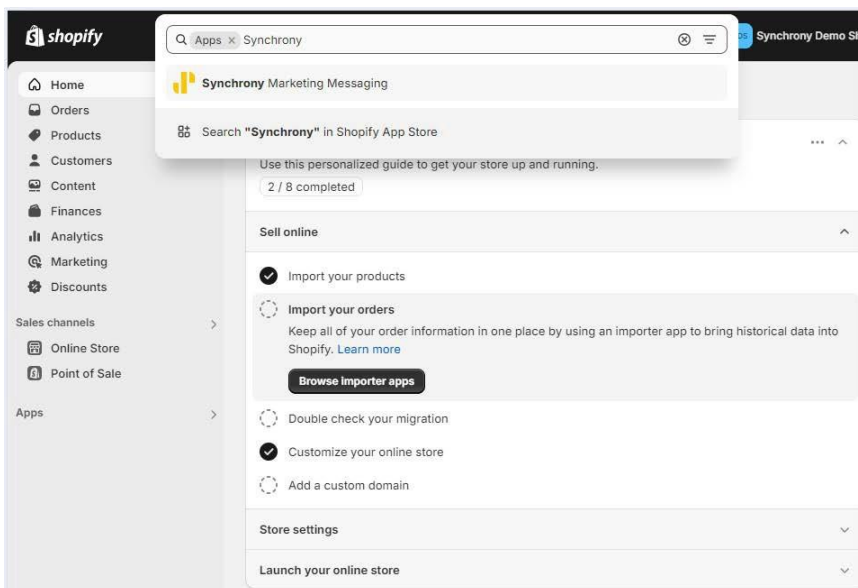
Enabling the Synchrony Widget - Option 2 (Cont'd)

To display the widget in the proper place on your Product Detail and Cart pages:

- **(1)** Click **Settings**

- **(2) Product Display Page**: Enter the Element ID or Class

- **(3) Shopping Cart**: Enter the Element ID or Class

- Click **Publish**

ⓘ *To find the correct HTML Element follow the instructions starting on page 19.*

Enabling the Synchrony Widget - Option 2 (Cont'd)

Note: Examples shown were taken in Google Chrome. Steps may vary by browser.

- Navigate to the PDP or Cart page

- Right-click the page and select the 'Inspect' option
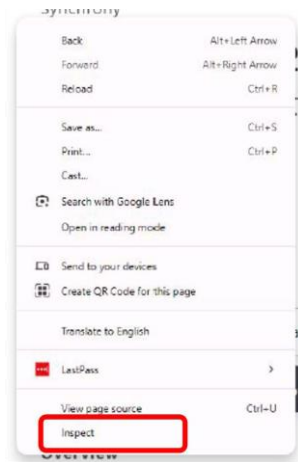
- Use the Element Inspector Tool to highlight and pick the section on the page you want the Synchrony Promotional Financing Message to display

- Hover over the price section of the page. It will highlight in blue. This will take your console directly to the corresponding element in the code
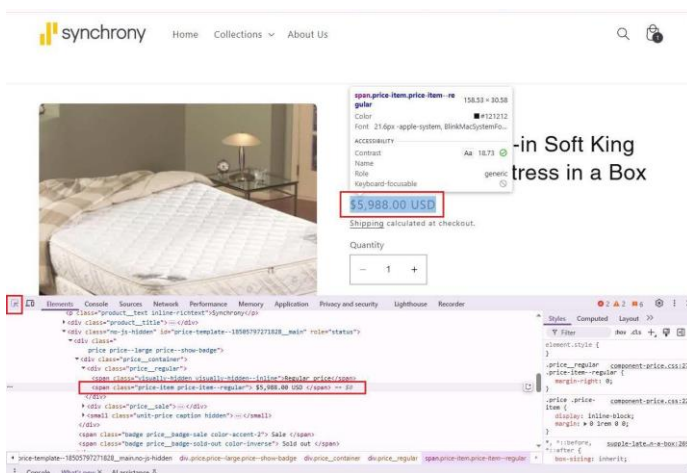
- Double click on the class ID or element ID and copy that text
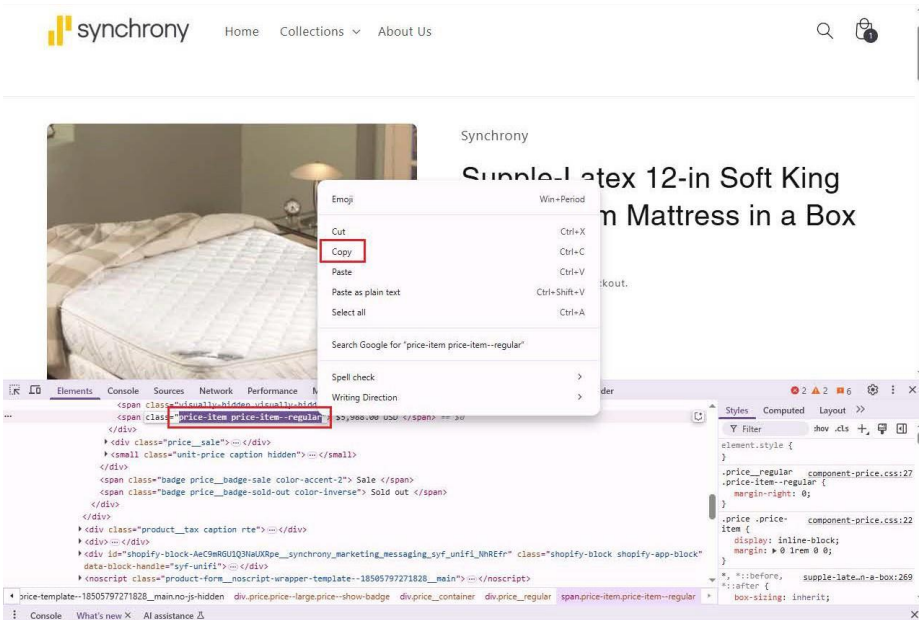
- Paste the selected HTML Element ID into the respective field in the Synchrony App

Note: These Element IDs will be slightly different in different themes. Below are a few examples:
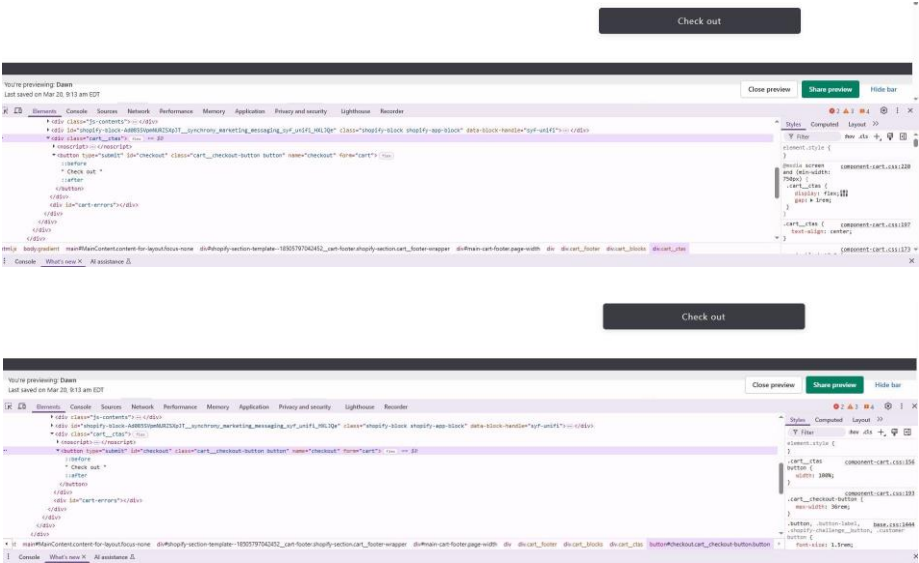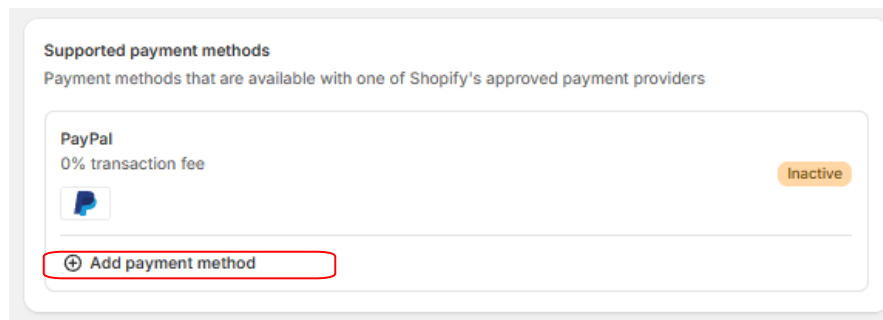
Integrating the Synchrony Payment Gateway Application

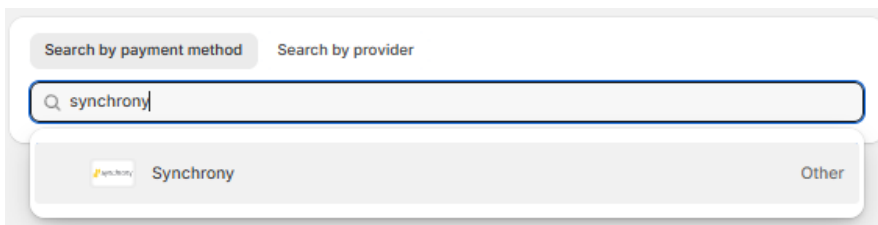To integrate the Synchrony Payment Gateway Application, follow the steps below:

- Log in to your Shopify Admin console
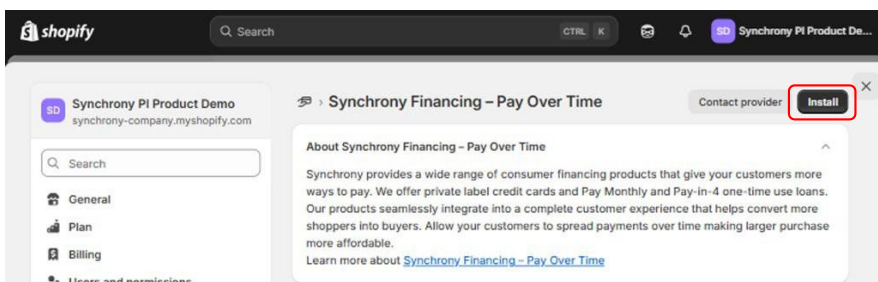
- Go to the Shopify Admin Dashboard > Payments section
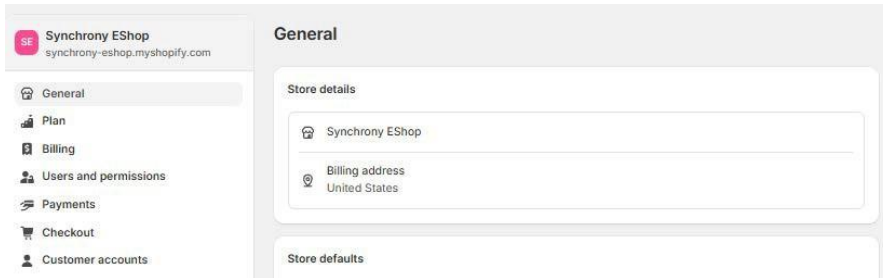
- Click **Add payment method**

- Type 'Synchrony' in the search bar and select the Synchrony option

- Click **Install**

Integrating the Synchrony Payment Gateway Application (Cont'd)

The Install page will display in your Shopify Admin Console.
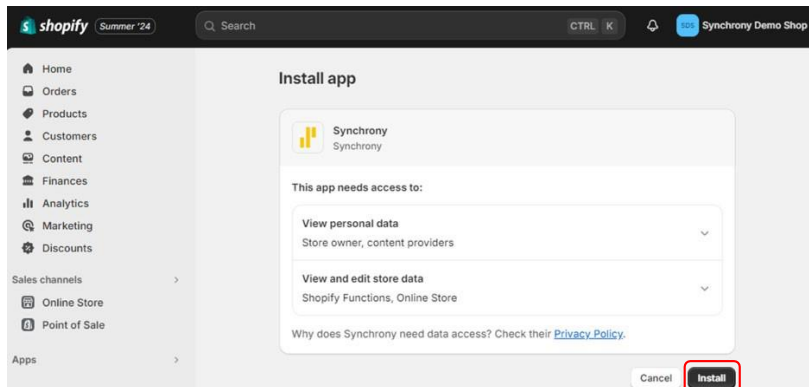
- Click **Install** again, within your Shopify Admin Console

Configuration Page:

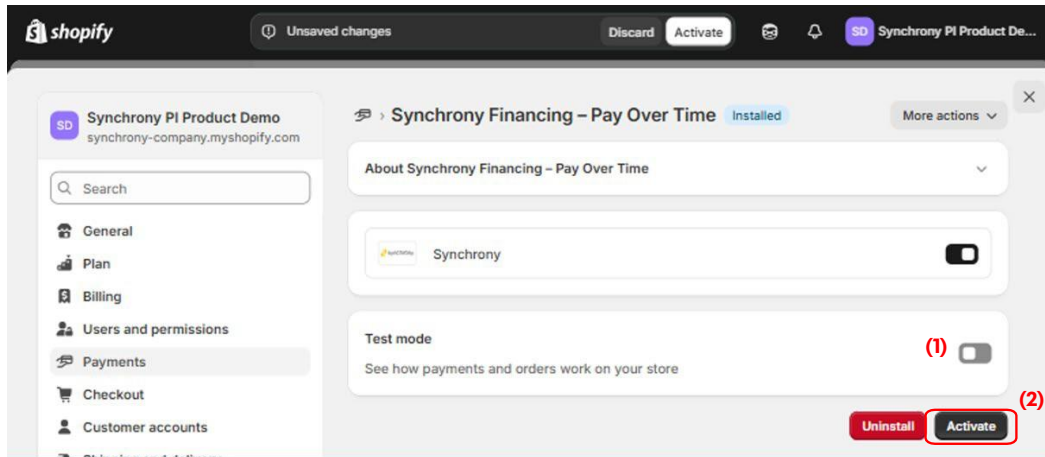# Integrating the Synchrony Payment Gateway Application (Cont'd)

- **Gateway Settings**:
    - o **(1) Address Used for Payment Processing:** Billing Address is recommended
    - o **(2) Custom Checkout Page**: Select **Yes**
    - o **(3) Allow Ship to Store**: Select **No**

- **(4)** Click **Publish**

Integrating the Synchrony Payment Gateway Application (Cont'd)
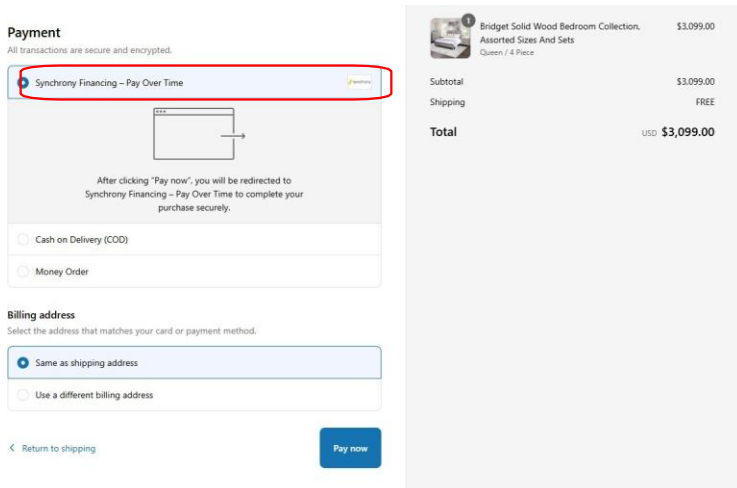
- To confirm set up - *toggle off* **Test mode (1)** and click **Activate (2)**

You will see "Active" next to "Synchrony Financing – Pay Over Time."
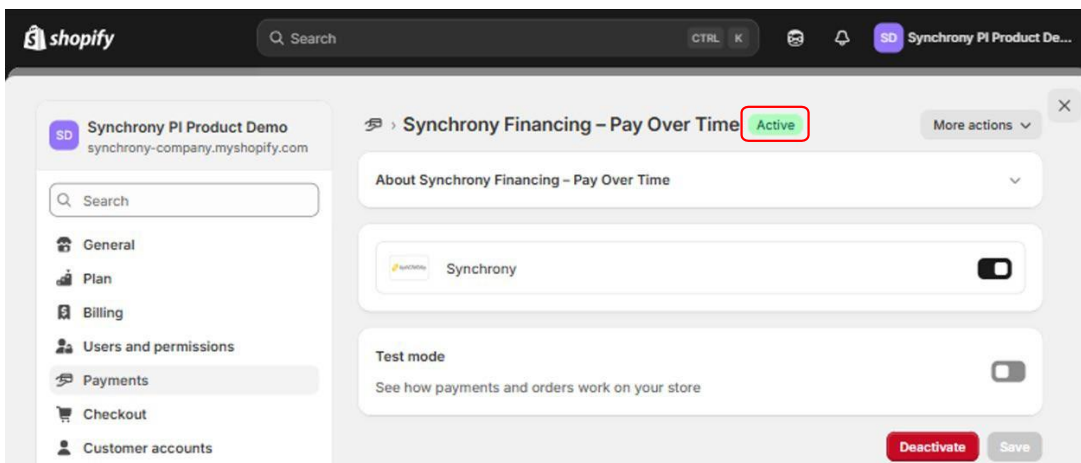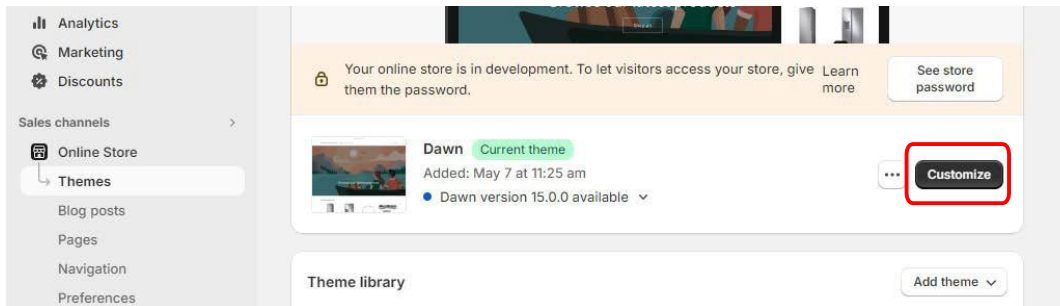

Once activated, the Synchrony Financing option will be available during checkout on your website.
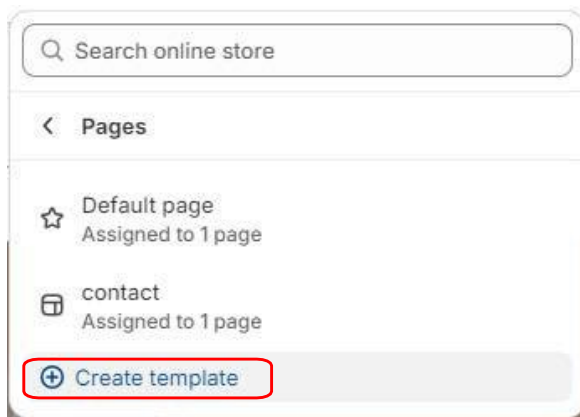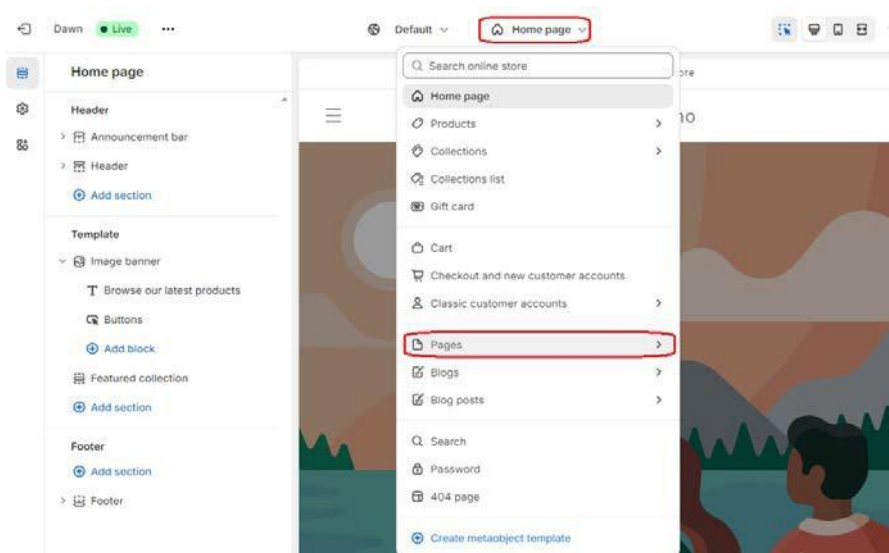
Customize Checkout Page Settings

If your Default Page template isn't working, you will need to create a new page template following the steps below.

- Log in to the Shopify Admin console

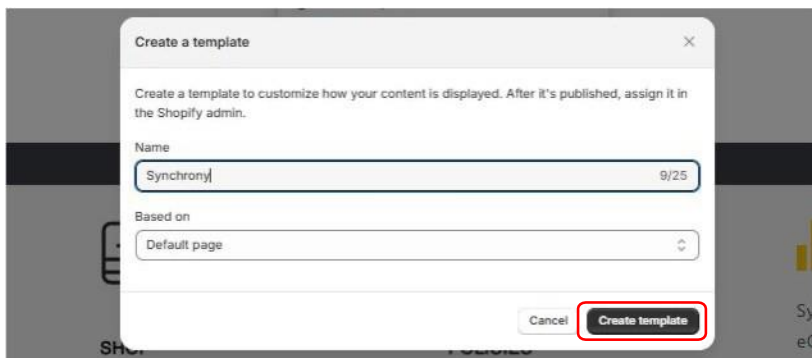- Click **Online store** > **Themes**, and then click **Customize**

- Create a new page template: From the Home page drop down, click **Pages** and select **Create template**
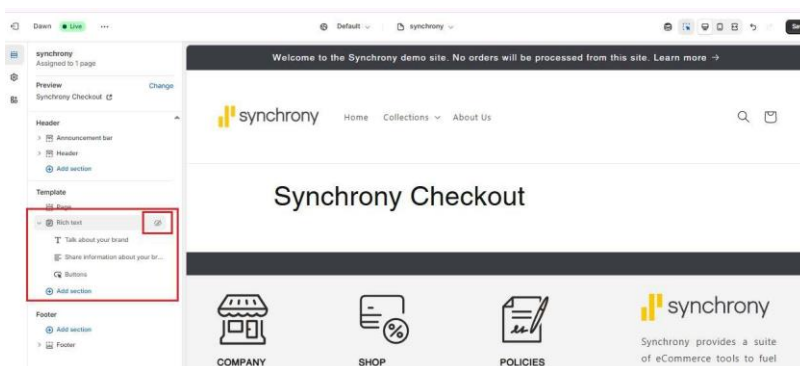
Customize Checkout Page Settings (Cont'd)

- **Name** the new template "Synchrony", **Based on** Default page, and select **Create Template**
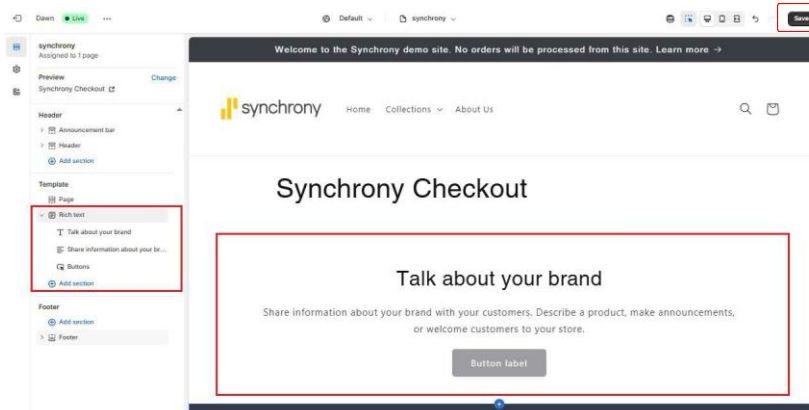

- Make sure the main elements of the template are visible and remove any additional widgets/extra formatting
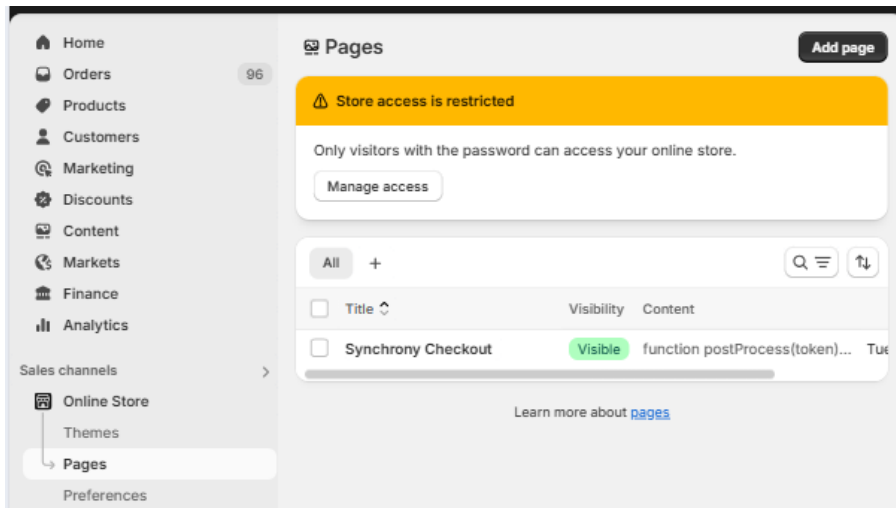
Main elements are hidden

Correct configuration

- Click the **Save** button in the top right corner and next click the Exit left top corner.

Customize Checkout Page Settings (Cont'd)

- Go to Online Store -> Pages Click on Synchrony Checkout.

- On the Synchrony Checkout page editor, change the Theme template to the Synchrony template you created in the steps above and click **Save**
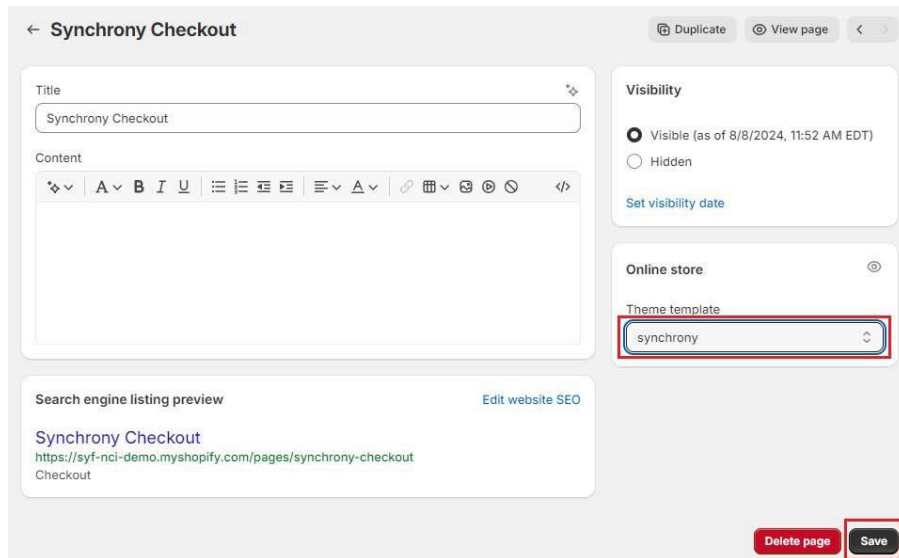
- Add a sample item to the cart and go to checkout. You should see the "Synchrony Financing – Pay Over Time." option, which verifies it is set up correctly

Customize Checkout Page Settings (Cont'd)

Payment

All transactions are secure and encrypted.

Synchrony Financing – Pay Over Time

After clicking "Pay now", you will be redirected to Synchrony Financing – Pay Over Time to complete your purchase securely.

Cash on Delivery (COD)

Money Order

Billing address

Select the address that matches your card or payment method.

Same as shipping address

Use a different billing address

‹ Return to shipping   Pay now


Bridget Solid Wood Bedroom Collection, Assorted Sizes And Sets $3,099.00
Queen / 4 Piece

Subtotal $3,099.00

Shipping   FREE

Total   USD **$3,099.00**
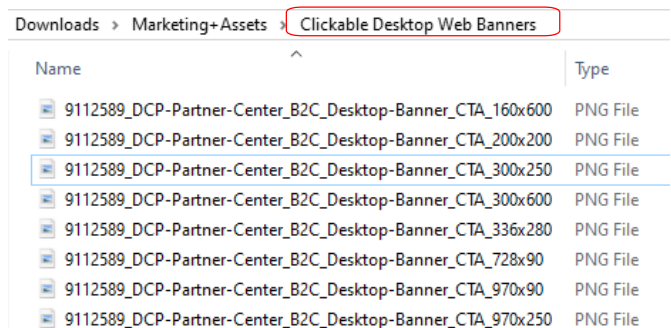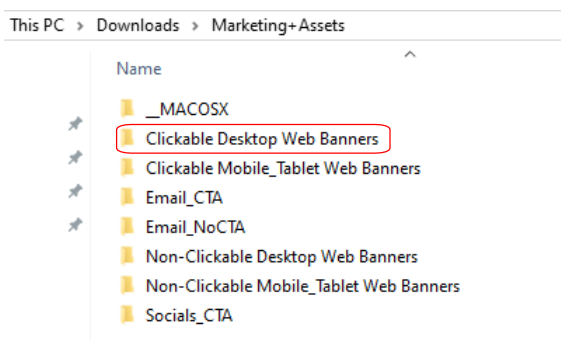
Adding Synchrony Advertising Banners

Synchrony eCommerce Solutions offers free effective and compliant downloadable digital marketing assets to help you promote Synchrony financing on your website. Do not create any custom images or other language to describe financing options. Using the Synchrony-approved language and assets helps protect you from compliance concerns.

> ⓘ *Advertising your Synchrony financing program can set you apart from competitors by highlighting that customers can apply for financing to help budget their purchase with you. Synchrony offers free, compliant, downloadable digital marketing assets to help you promote Synchrony financing on your website and on social media.*

- To download free marketing assets first go to **Partner Center**

- Click on Marketing Assets to download clickable and non-clickable legally compliant assets for desktop, tablet, and mobile
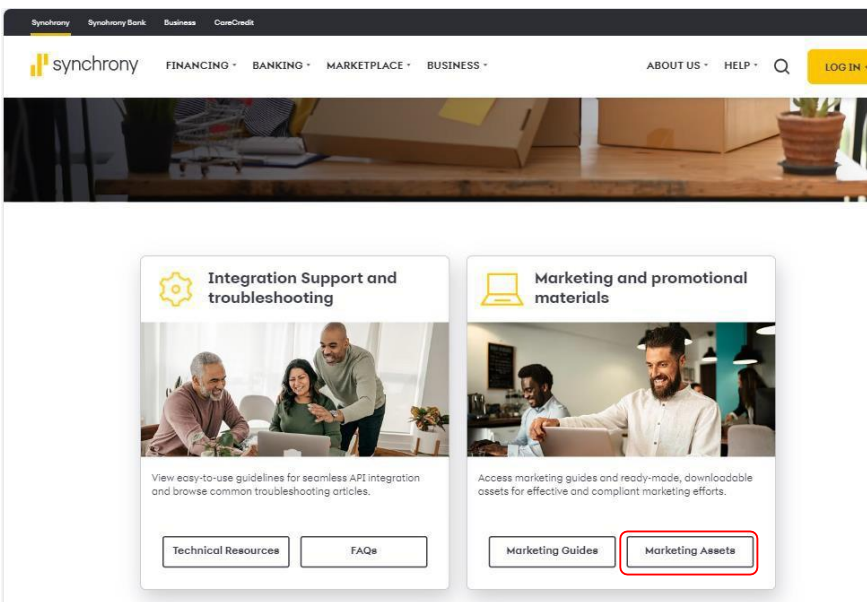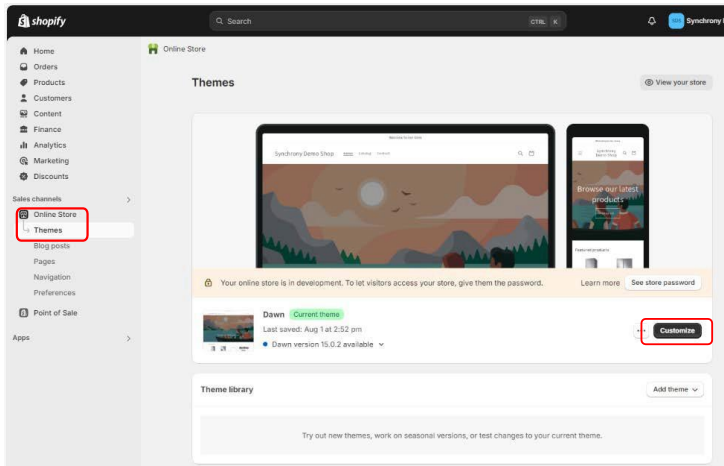

- Once you've download the assets you want to use, extract the zip file to a local drive
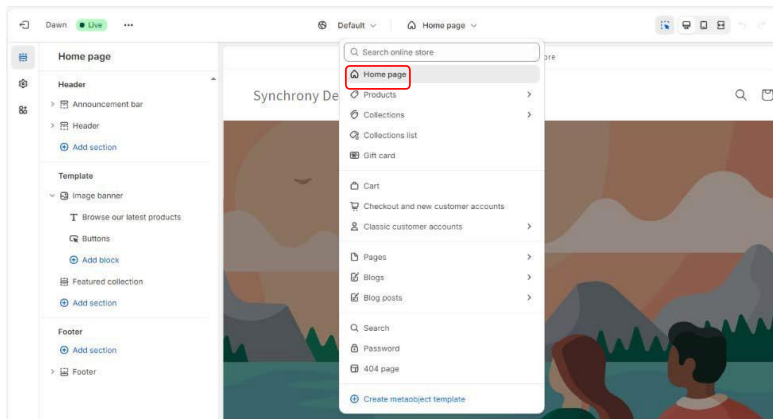
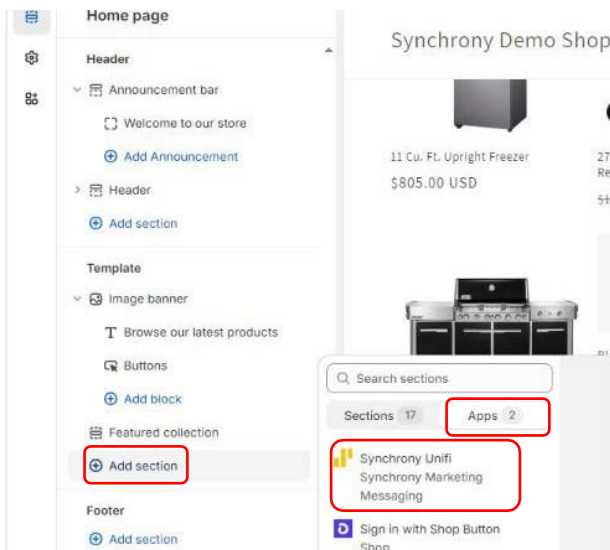# Adding Synchrony Advertising Banners (Cont'd)

- Next, log in to your Shopify Admin Console

- Go to Online Store > Themes > Customize

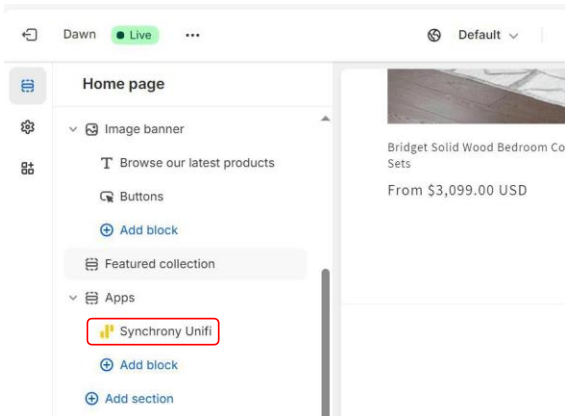- Select the page where you want to display the Synchrony advertising banner

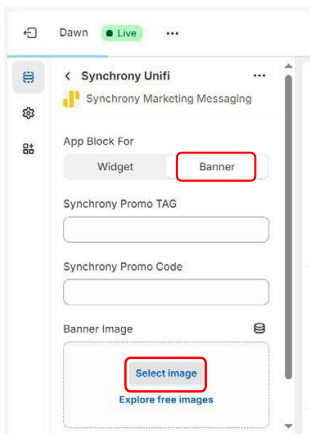- Click Add section > Apps > Select Synchrony

Adding Synchrony Advertising Banners (Cont'd)
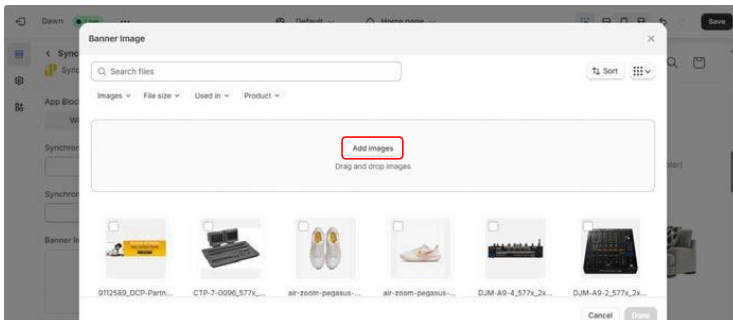
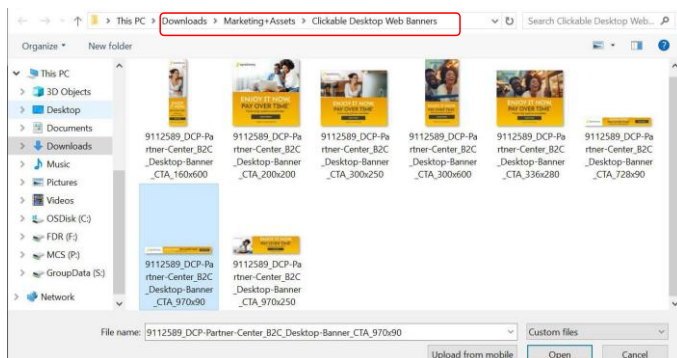- Click on Synchrony Unifi under Apps

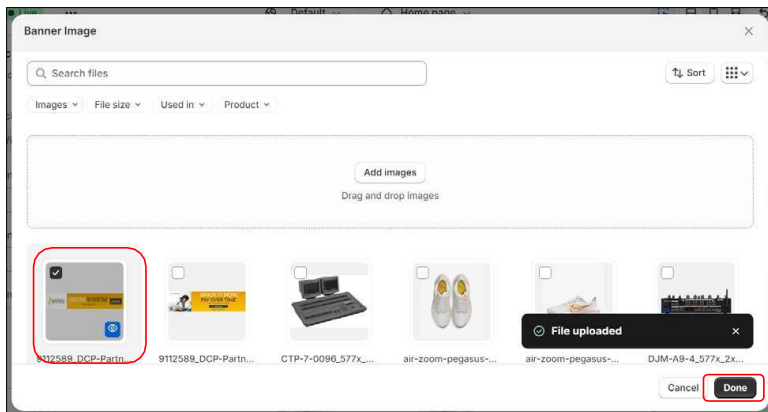- Select the Banner tab and click **Select image**

- Click **Add images**

- Go to the folder where you have extracted the Marketing Assets and select the desired image file
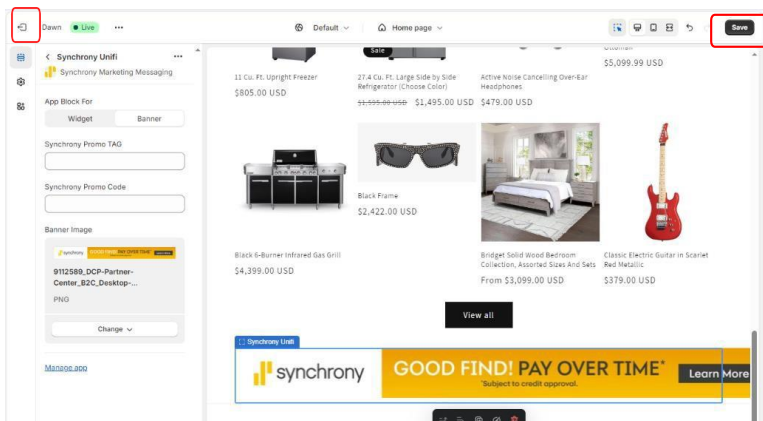
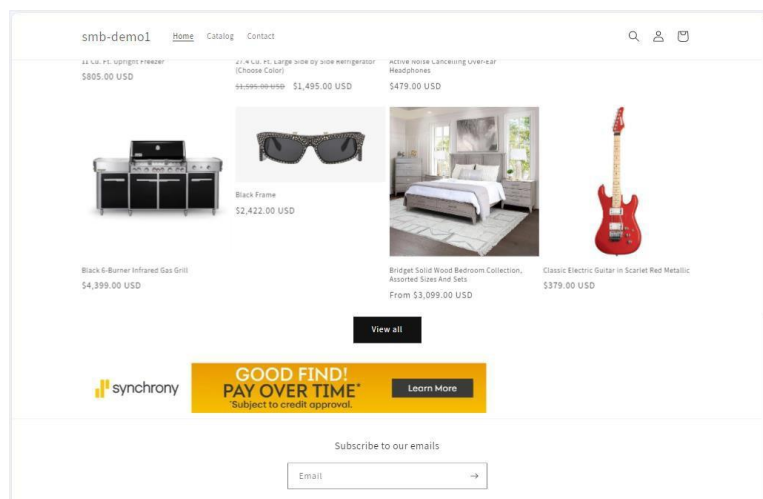# Adding Synchrony Advertising Banners (Cont'd)

- After your image(s) has been uploaded, click on the image thumbnail(s) to select it and click **Done**

- Click **Save** and exit the theme by clicking the exit icon

The advertising banner will display on your selected page.

Here to Help

If you need more information about using your Synchrony Financing Shopify extension, send an email to
helpdesk@synchrony-ecommerce.zendesk.com

Or visit the Synchrony Partner Center
synchrony.com/business/partner-center

Within Partner Center, there is a chat agent to provide additional support if needed. You can also use the chat agent to open a support ticket.