Installation Manual for PowerPay JTL

This manual describes the installation and usage of the PowerPay extension for JTL.

Release Date: Tue, 11 Dec 2018 09:38:32 +0100
Version: 2.0.167

customweb GmbH
General-Guisan-Strasse 47
CH-8400 Winterthur

E-Mail: info@customweb.ch

Phone:
CH: +41 (0)44 533 15 70
DE: +49 (0)180 3 729 636
UK: +44 (0)2036 086 268
US: +1 (0)650 618 3944

sellxed
a brand of customweb

Table of Contents

1 Introduction

This manual describes the installation, configuration and usage of the payment module for JTL and PowerPay.

Before starting the installation, make sure to have all necessary data at hand:

- PowerPay Merchant ID
- PowerPay Branch ID
- PowerPay Terminal ID
- PowerPay Authentication User and Passwort
- JTL payment module from sellxed.com/shop
- Login data for your server and shop

1.1 Installation Process

This document contains all the information you need to install the module. When activating the module, you should follow the described steps strictly as they guarantee the safe use of the module in compliance with all security regulations.

1. Enter the General Configuration into the main module
2. Configurate the payment methods
3. Conduct a test order
4. Activate your account

Installation Service

Our payment plugins should have per default the correct settings for most of our customers' preferences. That means once you have entered the required credentials in the plugin configuration to connect your account to your website, the plugin should be fully operational. Should you be willing to receive detailed informations on a setting you do not know, you may contact our support team who will be able to assist you further.

Our support team is at your disposal during regular business hours at: http://www.sellxed.com/support. Furthermore, you have the option of ordering our installation service. We will make sure the plugin is installed correctly in your shop: http://www.sellxed.com/shop/de/integration-und-installation.html

.htaccess Directory Protection

In order to test the module, any kind of directory protection or IP blocking on your server must be deactivated. This is crucial; otherwise the payment feedback of PowerPay might not get through to the shop.

2 Configuration

2.1 General Configuration

In order to configurate the module, go to the setting page in the main module of your shop and enter the data into the respective fields.

2.2 Payment Method Configuration

The next step is the payment method configuration. As a new payment method, you should find PowerPay Open Invoice among the available payment methods of your webshop. Activate this payment methods.

Define whether you want to process invoices as monthly invoices or as order invoices in the field **invoice type**. The option you select has to be enabled in your customer account as well. If you decide to go with the option order invoices, you will receive the ESR data from PowerPay in the backend of your shop. The invoice will not be sent out by the plugin so you will need the data to create the invoices. If you prefer to carry out the authorization before the payment methods are dispayed, a credit check can be conducted in advance. The payment method will only be displayed if the PowerPay credit check yielded a positive result. In order to activate this method, set the Validation to before payment method display.

2.3 Testing

You can conduct a test with any address data. After successful testing, set the **mode** in the main module to Live.

3 Module Installation and Update in the JTL Shop

3.1 Installation

At this time you should already be in possession of the module. Should this not be the case, you can download the necessary files in your customer account in the sellxed shop (Menu "My Downloads Downloads"). In order to download the module in your shop, please carry out the following steps:

1. Download the plugin. The download can be found in your sellxed.com account under "My Downloads".
2. Unzip the archive you have just downloaded.
3. In the unzipped folder navigate to the folder "files"
4. For some shops there are different versions of the plugin provided. If this is the case open the folder which corresponds to your shops version.
5. Using your preferred FTP client upload **entire content** of this folder into the root directory of your shop. For some shops there is a specific folder containing the plugins. If thats the case upload the plugin into this folder. Make sure that the folders aren't replaced but merely merged.
6. If you haven't yet done so, log back into your shop.

3.2 Updates and Upgrades

You have direct and unlimited access to updates and upgrades during the duration of your support contract. In order to receive constant information about available updates we ask you to subscribe to our RSS feed that we publish for your module. More information regarding the subscription of this RSS feed can be found under: http://www.sellxed.com/en/updates_upgrades .

We only recommend an update if something doesn't work in your shop, if you want to use new feature or if there is a necessary security update.

3.2.1 Update Checklist

We ask you to strictly comply with the checklist below when doing an update:

1. Always do a back up for your database and your files in your shop
2. Use always a test system to test the update process.
3. Wait until all the files are copied to the shop, clear the cache if there is one in your shop and then visit the configuration page of the main module so that the update process will be initialized.

> Do not do updates directly in the live environment
>
> Please test the update procedure first in your test shop. Our support team is able and willing to help you if you experience problems with the update process. However, if you decide to perform the update directly in your live shop there is the possibility of a downtime of the shop of more than two days depending on the availability of our support if you do not want to book our complementary support.

Depending on the version it could be that the database has to be migrated. We recommend you therefore, to perform the updates in times when the shop is not visited too frequently by your customers

3.2.2 Update Instructions

Please always read the update instruction. They can be found on the plugin page in the shop under the section change log on the lower end of the page. If there are no special remarks, you can proceed by just overwriting the files in your system

4 Module Configuration in the JTL Shop

The configuration consists of two steps. The first step is the configuration of the main module with all the basic settings (cf. Configuration of the Main Module). During the second step you can then carry out individual configurations for each payment method . This allows for full flexibility and perfect adaptation to your processes.

> Create back-ups!
>
> Please create a back-up of the main directory of your shop. In case of problems you will then always be able to return your shop to its original state.
>
> We furthermore recommend testing the integration on a test system. Complications may arise with third party modules installed by you. In case of questions, our support is gladly at your disposal.

4.1 Configuration of the Main Module

In a first step the plug-in must be installed. The installation of the plug-in is carried out under: **Plug-ins > Plug-in administration > PowerPay .** By clicking on **install**, the plug-in is installed in your shop. You can find the settings for the main module under **Plug-ins > PowerPay** .

In order to configure the main module, go to **Plug-ins > PowerPay** . Change to the tab **Configurations**. Enter the data and settings you have already saved in the back-office of PowerPay. In case of questions, you can find further information by moving the cursor to the question mark.

In the tab **Information** you can find important information on the plug-in such as the version number, release date and callback URL. This data is important when contacting our support.

You have the option of synchronising the order status with the transactions with PowerPay. This means that when an item is sent or cancelled, you have the possibility of automatically also debiting the payment with PowerPay. Further information can be found in the section The Module in Action.

4.2 Configuration of the Payment Module

After having successfully configured the main module, you can find the settings for the individual payment methods in your shop under **Payment Processing > Payment Methods** . Each payment method is listed individually. Install the payment methods you wish to offer you customers in your shop. You can carry out individual settings for each payment method and thereby optimally adapt the payment methods to your existing processes. The most central options are described in more detail further below.

In order for the payment method to be displayed in the shop, you must link them with a shipping method. Open the shipping methods under **Payment Processing > Shipping Methods**. By clicking

edit, you can modify the shipping methods. Here you can link the payment methods you wish to offer and also have the option of setting individual payment fees.

4.2.1 Configuration of payment methods in the WaWi

In order for the JTL WaWi to map the payment methods from the shop, make sure that you add them inside the WaWi Einstellungen > Zahlungsarten verwalten). Make sure that they are spelled exactly as written in the colum "Anmerkung".

4.3 Shop ID

In the case of a multi-store set up (cf. chapter: Multi-Store), the parameter Shop ID identifies the shop's request and, therefore, redirects the feedback of PowerPay based on the shop ID.

4.4 Order Prefix

With the option order prefix you can define your own order scheme for the transmission to PowerPay. This option helps you identify to which shop a transaction the back-end of PowerPay is related to. The tag "{id}" will automatically be replaced be the consecutive order number.

4.5 Selecting the Authorisation Method

You can choose between two options of authorizing credit card payments. By selecting one of the two under the option 'Authorisation Methods', you define how you want to process the individual payment methods.

Further information on the various authorisation methods can be found on our sellxed website.

> Payment Processing
>
> Please pay attention to the fact that you require the activation of further options with PowerPay in order to use some of the authorisation methods.
>
> It may be that certain authorization methods are not available for every payment method.
>
> Alongside the introduction of PCI 3 there are additional certification requirements in case you are using the authorization method Hidden or AJAX. Please contact PowerPay for further information or switch to another authorization method.

4.6 Direct Capturing of Transactions

The option "Capture" allows you to specify if you wish to debit payments directly or if you first wish to authorise them and the debit the payment at a later point.

Depending on your acquiring contract, a reservation is only guaranteed for a specific amount of time. Should you fail to debit the payment within that period, the authorisation may therefore no longer be guaranteed. Further information on this process can be found below.

> Different settings between PowerPay and the module
>
> It may be that settings saved in the payment modules overwrite settings saved in PowerPay.

4.7 Uncertain Status Status

You can specifically label orders for which no 3D-Secure verification nor any other security mechanism was carried out. This allows you to manually control the order before shipment.

4.8 Optional: Validation

Note: It can be that this option is not visible in your module.In this case just ignore this section.

With the option 'Validation' you can define the moment when the payment method should be made visible to the customer during the checkout process. This setting is relevant for modules where the usage depends on the customer's compliance with specific preconditions. For example, if a solvency check has to be carried out or if the payment method is only available in certain countries. You have the choice between these options:

- **Validation before the selection of the payment method:** A validation verification is carried out before the customer selects the payment method. If he or she does not fulfill the requirements, the payment method is not displayed
- **Validation after selection of the payment method:** The verification of the compliance occurs after the selection of the payment method and before the confirmation of the order
- **During the authorisation:** The validation verification is carried out by PowerPay during the authorisation process. The payment method is displayed in any case

4.9 Multi-Shop Set-Up

The payment module is designed for the usage of one PowerPay contract for several shops. It must be differentiated, however, between the case of an integrated multi-shop functionality and independent shops:

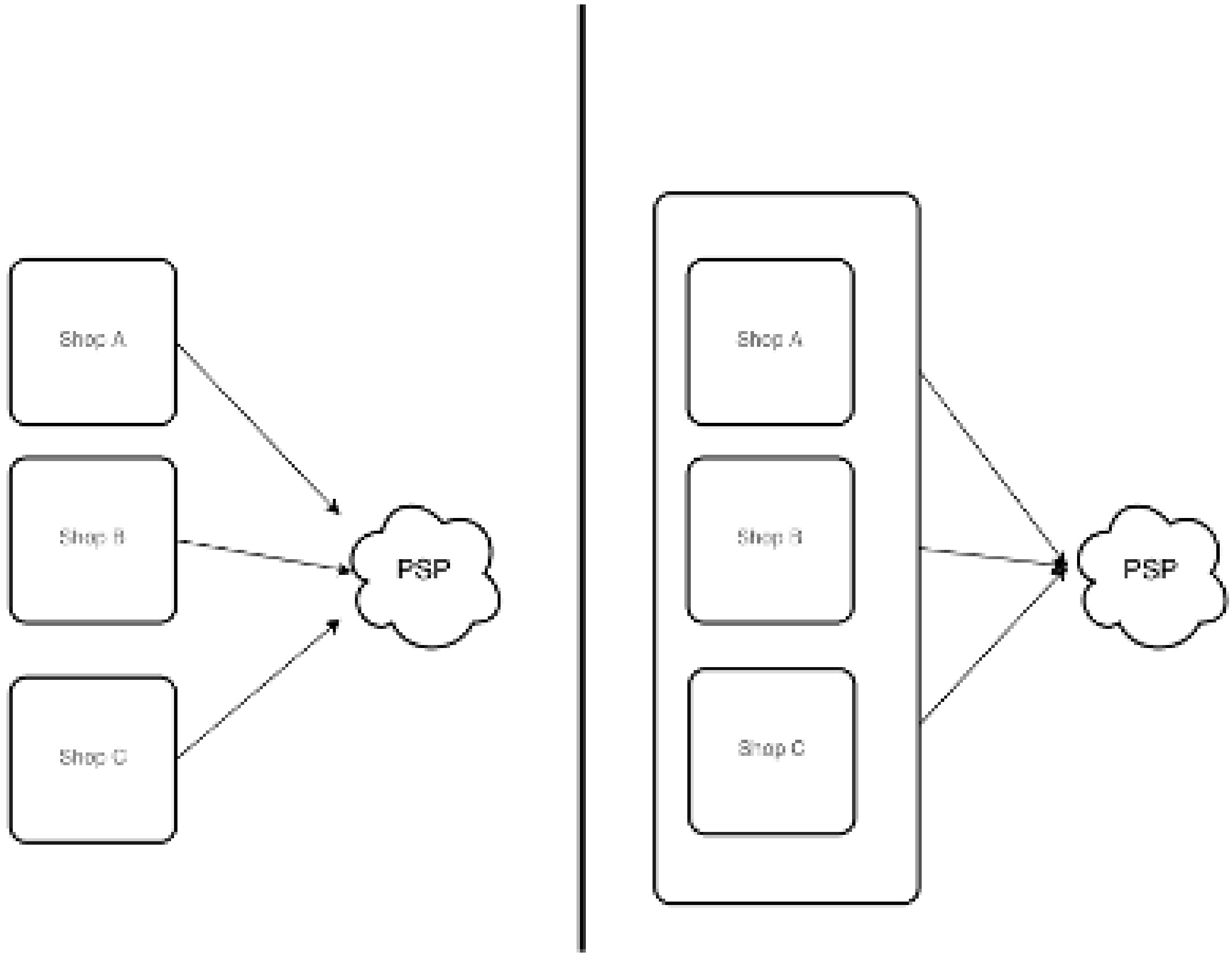

Figure 4.1: Multi-shop set-up

Licensing

In the case of independent shops, you require a payment module license for each shop. For scale prices, please contact us directly.

5 Settings / Configuration of Payment Methods

5.1 General Information About the Payment Methods

All sellxed payment modules are delivered with the most common payment methods. In case a desired payment method is not included per default, please contact us directly.

In order to be able to use a payment method, it must be activated in your account with PowerPay as well as in your shop. Information about the configuration of the payment methods can be found further above.

Below you can find important information for specific payment methods that deviate from the standard process.

5.2 Information on Payment Status

For each payment method you can define an initial payment status (status for authorized payments etc.). You hereby define the payment status for each state depending on the processing type of the order (captured, authorized, etc.). It's the initial status which the order assumes. Depending on the mutation carried out by you, the status can change.

Important info regarding Order Status

Never set the status to **Pending PowerPay** or any similar pending status which is implemented by the module.

5.2.1 Order status "pending" / imminent payment (or similar)

Orders with the status 'pending PowerPay' are pending orders. Orders are set to that status if a customer is redirected in order to pay but hasn't returned successfully or the feedback hasn't reached your shop yet (Customer closed window on the payment page and didn't complete payment). Depending on the payment method these orders will automatically be transformed into cancelled orders and the inventory will be cleared (so long as the Cronjob is activated). How long this takes depends on the characteristics of the payment method and cannot be configured.

If you have a lot of pending orders it usually means that the notifications from your webserver to PowerPay are being blocked. In this case check the settings of your firewall and ask the Hoster to activate the IPs and User Agents of PowerPay.

5.2.2 Order status "cancelled"

Orders with the status "cancelled" have either been set to that status automatically due to a timeout, as described above, or have been cancelled directly by the customer.

6 The Module in Action

Below you will find an overview over the most important features in the daily usage of the PowerPay module.

6.1 Useful Transaction Information on the Order

You can find an overview over all the most important information of a transaction in all orders that have been processed with the sellxed module. Among others, this information allows for the definite attribution of the orders to their corresponding transaction, seen in the back-end of PowerPay.

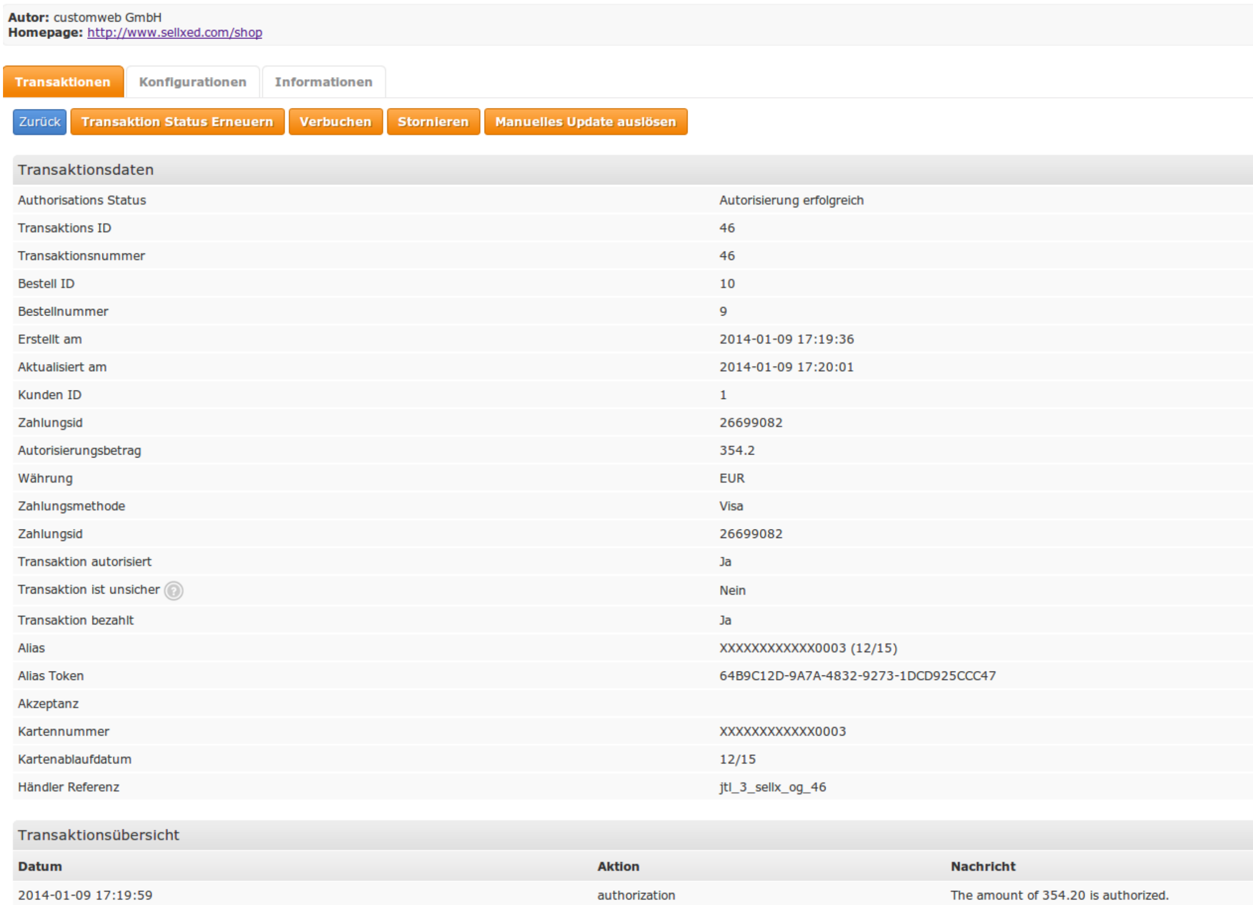

Figure 6.1: Transaction Information in the JTL Back-End

The payment information is also transmitted to your JTL WaWi Client.

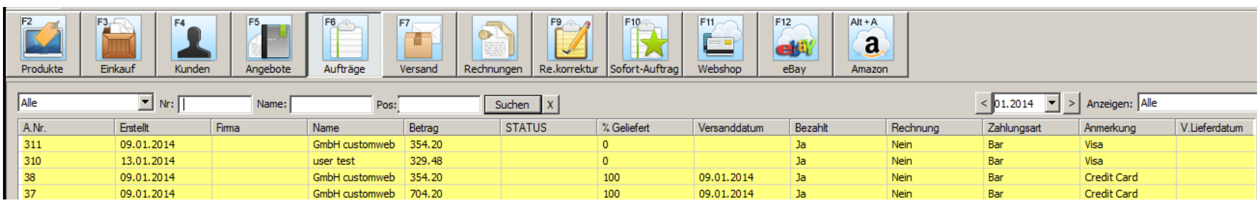

Figure 6.1: Transaction Information in JTL WaWi

6.2 Transaction Management within the JTL Shop

The transaction management can be carried out from within the shop.

6.2.1 Capturing of Orders

You can directly debit orders in the back-end of your shop. In order to do so, switch to the tab **Transactions**. You can now search for the order number and then click on **Show** in order to find further information about the transaction. If you wish to capture an order, click 'capture'. Here you can modify the amount and the items. By clicking **Capture**, the action will be transmitted to PowerPay.

In case you do not want to capture all items of the order, you can also close the transaction for further captures.

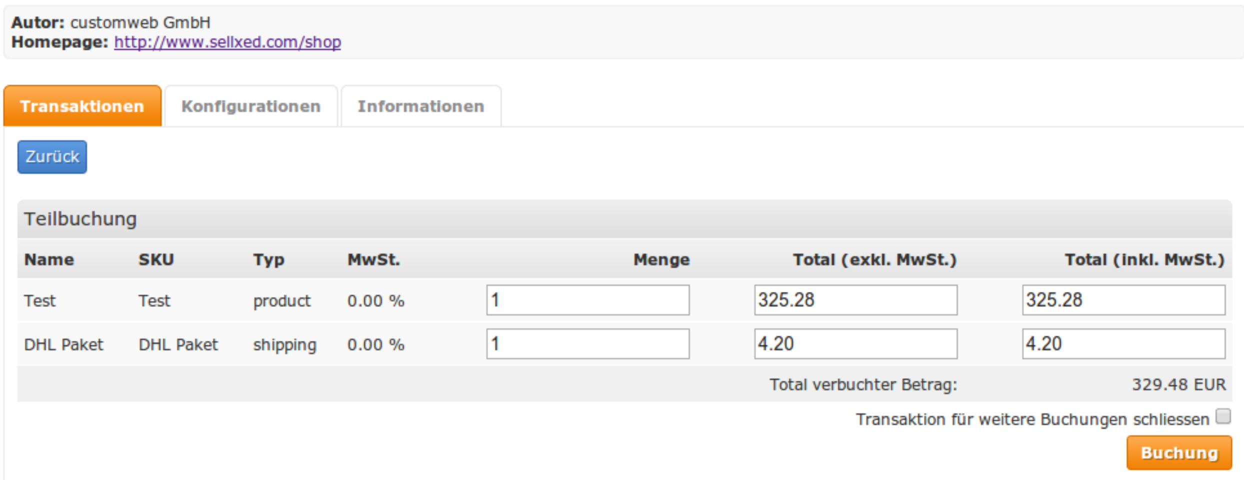

Figure 6.1: Capturing of Orders in JTL Back-End

> Partial Capturing
>
> Please find out if the capturing of partial amounts is supported by your PowerPay contract. If this is not the case, it might happen that the transaction is closed for further transactions after a partial capture.

6.2.2 Cancel Orders

In order to cancel an order, open the corresponding transaction. By clicking **Cancel** , a cancellation of the payment occurs with PowerPay. The reserved amount on the customer's card will be released automatically.

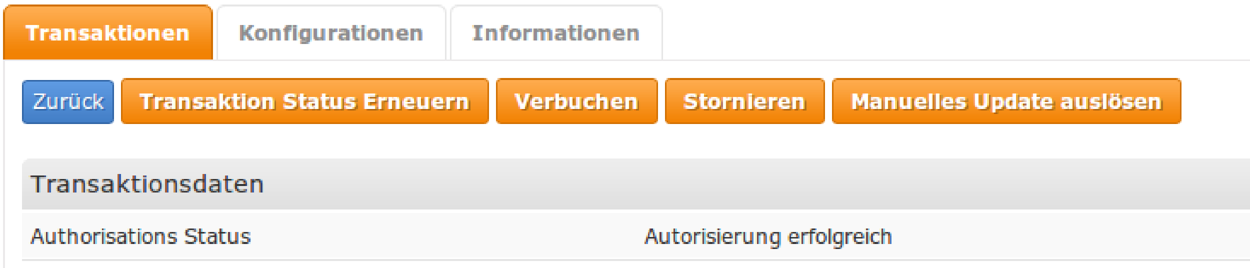

Figure 6.1: Cancelling of Orders in the JTL Back-End

6.3 Refunds

You can also create refunds for already debited transactions and automatically transmit these to PowerPay. In order to do so, open the invoice of the already debited order (as described above). By clicking on **Refund** a dialog box for refunds will open up. Insert the amount you wish to refund and then click on **Refund**. The transaction will now be transmitted to PowerPay.

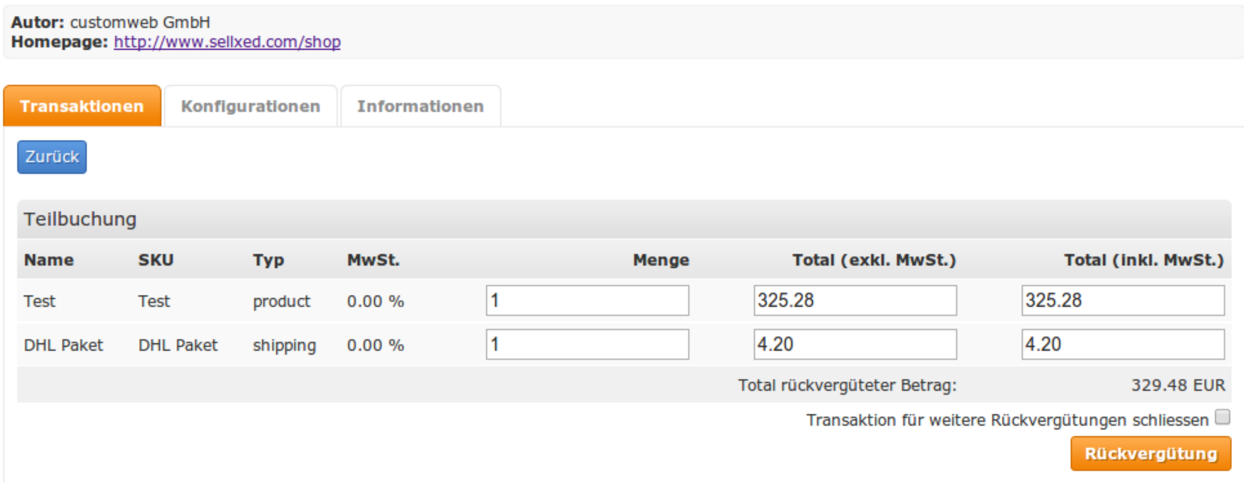

Figure 6.1: Refunds Directly from Within the JTL Back-End

Please note that you can't refund more than 100% of the originally authorised amount.

6.4 Setting up Cron Job

In order to activate the time-controlled functions of the plugin (such as update service, deleting pending orders, etc.) set up a time-controlled request in your hosting on the URL, which you will find via Plugins > Plugins >PowerPay in the tab "Extended Information". Invoking it regularly will trigger the actions.

Here we suggest you use a Cron Engine like for example EasyCron. This allows you to open the file (URL) with an external service.

7 Testing

Before switching from test to live mode it is important that you test the module extensively. You can find all relevant test credit card data under: http://www.sellxed.com/de/testen.

> **Testing**
>
> Do not forget to switch the operating mode from test to live after having successfully tested the module.

7.1 Test Data

In the following section you can find the test data for the various payment methods:

Open Invoice

First Name	Good	Accepted
Last Name	Customer	
Notice	Other fields can be filled at your discretion.	
Reason	Unknown customer	Denied
First Name	Unknown	
Last Name	Customer	
Gender:	Male	
Street	via castello 4	
Postcode	6500	
City	Bellinzona	
Country	Switzerland	
Reason	Other	Denied
First Name	Bad	
Last Name	Customer	
Gender:	Male	
Street	via paradiso 5	
Postcode	6600	
City	Locarno	
Country	Switzerland	

8 Errors and their Solutions

You can find detailed information under http://www.sellxed.com/en/faq. Should you not be able to solve your problem with the provided information, please contact us directly under: http://www.sellxed.com/en/support

8.1 The name of the payment method is not shown correctly in the email.

Depending on the name of the payment method and due to the naming convention, the name of the payment method in the email can be slightly strange. You can avoid this by adapting the email template. Go to Content > Email Templates.

In the order email you can replace the following '{$Bestellung->cZahlungsartName}' with '{$Bestellung->Zahlungsart->caption}'. From then on, the name you set in the payment configuration will be shown.

8.2 Releasing Payment Information via Email

Certain payment methods request that the payment information should be sent via email (for example Vorkasse). This always works for the confirmation of the payment. This will be sent if the authorization was successful. If the payment information should be shown in the order email, the module needs to carry out the payment before completing the order. Pay attention to the the settings in the configuration of the payment method.

8.2.1 Adjusting the HTML Templates

In order for this to work it will be necessary to make changes to the settings of the email templates. The following steps need to be taken:

{if !empty($Bestellung->cwPaymentInformation)}
{$Bestellung->cwPaymentInformation} {/if}

This needs to be added to each language, text and HTML.

8.2.2 Adjusting the Plain Text Email Templates

To display the information in the plain text email please add the following snippet to the desired location:

{if !empty($Bestellung->cwPaymentInformation)} {$Bestellung->cwPaymentInformation|replace:"
":"\n"|strip_tags:false} {/if}

This needs to be added to each language, text and HTML.

8.3 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the PowerPay Referrer URL might appear in your Analytics Tool thus hiding the original traffic source. However, most Analytic Tools are able to minimize this problem.

In case you are using Google Analytics as reporting tool, this step by step guide may help you to exclude the URLs: under bullet point 4.

9 Compatibility with Third-Party Plugins

The plugins listed below are compatible with our payment modules and allow you to handle certain tasks in a easier way.

9.1 Birthday and gender in JTL

For certain payment service providers it is necessary to check the birthday an the gender of a customer. JTL does not check this by default. These checks can be enabled under "Einstellungen > Kunden / Formulare > Anrede abfragen" and "Einstellungen > Kunden / Formulare > Anrede abfragen" respectively.

10 Error Logging

The module will log different unexpected errors or information depending on the configured level. If there is any issue with the module, this log can help identify the cause.

10.1 Log Levels

You can configure the log level in the PowerPay settings. The logs are stored according to this setting and are not affected by the shopwide log level settings.

- Error: Logs unexpected errors only. (Default)
- Info: Logs extended information.
- Debug: Logs information helpful for debugging.

10.2 Log Location

The log messages are visible in the JTL backend under the menu item **Admin > Systemlog**.

11 Advanced Information

This section of the manual is for advanced usage of the module. The content is for advanced users with special requirements. Everything in this section is optional and not required for the daily usage of the module.

11.1 Transaction Object

This section describes how to extract information from a transaction, if you need it for further processing. E.g. You require more information of the transaction for further processing an order in your erp system.

The code snippets in this section assume your script resides in the root folder of the shop with the default shop folder structure.

Have JTL initialized in your script, this is required for the database connection.

```
require_once("includes/globalinclude.php");
```

Include the module main file and modules Transaction class.

```
require_once 'includes/plugins/powerpaycw/version/100/init.php';
require_once 'includes/plugins/powerpaycw/version/100/classes/PowerpayCw
/Entity/Transaction.php';
```

Now you can load the transaction and then extract the transactionObject.
Load the transaction by Id:

```
$transactionById = PowerpayCw_Entity_Transaction::loadById
($transactionId);
$transactionObject = $transactionById->getTransactionObject();
```