Installation Manual for Availabill e-Commerce

This manual describes the installation and usage of the Availabill extension for e-Commerce.

Release Date: Mon, 07 Aug 2023 14:01:06 +0200
Version: 3.0.37

wallee AG
General-Guisan-Strasse 47
CH-8400 Winterthur

E-Mail: info@sellxed.com

Telefon:
CH: +41 (0)44 505 13 60
DE: +49 (0)40 2999 60117
UK: +44 (0)161 850 6890
US: +1 (0)205 557 5869

© copyright by wallee AG Mon, 07 Aug 2023 14:01:06 +0200
####conditional####

Table of Contents

1 Introduction 5

1.1 Installation Process 5

2 Availabill Backend Configuration 6

2.1 Backend Access Availabill 6
2.1.1 Live Backend 6
2.1.2 Test Backend 6

2.2 Configuration of the Main Module 7

2.3 Payment Method Configuration 7
2.3.1 Activation of the payment method depending on the invoice delivery 7
2.3.2 Payment Method Configuration / Scoring 7

2.4 Activating and testing your Account 7

3 Module Installation and Update in the e-Commerce Shop 8

3.1 Installation 8

3.2 Updates and Upgrades 8
3.2.1 Update Checklist 8
3.2.2 Update Instructions 9

4 Module Configuration in the e-Commerce Shop 10

4.1 Basic Module Configuration 10

4.2 Payment Method Configuration 10

4.3 Direct Capturing of Transactions 11

4.4 Uncertain Status 11
4.4.1 Setting the order state 11

4.5 Optional: Validation 11

5 Settings / Configuration of Payment Methods 12

5.1 General Information About the Payment Methods 12

5.2 Information on Payment Status 12
5.2.1 Order status "pending" / imminent payment (or similar) 12
5.2.2 Order status "cancelled" 12

6 The Module in Action 13

6.1 Useful Information on Transactions 13

6.2 Capture / Cancel Orders 13
6.2.1 Capturing and Cancelling Orders 14

6.3 Order Refunds 14
6.4 Transaction History 15
6.5 Cron Job Setup 16

7 Testing 17

7.1 Test Data 17
7.1.1 Invoice 17

8 Errors and their Solutions 18

8.1 The Referrer URL appears in my Analytics Tool 18

9 Error Logging 19

9.1 Log Levels 19
9.2 Log Location 19

10 Advanced Information 20

10.1 Transaction Object 20

1 Introduction

This manual describes how to install, configure and use the payment module for e-Commerce and Availabill.

Before getting started, make sure to have all necessary information at hand. You will need:

- The Availabill Webshop ID
- Availabill Username
- Availabill Password
- e-Commerce payment module from sellxed.com/shop
- Login data to your server and shop

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

1.1 Installation Process

This document contains all information you will need in order to install the module. It is essential to follow the steps described in this manual strictly. This ensures the safe use of the module in compliance with all security regulations.

1. Configuration of the Main Module
2. Configuration of the accepted payment methods and authorization methods
3. Performing a test order
4. Switch the operation mode to Live

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 information 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

2 Availabill Backend Configuration

2.1 Backend Access Availabill

In the Accarda Backend you are able to view / administer all transaction request sent to Availabill

2.1.1 Live Backend

An overview of all transactions and settings can be found in the Availabill backend. You can access the backend under: https://kargui.availabill.ch/karGui/login

2.1.2 Test Backend

In order to access the test backend use this url: https://karguitest.availabill.ch/karGui/login/

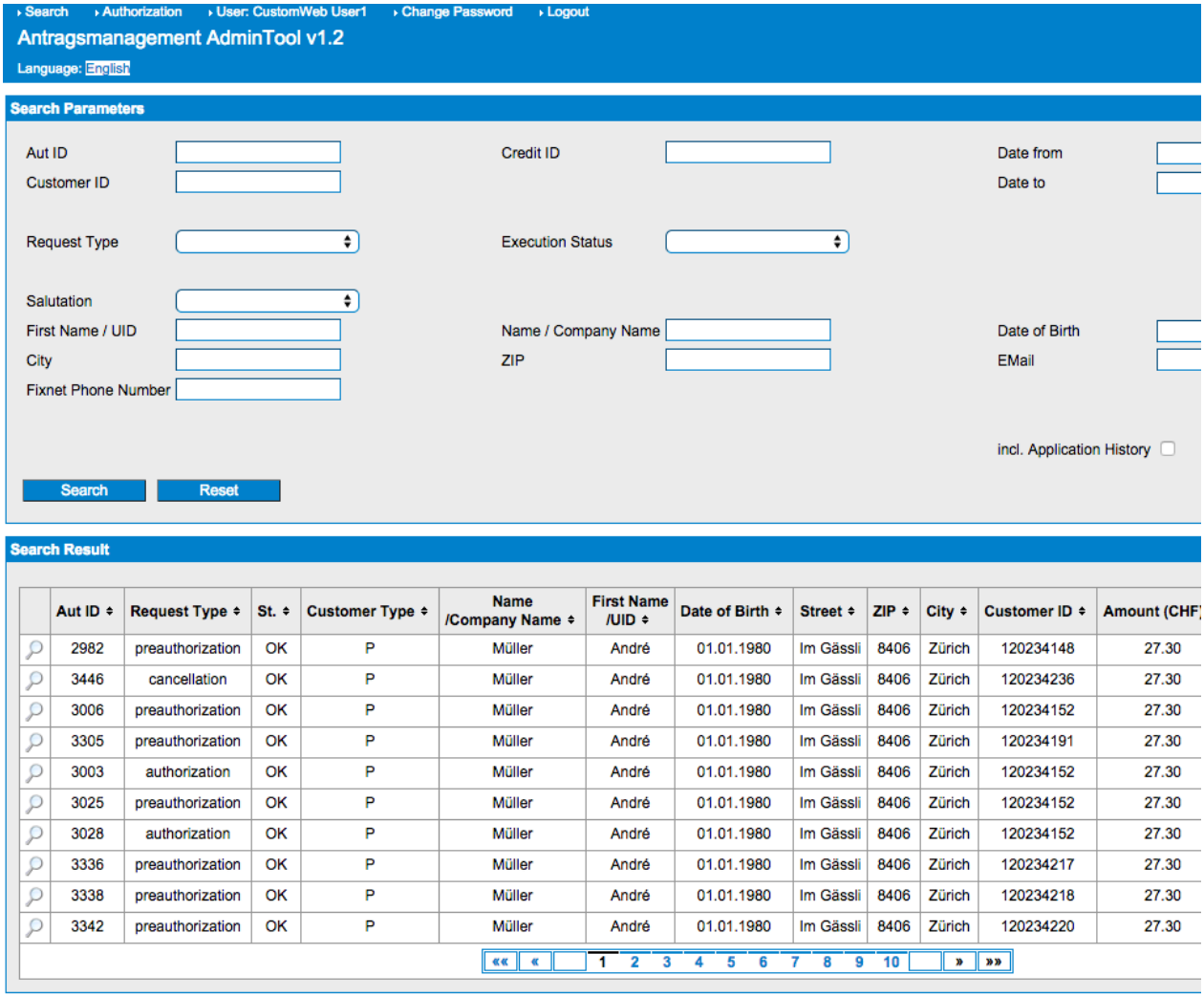

Figure 2.1: You can access and manage the payments in the backend.

2.2 Configuration of the Main Module

In order to configure the main module, copy the WebshopID, username and password in the according field in the configuration of the Main Module.

2.3 Payment Method Configuration

2.3.1 Activation of the payment method depending on the invoice delivery

After the installation of the module you should find 4 new payment methods in your shop. The different method depend on the delivery method of the invoice (email / postal). Activate the payment method which corresponds the agreement with Availabill.

2.3.2 Payment Method Configuration / Scoring

You are able to configure independently for B2C and B2B customers when the validation / scoring should take place. We distinguish between three different events when the scoring can take place:

- During the validation: The validation takes place as soon as the payment is finalized. The payment method will always be displayed.
- After the selection of the payment method: The scoring takes place after the selection of the payment method in the shop.
- Prevalidation - before the payment method is displayed: The payment method is only shown if the scoring result is positive.

Configure the scoring according your agreement with Availabill.

Further information on the payment method configuration and the implementations of the settings can be foundhere. After activating and configuring the payment method you need to conduct a test order with the test data from this manual.

2.4 Activating and testing your Account

After activating and configuring the payment method you need to conduct a test order with the test data from this manual.

After successfully completing the tests, switch the operation modus to Live. Now you are able to process payments.

3 Module Installation and Update in the e-Commerce 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 install 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 shop 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 that is 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 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. 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. 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.

4 Module Configuration in the e-Commerce 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 Basic Module Configuration

Activate the plugin by selecting the module E-commerce Availabill in the **Plugin** menu.

The settings for the basic module can be found at **Availabill > Availabill** . Fill out the fields, you should have already entered the necessary data in the Availabill backend or you received it as part of your correspondence with Availabill. Each option is explained in more detail in a short info text in the shop.

4.2 Payment Method Configuration

After the basic module has been configured successfully, you can proceed to the payment settings. The payment methods you want to accept in your shop can be adjusted at **Settings > Store > Payments** . Every payment method is listed individually. Activate the payment methods you would like to provide in your shop by ticking the corresponding boxes on the right side. Individual changes can be made for each payment method to adjust it to your processes.

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 Availabill and the module
>
> It may be that settings saved in the payment modules overwrite settings saved in Availabill.

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

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

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 of the most important features in the daily usage of the Availabill module.

6.1 Useful Information on Transactions

For each order processed with our module you can access an overview of the most important transaction information. Among other things, this allows you to identify each corresponding order to each transaction displayed in the backend.

You can find the orders at Dashboard > Store Sales.

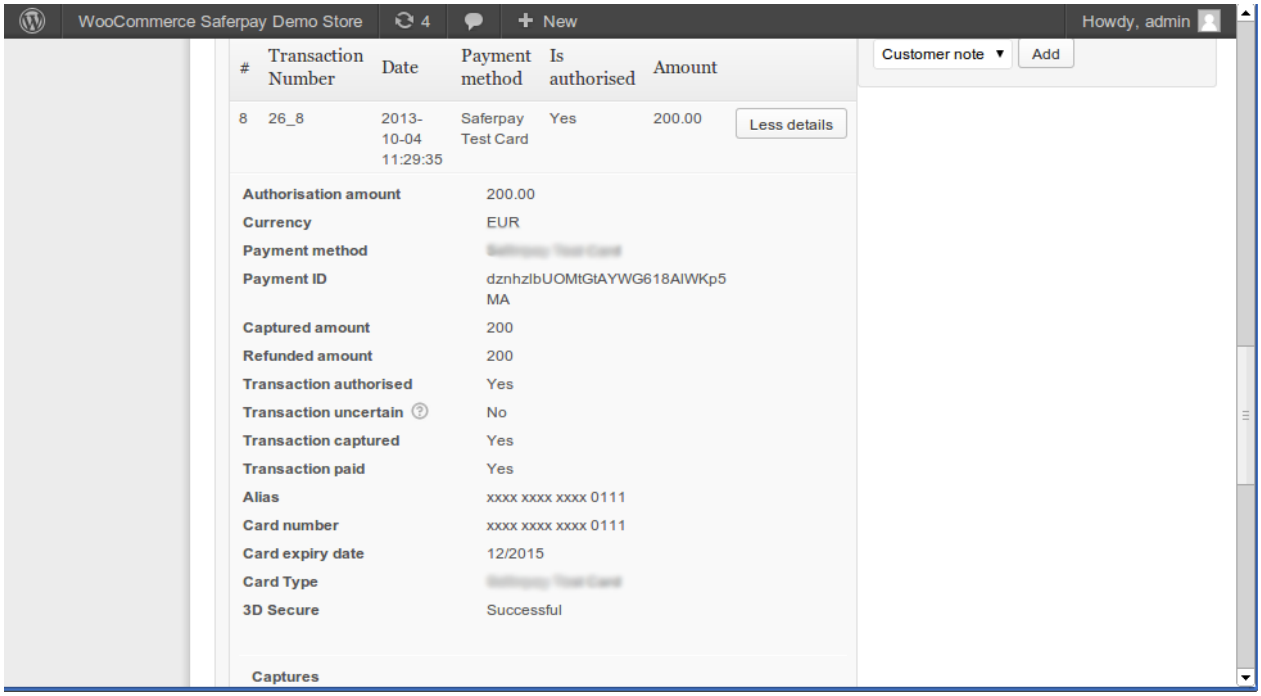

Figure 6.1: Transaction information in WordPress E-Commerce.

6.2 Capture / Cancel Orders

6.2.1 Capturing and Cancelling Orders

In order to capture orders, open the order first (Dashboard > Store Sales) and then open the transaction information. Enter the amount you want to capture into the input field. By clicking on Capture the card is charged directly.

An order can be **cancelled** by clicking "Cancel Transaction" and the transaction as well as the reserved amount is released on the customer's card immediately.

Capturing Orders in the Availabill Backend

The transaction management between Availabill and your shop is not synchronised. When capturing payments in the Availabill, the status is not adjusted in the shop and a second capture is not possible.

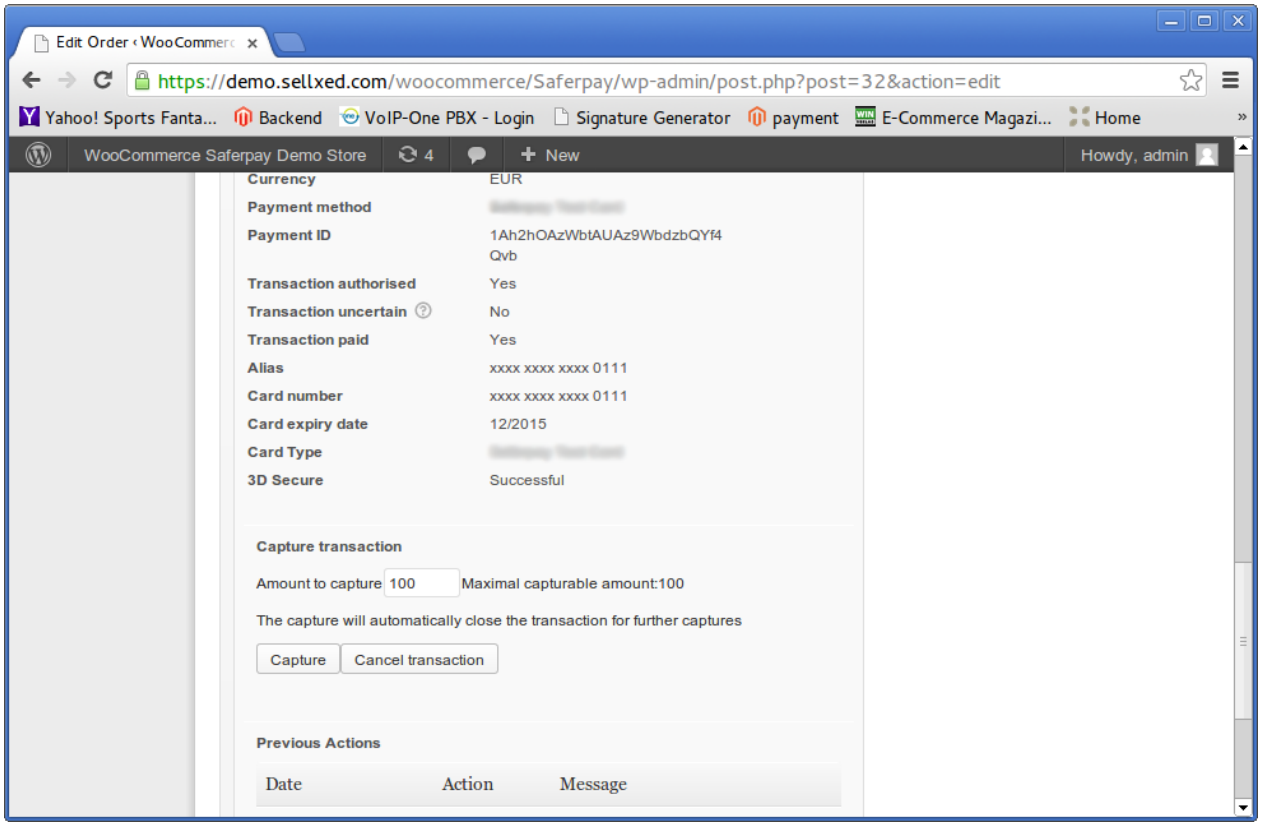

Figure 6.1: Cancelling and capturing orders

Partial Capturing

Please inquire, whether multiple captures are supported within your Availabill contract. Otherwise, partially captured transactions could be blocked from future captures.

6.3 Order Refunds

In order to refund an order, open the transaction information (see above).

You can refund individual items or an arbitrary amount by adjusting the total amount or the number of items.

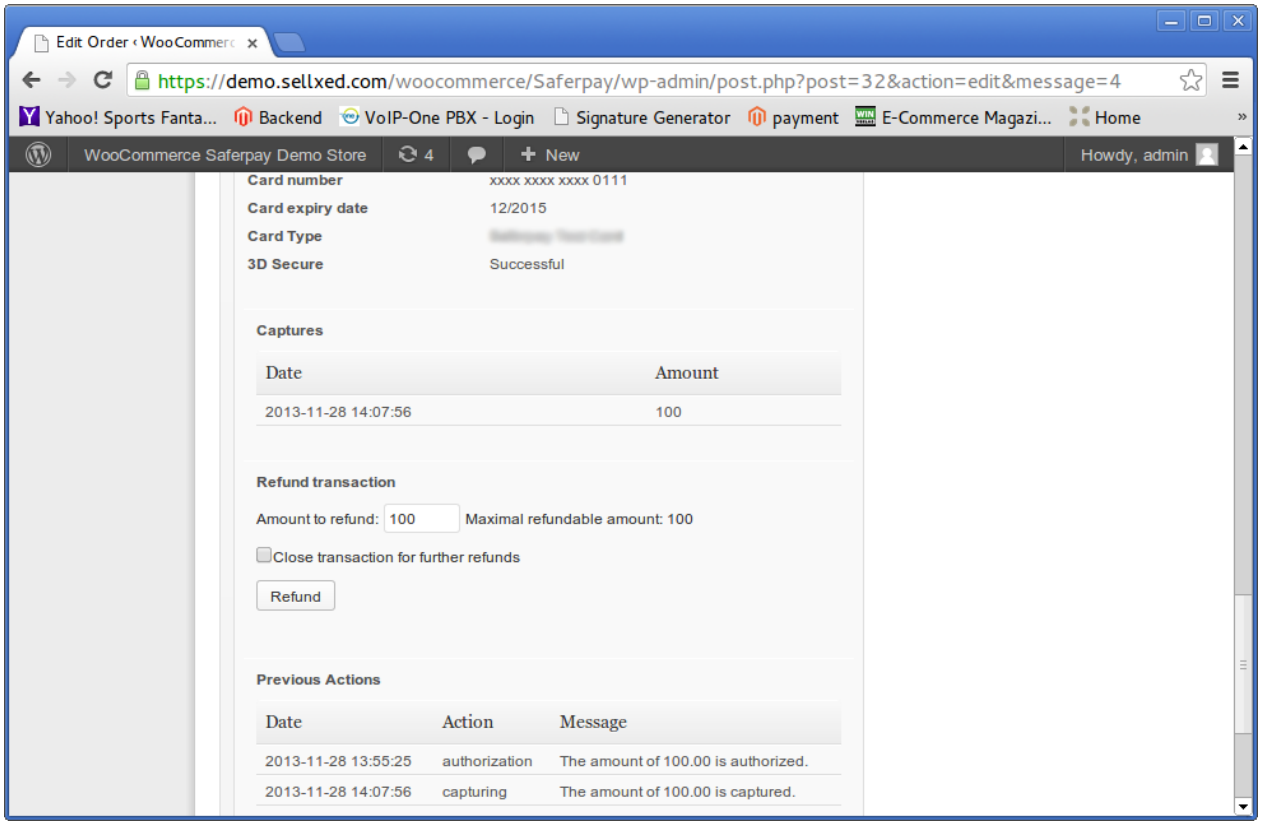

Figure 6.1: Refunds in WooCommerce for Availabill.

> ### Maximum Refund
>
> Our module restricts the refund amount to 100% of the originally authorised amount.

6.4 Transaction History

Every action within the transaction management is processed through the module. Information on each transaction can be viewed in the corresponding order.

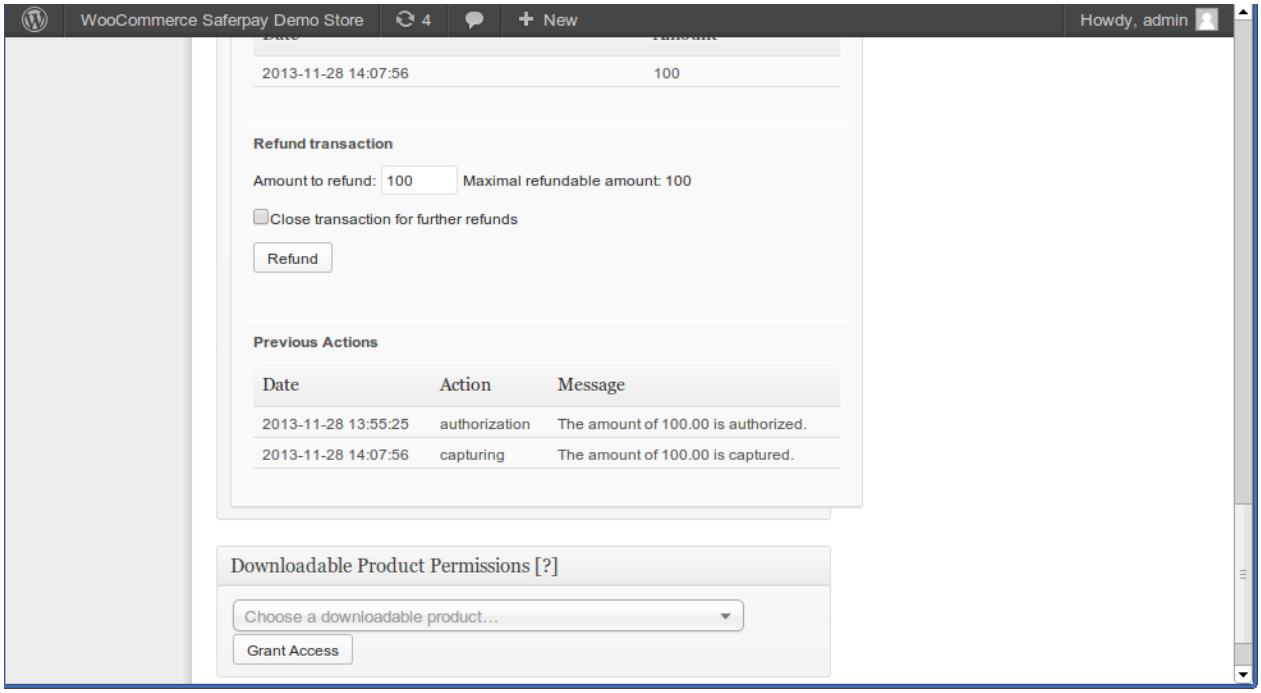

Figure 6.1: Transaction overview in the transaction history.

6.5 Cron Job Setup

In order to activate the time-controlled plugin functions (e.g. update service, deleting pending orders etc.) you have to set up cron jobs in e-Commerce. The update function is especially relevant - it allows you to fetch subsequent transaction changes at Availabill via the API. Please keep in mind that additional options might have to be activated.

The module uses the default e-Commerce cron. Information on the setup can be found here.

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:

7.1.1 Invoice

The age of the customer must be over 20 years. The surname of the customer is used to influence the outcome of the test purchase. It is comprised of the original name and two modifiers:

[Name] [Modifier_Invoice] [Modifier_Installments]

There are 3 results which can be triggered:

- OK: The order is accepted
- NOK: The order is not accepted
- NV: Needs Verification - A mobile confirmation is required

If the original name was "Hans Müller" it could be changed to: "Hans Müller OK NOK" which would mean that invoices are accepted but the installments is declined.

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 Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Availabill 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 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.

9.1 Log Levels

You can configure the log level in the Availabill settings.

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

9.2 Log Location

The log file is stored in the logs folder of this plugin **wp-content/plugins/plugins /ecommerce_accardacw/logs**. Please make sure the path exists and it is writable by the webserver.

10 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.

10.1 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 Wordpress initialized in your script, this is required for the database connection.

```
require_once( dirname(__FILE__) . '/wp-load.php' );
```

Include the modules Util class.

```
require_once ABSPATH.'wp-content/plugins/ecommerce_accardacw/classes
/AccardaCw/Util.php';
```

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

```
$transactionById = AccardaCw_Util::getTransactionById($transactionId);
$transactionObject = $transactionById->getTransactionObject();
```

Load the transaction by the external Id:

```
$transactionByExternal = AccardaCw_Util::getTransactionByExternalId
($externalId);
$transactionObject = $transactionByExternal->getTransactionObject();
```

Load transactions by the order id:

```
$transactionsByOrder = AccardaCw_Util::getTransactionsByOrderId($orderId);
foreach($transactionsByOrder as $transaction){
    $transactionObject = $transaction->getTransactionObject();
    //Do something with each object
}
```