

Installation Manual for Unser Magento

This manual describes the installation and usage of the Unser extension for Magento.

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1 Introduction

This manual explains the installation, configuration and usage of the payment module for Magento and Unzer.

Before beginning with the installation, please make sure that you are in possession of all necessary data:

- User name and password for the login to the backend of Unzer
- Magento payment module as ZIP file.
- Access data to your server and shop

Partial cancellations can only be processed in a limited manner via the shop backend. You may select the option "Close order" while capturing an order, then all items not part of the capture will be cancelled. Pure partial cancellations must be processed via the Insights of Unzer.

The checkout must be served via https for the payment methods to be available.

Note that you must use at least PHP version 5.6 for our plugins. PHP 8 or higher is currently not supported.

1.1 Procedure of the Installation

In this document you will find all important information for the installation of the module. It is important that you strictly follow the checklist. Only this will guaranteed a secure usage of the plugin in correspondence with all security regulations.

1. Configuration of the test environment by means of the integration data from Unzer. These can be found on the test platform under <https://sbx-insights.unzer.com/>
2. Configuration of the basic settings of the payment module
3. Configuration of the payment methods
4. Carrying out of a test purchase by means of the attached [test data](#) at the end of this document
5. If the test was successful, you can configure the live data in your shop. Log into the live environment with the obtained access data under: <https://insights.unzer.com/>

.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 as otherwise the payment feedback of Unzer might not get through to the shop.

1.2 System Requirements

In general, the plugin has the same system requirements as Magento. Below you can find the most important requirements of the plugin:

- PHP Version: 5.4.x or higher
- Magento: 1.7.x or higher
- OpenSSL: Current version with support for TLS 1.2 or higher.
- fsockopen: The PHP function fsockopen must be enabled. The plugin must be able to connect to external systems over the Internet.
- PHP Functions: All common PHP functions must be enabled.

2 Configuration

2.1 Live Environment

You find the necessary credentials in your Unzer Account (<https://insights.unzer.com/>). You need the following:

- API Private Key
- API Public Key

Log into your Unzer account and go to "Settings > Configuration". There you'll find the necessary credentials.

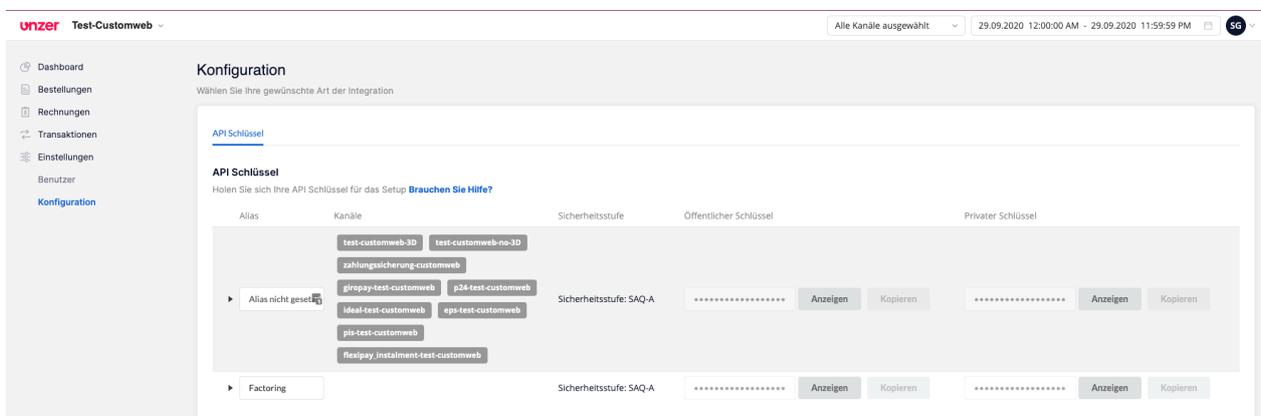


Figure 2.1: API Keys

Now enter those two keys into the main configuration of the plugin in your shop.

2.2 Test Environment

To login to the test environment you can use the following URL: <https://sbx-insights.unzer.com/>

3 Module Installation and Update in the Magento Shop

3.1 Installation

At this time you should already be in possession of the module. In order to install the module in your shop, please carry out the following steps:

1. Unzip the archive you have just downloaded.
2. In the unzipped folder navigate to the folder "files"
3. For some shops there are different versions of the plugin provided. If this is the case open the folder which corresponds to your shop version.
4. 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 that is the case upload the plugin into this folder. Make sure that the folders aren't replaced but merely merged.
5. If you haven't yet done so, log back into your shop.

In the following you will find the installation manual for Magento 1 as well as Magento 2

3.1.1 Magento 1

Compiler Cache / Caching

Before you start the installation or after doing an update of the module, please make sure, that the compiler cache is disabled. Also make sure that you cleared the cache otherwise it could be that the settings page is not visible.

1. Create a back-up of your shop.
2. Extract the content of the ZIP file.
3. Copy the **entire content** of the folder "files" into the main directory of the server of your shop respectively to the folder where the plugins are copied normally. In order to do so, use your usual ftp program. Make sure that the folders aren't replaced but merely merged.

3.1.2 Magento 2

Im Folgenden werden die Schritte für die Installation und das Update der Extensions erklärt.

3.1.2.1 Installations Requirements

Bitte beachten Sie, folgende Voraussetzungen sind für den Betrieb von Magento 2 zwingend zu erfüllen:

1. System requirements von Magento (<http://devdocs.magento.com/guides/v2.0/install-gde/system-requirements.html>)
2. Der Cron Job muss korrekt eingerichtet sein, sonst können keine Extensions installiert werden. Weitere Informationen finden Sie hier: <http://devdocs.magento.com/guides/v2.0/config-guide/cli/config-cli-subcommands-cron.html>

3.1.2.2 Installation

For the installation of the plugin in your Magento 2 store please follow these steps:

1. Readiness Check

Before uploading the plugin it is necessary to do the Readiness Check for Magento 2

1. Save [this script](#) as cw-setup.php on your computer.
2. Upload this cw-setup.php Script into the root directory of your Magento 2 installation.
3. Access your server via SSH and run this command: php cw-setup.php
4. The script will present you with additional commands which you need to execute.

About the cw-setup.php script

The provided script generates a set of commands which should be executed to clean up Magento 2. The script itself doesn't execute anything. It only generates the necessary commands.

2. Upload

Upload the content of the folder **files_2** into the root directory of your server. Execute the commands provided by the cw-setup.php script again.

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.

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 backup 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.

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. Those instructions can be found in the changelog. If there are no special remarks, you can proceed by just overwriting the files in your system.

3.2.2.1 Magento 1

1. Extract the ZIP file.
2. Upload the folder **files_1** into the root directory of your shop.
3. Clear the Magento cache

3.2.2.2 Magento 2

1. Extract the ZIP file.
2. Upload the folder **files_2** into the root directory of your shop.
3. Clear the Magento cache

3.3 Database Migration

This section describes how you can run the database migration script

This only needs to be done if your Magento installation shows error messages regarding missing tables or columns in the database.

3.3.1 Magento 1

Clear the Magento cache

If this does not resolve the issue, remove the entry `unzercw_setup` from the `core_resource` table and clear the cache again.

3.3.2 Magento 2

From the command line run the following command:

```
php bin/magento setup:upgrade
```

4 Module Configuration in the Magento 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 backups!

Please create a backup 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

4.1.1 Magento 1

The settings for the main module can be found under **System > Configuration > Unzer**. Enter the various options, some of which you have already specified in the configuration with Unzer. Information on the functionalities as well as the impact of the individual settings can be found directly by the option.

The field "Time-Out for pending Payments" defines after how many minutes the order status should switch from pending to cancelled (0 means that nothing should be changed) if no successful feedback concerning the payment is received from Unzer. This might occur e.g. if the customer has closed his or her browser. Further information on this topic can be found under [Order Status](#).

4.1.2 Magento 2

You will find the settings of the main module via **Stores > Configuration > Sales > Unzer > General**

Fill in the fields according to the configuration of Unzer or with the data which you received directly from Unzer. You can find more exact explanations regarding each option in the help text by the input boxes.

Shop



Kunden Alias Management	<input type="text" value="Nein"/>	[STORE VIEW]
	Sie können Ihren Kunden gestatten ihre Aliasse auf ihrem Konto zu verwalten/löschen.	
Benachrichtigung abwarten	<input type="text" value="Nein"/>	[WEBSITE]
	Es kann in einigen Fällen ein paar Sekunden dauern bis die Transaktion erfolgreich genehmigt wird. Wenn diese Option aktiviert ist, wird die Benachrichtigung erwartet.	

General



Betriebsmodus	<input type="text" value="Test Modus"/>	[STORE VIEW]
	If the test mode is selected the test account id is used. Otherwise the configured live account id is used.	
Live account ID	<input type="text"/>	[STORE VIEW]
	The live account ID as given by the Salesway .	
Live API password	<input type="text"/>	[STORE VIEW]
	The live API password as given by Salesway .	
Test Account ID	<input type="text"/>	[STORE VIEW]
	The test account ID as given by the Salesway . Generic test account: 401860-17795278	
Test API password	<input type="text"/>	[STORE VIEW]
	The test API password as given by Salesway . Password for generic test account: 8e7Yn5yk	
Liability Shift Behavior	<input type="text" value="Mark transactions without liability shift as uncertain"/>	[STORE VIEW]
	If no liability shift is given by a transaction, should the transaction be marked as uncertain?	
Bestell-Präfix	<input type="text"/>	[STORE VIEW]
	Here you can insert an order prefix. The prefix allows you to change the order number that is transmitted to Salesway . The prefix must contain the tag {id}. It will then be replaced by the order number (e.g. name_{id}).	

Figure 4.1: Magento 2: Configuration of the basic module. Please note, that this is an example and the settings can differ.

4.2 Configuration of the Payment Method

4.2.1 Magento 1

After having successfully installed the main module, you will find the individual payment modules under System > Configuration > Payment Methods. You can save 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.

4.2.1.1 Direct Capturing of Invoices

The "Invoice Creation" specifies if invoices should be captured directly or not. Captured invoices can no longer be modified. If you wish to be able to modify the ordered article for debiting, please set this option to "Deferred".

4.2.2 Magento 2

After having successfully configured the main module, you will find the settings for each payment method in your shop via Stores > Sales > Payment Methods. For each payment method you can change the settings individually to optimize the payment processing in your shop.

4.2.2.1 Accounting

For each payment method you need to choose whether you want to register directly or delayed. A delayed booking only reserves the amount. Therefore it is important that you follow the instructions for such transactions as listed below. Reservations are usually only valid for a few days so we recommend to register directly. The delayed booking isn't available for every payment method.

4.2.2.2 Authorization Method

For some payment methods you can choose between different authorization methods. The authorization method determines how the payment form is presented in your shop.

4.3 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 then debit the payment at a later point.

Depending on your acquiring contract, a reservation is only guaranteed for a specific period 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 Unzer and the module

It may be that settings saved in the payment modules overwrite settings saved in Unzer.

4.4 Uncertain Status

You can specifically label orders for which the money is not guaranteed to be received. This allows you to manually control the order before shipment.

4.4.1 Setting the order state

For each payment method you may select in which state the order should be set to depending on the booking state. This is the initial state of the order.

4.5 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. In order for the credit check or address validation to also work with European characters, the charset of the "Blowfish mode" must be set to "UTF-8" for certain PSP settings.

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 the customer 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 Unzer during the authorisation process. The payment method is displayed in any case

4.5.1 Usage of the Integrated Multishop Functionality of Magento

The payment module supports the multishop feature of Magento. No further modifications are necessary. The module automatically recognises the shop the order belongs to. In order for the multishop functionality to work, it is, however, necessary that the individual sub-shops within Magento have been configured correctly.

5 Settings / Configuration of Payment Methods

5.1 General Information About the Payment Methods

The plugin contains 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 Unzer 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 Unzer** 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 Unzer' 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 Unzer are being blocked. In this case check the settings of your firewall and ask the Hoster to activate the IPs and User Agents of Unzer.

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.

5.3 Invoice

The fundamental concept of invoice is that the goods are shipped before the buyer pays the outstanding amount. That implies that the buyer has a limited time to carry out the payment to the merchant's bank account.

In case the buyer returns some of the items, you should create a refund. This does also work if the buyer has not yet paid the invoice. In this case, the outstanding amount will be reduced accordingly.

5.4 Prepayment

In case of prepayment, the buyer has to pay the invoice before the merchant ships the goods.

To realize this process, the shop needs to be informed about incoming payments. For this purpose the order is marked as uncertain until Unzer notifies the shop about the successful payment via a background request. This leads to the uncertain state being lifted and is the trigger to go ahead and start the shipment process.

In case the customer decides not to order all items, you can create a refund. This is possible even before the buyer has paid the amount. In this case the outstanding amount is reduced so that the lower payment by the buyer will still trigger the shipment process by lifting the uncertain state.

5.5 Instalment

Instalment as a payment method allows the buyer to pay the outstanding amount in multiple slices.

Similar to invoice, the instalment payment method relies on the shipment to determine the due dates of the different slices. You can use the deferred capture operation to let Unzer know when the shipment is ready. In case you like to reduce the amount, you can do this as part of the capture. The plugin will carry out corresponding cancel requests and send the delivery notification to Unzer.

Although it is possible to trigger the delivery notification, called finalize, in Unzer's Insights, we strongly recommend you to do it in the shop's backend.

In case you need to reduce the amount of the slices at a later point in time, you can do refunds.

5.6 Secured Invoice

The fundamental concept of invoice is that the goods are shipped before the buyer pays the outstanding amount. That implies that the buyer has a limited time to carry out the payment to the merchant's bank account.

This process has implications on to the shipment. In case the goods are not in stock, it is important not to capture the amount directly because with the capture the shipment notification is sent out and the due date is defined relatively to this point in time. In other words, you should configure the payment method to just authorize the payment and capture the

amount once the goods are ready to be shipped. This process is also recommended for other payment methods, if the goods are out of stock. In Unser Insights, the execution of the shipment notification is called finalize. The finalize operation is triggered with the capture. If only part of the amount is captured, the corresponding reduction will be applied automatically.

In case the buyer returns some of the items, you should create a refund. This does also work if the buyer has not yet paid the invoice. In this case, the outstanding amount will be reduced accordingly.

6 The Module in Action

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

6.1 Recommended Practice

Generally the most of the actions can be carried out from within the shop backend or from within the Unzer Insights. Not all actions that are triggered in Insights can be transferred correctly to the shop backend.

As such it is recommended to use the shop backend to carry out those actions (like refunds, cancels, captures etc.). This way both systems stay in sync.

6.1.1 Manual booking on "Unzer Invoice Secured"

In the case of the "Unzer Invoice Secured" payment method, please mind to manually capture the transaction. This would change the transaction process in such a way that you would not be able to cancel such a transaction afterwards.

6.2 Capturing / Cancelling of Orders

6.2.1 Magento 1

Please note:

The transaction management between your shop and Unzer is not synchronised. If you capture payments with Unzer, the status in the shop will not be updated and a second capturing in the shop is not possible.

6.2.1.1 Case 1: Invoice Capturing Directly After the Order

In the following, the process is explained for the case that you have chosen to directly create the invoice after having placed the order and only authorise payments - not capture them directly - (further information on the configuration can be found under [Creating the Invoice](#)).

In order to capture the order, open the invoice and click "capture". If you click "Cancel", the authorisation will be cancelled.

6.2.1.2 Case 2: Deferred Invoice Capturing

In case you have chosen the deferred invoice creation, you first have to create the invoice by clicking on the button "Invoice". Select "Capture online" below the total amount and then click on "capture invoice". The invoice has now been captured.

6.2.1.3 Cancel of orders/transactions

In order to cancel a transaction you first have to open the invoice and click on the cancel button. After that open the order and click on cancel here again. This will send the cancel of the order to Unzer. Please note that you need to cancel the invoice and the order.

6.2.2 Magento 2

6.2.2.1 Capture Bug in Magento (v. 2.0.0)

In version 2.0.0 of Magento there is a bug. It could be that invoices cannot be captured. Please make the following adjustments in the file `/vendor/magento/module-sales/Controller/Adminhtml/Order/Invoice/Capture.php`:

1. Delete the lines in the picture bellow which begin with a - .
2. Add the lines which has been marked with a + .

Here you can find the codes to be inserted in the form of a text:

```
+ )->addComment( __('The credit memo has been created automatically.'));
```

Method: execute()

Diff:

```

-         try {
-             $invoiceManagement = $this->_objectManager->get('Magento\Sales\Api\InvoiceManagementInterface');
-             $invoiceManagement->setCapture($invoice->getEntityId());
+             $invoice->capture();
+             $invoice->getOrder()->setIsInProgress(true);

```

Figure 6.1: Opening the Invoice

6.2.2.2 Performing Captures

Please note

The transaction management between Unzer and your shop isn't synchronized. When you capture the payments at Unzer , the status is not adjusted and a second capture isn't possible in your shop.

In the configuration of the payment method you can decide whether the invoice should be captured after having been created or if only the payment is authorized. You also decide if you already want to create an invoice. If you create an invoice you can't make any adjustments for the capture.

In order to capture invoices please take the following steps:

1. Open the order and create an invoice.

2. If you have set the Invoice Settlement to deferred you can still make adjustments to the invoice.
3. Click on Capture Online.

Invoice Settlement	Deferred settlement ▼	[WEBSITE]
	Choose settlement after order in case you want an invoice to be created with your order. The state of the invoice will set according to your capture status.	
Customer Address	No address is sent ▼	[STORE VIEW]
	Should the customer address be sent?	
Capturing	Deferred ▼	[STORE VIEW]
	Should the amount be captured automatically after the order (direct) or should the amount only be reserved (deferred)?	
Authorisation Method	Payment Page ▼	[STORE VIEW]
	Select the authorisation method to use in order to process this payment method.	
Alias Manager	Inactive ▼	[STORE VIEW]
	The alias manager allows the customer to select from a credit card previously stored.	

Figure 6.1: Capture options

6.2.2.3 Cancelling / Voiding Orders

In order to issue a cancellation of the payment you must use the "Void" button. If you wish to use the "Cancel" button you must cancel the payment in the Unser backend portal.

6.3 Refunds

6.3.1 Magento 1

You can refund already captured transactions and automatically transmit them to Unser. In order to do so, open the invoice of the captured order. By clicking on "Credit Memo" the window for refunds is opened. Enter the amount you wish to refund. By clicking on "Refund" the refund is transmitted to Unser.

Below you find a step-by-step guide including screenshots:

Order View
Order # 200000003 | 17.04.2014 16:40:42

[Back](#) [Edit](#) [Send Email](#) [Credit Memo](#) [Hold](#) [Ship](#) [Reorder](#)

Page 1 of 1 pages | View 20 per page | Total 1 records found
[Reset Filter](#) [Search](#)

Invoice #	Bill to Name	Invoice Date	Status	Betrag
200000003	Thomas Lueth	17.04.2014 16:41:41	Paid	20,99 €

Figure 6.1: 1. open the invoice

Invoice #10000026 | Paid | 23.04.2014 18:52:08 (the invoice email is not sent) Back Send Email Credit Memo Print

Order # 10000043 (the order confirmation email was sent)		Account Information	
Order Date	23.04.2014 18:51:23	Customer Name	Test Test
Order Status	Processing	Email	info@customweb.com
Purchased From	Main Website Main Store English	Customer Group	General

Figure 6.1: 2. click on credit memo - Important - open the invoice first!.

Refund Totals

Subtotal	156,00 €
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	161,00 €

Append Comments
 Email Copy of Credit Memo
Refund Offline Refund

Figure 6.1: 3. Adjust the refunding amount (see more info below [Refunds Based on Quantity](#))

Refund Totals

Subtotal	156,00 €
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	161,00 €

Append Comments
 Email Copy of Credit Memo
Refund Offline Refund

Figure 6.1: 4. To process the refund click on Refund.

✓ The credit memo has been created.

Order # 10000041 | 23.04.2014 18:26:16 Back Send Email Reorder

Order # 10000041 (the order confirmation email was sent)		Account Information	
Order Date	23.04.2014 18:26:16	Customer Name	Test Test
Order Status	Closed	Email	info@customweb.com
Purchased From	Main Website Main Store English	Customer Group	General
Placed from IP	160.85.155.47		

Figure 6.1: Wait for the confirmation of the refund.

6.3.1.1 Refunds Based on Quantity

You can make refunds based on product quantity. In order to do so, open the credit memo window and enter the amount of products you wish to refund to your customer's card

You can carry out as many individual refunds as you wish until you have reached the quantity of the original order. The status of the order then automatically switches to **complete**.

Order # 20000055 | 02.12.2013 16:37:59

Back Edit Send Email Credit Memo Hold Ship Reorder

Page 1 of 1 pages | View 20 per page | Total 2 records found

Credit Memo #	Bill to Name	Created At	Status	Refunded
200000001	Leandra Simitovic	02.12.2013 16:42:10	Refunded	35,00 €
200000002	Leandra Simitovic	02.12.2013 16:47:03	Refunded	146,00 €

Figure 6.1: Overview of all Refunds

6.3.1.2 Refunding of Any Amount

As each position of the order needs to be transmitted to Unser we can't support the function **Adjustment Refund** - meaning the refund of any amount. Only whole items can be refunded by adjusting the refund amount.

Adjusting the amount of several refunds

It is possible to carry out several refunds on an order. Please note that you can refund a maximum of 100% of the original amount. If you have already carried out a refund you need to make sure not to refund more than the initial amount by adjusting the amount and the Adjustment Fee.

6.3.2 Magento 2

6.3.2.1 Resolving a Current Magento Bug (v. 2.0.0)

In the 2.x version of Magento there is a bug. Please make the following adjustments to the file `/vendor/magento/module-sales/Model/Order/Payment.php` :

1. Delete the lines in the picture bellow which begin with a - .
2. Add the lines which has been marked with a + .

Method: `registerRefundNotification($amount)`

Diff:

```

$creditmemo->setPaymentRefundDisallowed(
    true
)->setAutomaticallyCreated(
    true
-   )->register()->addComment(
+   )->addComment(
+       __('The credit memo has been created automatically.');
```

Figure 6.1: Adjustments so you are able to enter a credit memo.

Here you can find the codes to be inserted in the form of a text:

`+)->addComment(__('The credit memo has been created automatically.'));`

6.3.2.2 Performing Credits

For registered transactions you can create credits and transmit them automatically to Unzer . In order to do so open an invoice of an already registered order. By clicking on "Credit Memo" a dialog will open for the refunds. Now you can adjust the number of products which you would like to credit in the credit memo dialogue.

Here you can find each step again including screenshots:

#000000003 🔍 🔔 👤 admin ▾

← Back Send Email Credit Memo Hold Ship

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

🔍
 🔼 Filters
👁 Default View ▾
⚙ Columns ▾
📄 Export ▾

Select It... ▾
1 records found
20 ▾ per page
< 1 of 1 >

	Invoice ↓	Invoice Date	Order Number	Order Date	Bill-to Name	State	Amount	Action
<input type="checkbox"/>	000000003	Dec 14, 2015 7:55:37 AM	000000003	Dec 14, 2015 7:54:41 AM	Test Customweb	Paid	CHF39.00	View

Figure 6.1: 1. Opening the Invoice

New Memo for #000000003

[🔍](#)
[🔔](#)
[👤 admin ▾](#)

[← Back](#)
[Reset](#)

Order & Account Information

Order # 000000003 (The order confirmation email was sent)

Order Date	Dec 14, 2015, 7:54:41 AM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	212.90.201.186

Account Information

Customer Name	Guest
Email	info@customweb.com
Customer Group	NOT LOGGED IN

Address Information

Billing Address [Edit](#)

Test Customweb
 Teststrasse 2
 Zürich, Zug, 8032
 Switzerland
 T: 555466684

Delivery address [Edit](#)

Test Customweb
 Teststrasse 2
 Zürich, Zug, 8032
 Switzerland
 T: 555466684

Figure 6.1: 2. Click on Credit Memo - Important the invoice needs to be opened first.

Refund Totals

	Subtotal	156,00 €
	Refund Shipping	<input type="text" value="5"/>
	Adjustment Refund	<input type="text" value="0"/>
	Adjustment Fee	<input type="text" value="0"/>
	Grand Total	161,00 €

Append Comments
 Email Copy of Credit Memo

Figure 6.1: 3. Choose which products you would like to credit and click on Refund Online.

#000000003

🔍 🔔 👤 admin ▾

← Back Send Email Credit Memo Hold Ship

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Order History

Transactions

🔍

Select It... ▾
0 records found
20 ▾ per page
<
1
of 1
>

	Credit Memo	Created	Order	Order Date	Bill-to Name	State	Refunded	Action
We couldn't find any records.								

Figure 6.1: Overview of all the credits made

Adjusting the amounts for several refunds

It is possible to issue several credits on one order. Please note that you can't credit more than 100% of the original amount. If you have already issued a credit you will need to make sure you don't credit more than the original amount, by adjusting the amount and the Adjustment Fee.

6.4 Useful Transaction Information on the Order

6.4.1 Magento 1

In each order, processed via our module, you can find an overview of the most important information about the transaction as well as a transaction history.

Payment Information		
Authorisation amount	161.0000	
Currency	CHF	
Payment method	MasterCard	
Payment ID	23679571	
Captured amount	161	
Transaction authorised	Yes	
Transaction uncertain 	No	
Transaction captured	Yes	
Transaction paid	Yes	
Alias	XXXXXXXXXXXX0007 (12/13)	
Alias Token	8B1974E9-59EB-442C-A1D4-34BEC568EE23	
Acceptance	test123	
Card number	XXXXXXXXXXXX0007	
Card expiry date	12/13	
Merchant reference	sellxed_og_100000087	
Transaction history		
Date	Action	Message
2013-09-12 12:53:50	authorization	The amount of 161.00 is authorized.
2013-09-12 12:53:50	capturing	The amount of 161.00 is captured.
Order was placed using CHF		

Figure 6.1: Transaction Information.

6.4.2 Magento 2

In each order, which was processed by our module, you will find an overview of the most important information on the transaction and transaction history.

Payment & Shipping Method

Payment information



Visa

Transaction ID	14
Authorisation Amount	107
Currency	CHF
Payment period	Visa
Payment ID	h1ElhGAKOSCitASfe0IibOShndA
Test Transaction ?	Yes
Transaction authorised	Yes
Transaction uncertain ?	No
Transaction paid	Yes
Card Type	Saferpay Test Card
Effective Payment Method Name ?	SaferpayTestCard
Authorisation Method	PaymentPage
3D Secure	Successful

Shipping & Handling Information

Flat Rate - Fixed CHF10.00

Dec 14, 2015 11:08:14 AM | Authorization
 The amount of 107.00 is authorized. (Customer successfully returned from the Saferpay payment page.)

The order was placed using CHF.

Figure 6.1: Transaction Information.

6.5 Using Invoice Details of a Processor

6.5.1 Magento 1

In the following context you can view or embed the "payment details" of for example an "Open Invoice" transaction:

6.5.1.1 Magento Order Confirmation (E-Mail)

The "payment information" will be visible in the default "order confirmation e-mail" of Magento.

6.5.2.3 Magento-Backend (Transaction details)

You can view the payment and transaction details in Magento under **Sales > Orders**.

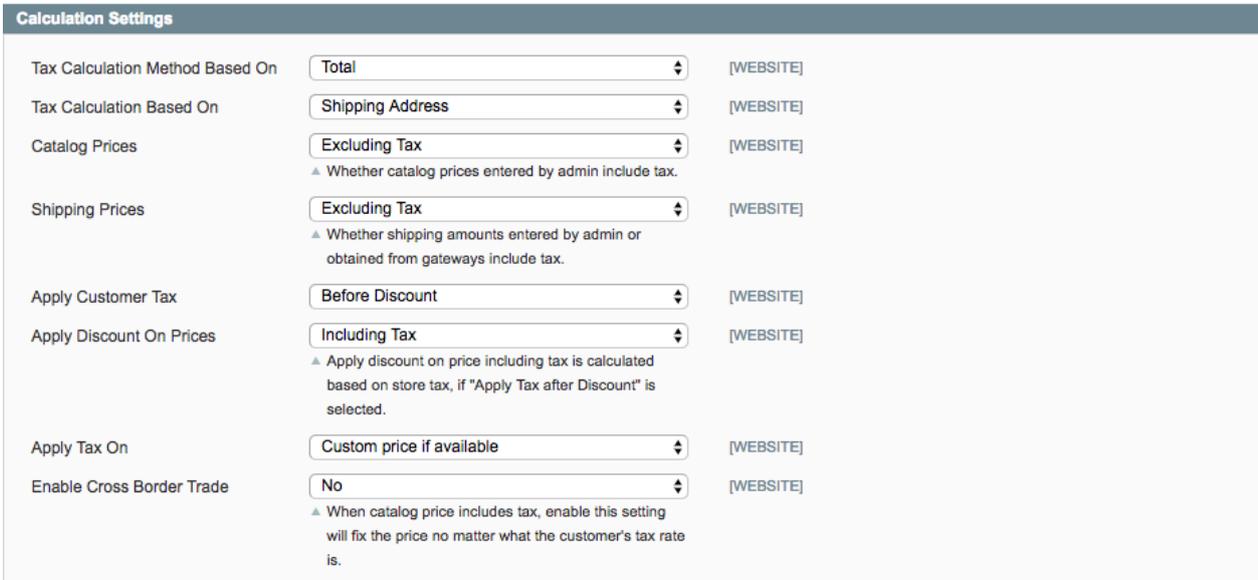
6.5.2.4 Magento Success-Page

Due to technical limitations, it is currently not possible to display the "payment information" here.

6.6 Tax Calculation Settings

6.6.1 Magento 1

To ensure that the taxes are calculated correctly and transmitted correctly to a third party invoice provider inside Magento please make sure that you set the calculation settings in the menu under System > Configuration > Tax as showed in the screenshot below.



The screenshot shows the 'Calculation Settings' section in the Magento 1 admin interface. It contains several configuration options, each with a dropdown menu and a '[WEBSITE]' link. The settings are as follows:

Setting Name	Value	Link
Tax Calculation Method Based On	Total	[WEBSITE]
Tax Calculation Based On	Shipping Address	[WEBSITE]
Catalog Prices	Excluding Tax	[WEBSITE]
<small>▲ Whether catalog prices entered by admin include tax.</small>		
Shipping Prices	Excluding Tax	[WEBSITE]
<small>▲ Whether shipping amounts entered by admin or obtained from gateways include tax.</small>		
Apply Customer Tax	Before Discount	[WEBSITE]
Apply Discount On Prices	Including Tax	[WEBSITE]
<small>▲ Apply discount on price including tax is calculated based on store tax, if "Apply Tax after Discount" is selected.</small>		
Apply Tax On	Custom price if available	[WEBSITE]
Enable Cross Border Trade	No	[WEBSITE]
<small>▲ When catalog price includes tax, enable this setting will fix the price no matter what the customer's tax rate is.</small>		

Figure 6.1: Recommended tax calculation settings for Magento.

Please also make sure that inside the settings of your promotion in the tab "Actions" the discount is not applied to the shipping amount as Magento is not correctly transmitting the tax rate there.

6.7 OneStepCheckout

6.7.1 Magento 1

The checkout of Magento can be modified and reduced to one step. The so called OnePageCheckout. Our modules support the most important OnePageCheckout extensions. If you are thinking of using a OneStepCheckout extension in combination with our Unser Magento, please make sure that you are using one of the following:

- OneStepCheckout by www.onestepcheckout.com

- OneStepCheckout by [Ahead Works](#)
- LightCheckout by [GoMage](#)
- Firecheckout by [Templates Master](#)

6.7.2 Magento 2

There is no official support for any OnePageCheckout module for Magento 2.

6.8 Setup a Cron Job to Activate the Timed Operations

6.8.1 Magento 1

To activate the timed operations of the plugin (e.g. update service, deleting pending orders, etc.) make sure that you set up the Magento Cron engine. Especially the update function allows you to automatically retrieve additional information or changes of your order directly via the API of Unzer. Please note it could be that in order to use the update feature it may be necessary that Unzer activates additional options in your account.

The module uses the standard cron engine of Magento. More information regarding the set up can be found [here](#).

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

6.8.2 Magento 2

The module uses the standard cron engine of Magento 2. More information regarding the set up can be found [here](#).

6.9 Magento 1 API Manual

Via API, our module provides plenty of information on a transaction. The following section describes which calls are possible and what information is provided.

6.9.1 General Information on Using the API

General information on using the Magento SOAP API can be found here: <http://www.magentocommerce.com/api/soap/introduction.html>

6.9.2 API Calls

This overview shows the API Versions and which API Calls they support.

6.9.2.1 API V1

- `$client->call($session, 'unzercw_transaction.list');` //List of all transactions

- `$client->call($session, 'unzercw_transaction.info', {transactionsId}); // Single Transaction`

6.9.2.2 API V2

- `$client->unzercwTransactionList($session); //List of all transactions`
- `$client->unzercwTransactionInfo($session, {transactionsId}); //Single Transaction`

6.9.2.3 XML-RPC

- `$client->call('call', array($session, 'unzercw_transaction.list')); //List of all transactions`
- `$client->call('call', array($session, 'unzercw_transaction.info', {transactionsId})); //Single Transaction`

6.9.2.4 REST

- `$this->callApi('unzercw/transactions'); //List of all transactions`
- `$this->callApi('unzercw/transactions/{transactionsId}'); //Single Transaction`

6.10 Partial Cancel

If you set the checkbox "close transaction for further captures" then the rest amount which has not been captured will be cancelled.

If you want to initiate a partial cancellation on an authorize transaction and allow further captures to be made, you must initiate the partial cancel from the Unzer backend.

The transaction allows only refunds when the transaction has been closed for further captures.

7 Testing

Before switching from test to live mode it is important that you test the module extensively.

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:

Credit / Debit Card

Card number	4711 1000 0000 0000	Visa Success
Expiry Date	12/2030	
CVC	123	
3D PW	secret!33	

Card number	5453 0100 0005 9543	Mastercard Success
Expiry Date	12/2030	
CVC	123	
3D PW	secret3	

WeChat Pay

Username	keychain
Password	123

Alipay

Username	keychain
Password	123

EPS

Bank / Issuer	Stuzza Bank	EPS Simulation
Username	1003993	
Password	rX/'PvZzIW?&	

iDEAL

Account Bankname	ING_TEST
------------------	----------

giropay

Bank number	12345679
Account number	0000000300
IBAN	DE46940594210000012345
BIC	TESTDETT421
User	chiptanscatest2
User PIN	12345

User TAN	123456
TAN mechanism	optical Chip-TAN

SOFORT

Bank number	00000
Account number	123456
User PIN	123456
User TAN	12345

8 Errors and their Solutions

8.1 Module is not shown

If the module is not shown even though the files have been downloaded onto the server correctly, please check the following:

- The local.xml can be found in the /app/etc directory
- Make sure `disable_local_modules` is set to `,false'`

8.2 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Unzer 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 Magento 1

9.1.1 Fees and discounts within Magento

To configure a Unzer payment gateway based fee and discount, you will need the following 3rd-Party plugin.

- [Fooman Surcharge](#)

9.2 Birthday and gender in Magento 1

For certain payment service providers it is necessary to check the birthday an the gender of a customer. Magento 1 does not check this by default. this check can be enabled under "Go to System > Configuration | Customers > Customer Configuration > Name and Address Options".

9.3 Birthday and gender in Magento 2

For certain payment service providers it is necessary to check the birthday an the gender of a customer. Magento 2 does not check this by default. this check can be enabled under "Stores > Configuration | Customers > Customer Configuration > Name and Address Options".

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 Unzer settings. The store log setting does not affect these log messages.

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

10.2 Log Location

The log file is stored in the Magento log directory. (Default Path: {shopRootDirectory}/var/log)

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.

11.1.1 Magento 1

Initialize the shops core functions.

```
define('MAGENTO_ROOT', getcwd());
$mageFilename = MAGENTO_ROOT . '/app/Mage.php';
require_once $mageFilename;
Mage::setIsDeveloperMode(true);
ini_set('display_errors', 1);
umask(0);
Mage::app();
```

Now you can load the transaction and then extract the transactionObject.

Load the transaction object by Id:

```
$dbtransaction = Mage::getModel('unzer/w/transaction')->load($transactionId);
$transactionObject = $dbtransaction->getTransactionObject();
```

Load the transaction object by Order Number:

```
$dbtransaction = Mage::getModel('unzer/w/transaction')->load($orderId, 'transaction_external_id');
$transactionObject = $dbtransaction->getTransactionObject();
```

11.1.2 Magento 2

Initialize the shops core functions.

```
use Magento\Framework\App\Bootstrap;
require __DIR__ . '/app/bootstrap.php';
$bootstrap = Bootstrap::create(BP, $_SERVER);
$obj = $bootstrap->getObjectManager();
```

```
$state = $obj->get('Magento\Framework\App\State');  
$state->setAreaCode('frontend');
```

Get the transaction factory.

```
$factory = $obj->get  
( 'Customweb\UnzerCw\Model\Authorization\TransactionFactory' )->create();
```

Now you can load the transaction and then extract the transactionObject.

Load the transaction object by Id:

```
$dbTransaction = $factory->load($transactionId, 'entity_id');  
$transactionObject = $dbTransaction->getTransactionObject();
```

Load the transaction object by Order Number:

```
$dbTransaction = $factory->load($orderId, 'order_id');  
$transactionObject = $dbTransaction->getTransactionObject();
```

Load the transaction object by Payment Id:

```
$dbTransaction = $factory->load($paymentId, 'payment_id');  
$transactionObject = $dbTransaction->getTransactionObject();
```