Installation Manual for DocData OXID

This manual describes the installation and usage of the DocData extension for OXID.

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1 Introduction

This manual describes the installation, the configuration and the usage of the payment module for OXID and DocData.

Before you can start with the installation please make sure that you hold all the necessary data. You need:

- DocData Merchant Name
- DocData Merchant Password
- OXID 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 Procedure of the installation

With this document you'll get all the information you need for the installation of the module. For the implementation of the module you should follow the checklist strickly. Only like that you can ensure a safe usage in accordance to all security regulations.

1. Configuration of the DocData Settings
2. Configuration of the main module
3. Configuration of all the accepted Payment method with the authorization methods included
4. Process a test order
5. Activation of yourDocData 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 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

.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 DocData might not get through to the shop.

1.2   System Requirements

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

- PHP Version: 5.4.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 DocData - Backend

You'll find an overview about transactions and settings in the backend from DocData:

- Test environment: https://test.docdatapayments.com/ps/com.tripledeal. paymentservice.backoffice.Login
- Live environment: https://backoffice.docdatapayments.com/ps/com. tripledeal.paymentservice.backoffice.Login

2.1   Configuration of the main module

Fill the merchant name and merchant password in the main configuration of the module. You can there additionally choose a default. The default CSS matches the deposited standard CSS configuration in DocData. You can overwrite these setiings in the configuration of the payment method.

Choose if you want to process the payments in live or test mode.

2.2   Configuration of the payment methods

You can undertake various adjustments for each payment method.

Please keep in mind that in case you want to use the Payment Method Bank Transfer or Open Invoice (Klarna and AfterPay) you need to activate the feature extendedStatusRequests at DocData.

2.2.1   CSS ID

Define for each payment method your CSS ID, which you have already set in the backend of DocData. You can define the CSS profile under **Settings > Edit Look and Feel**
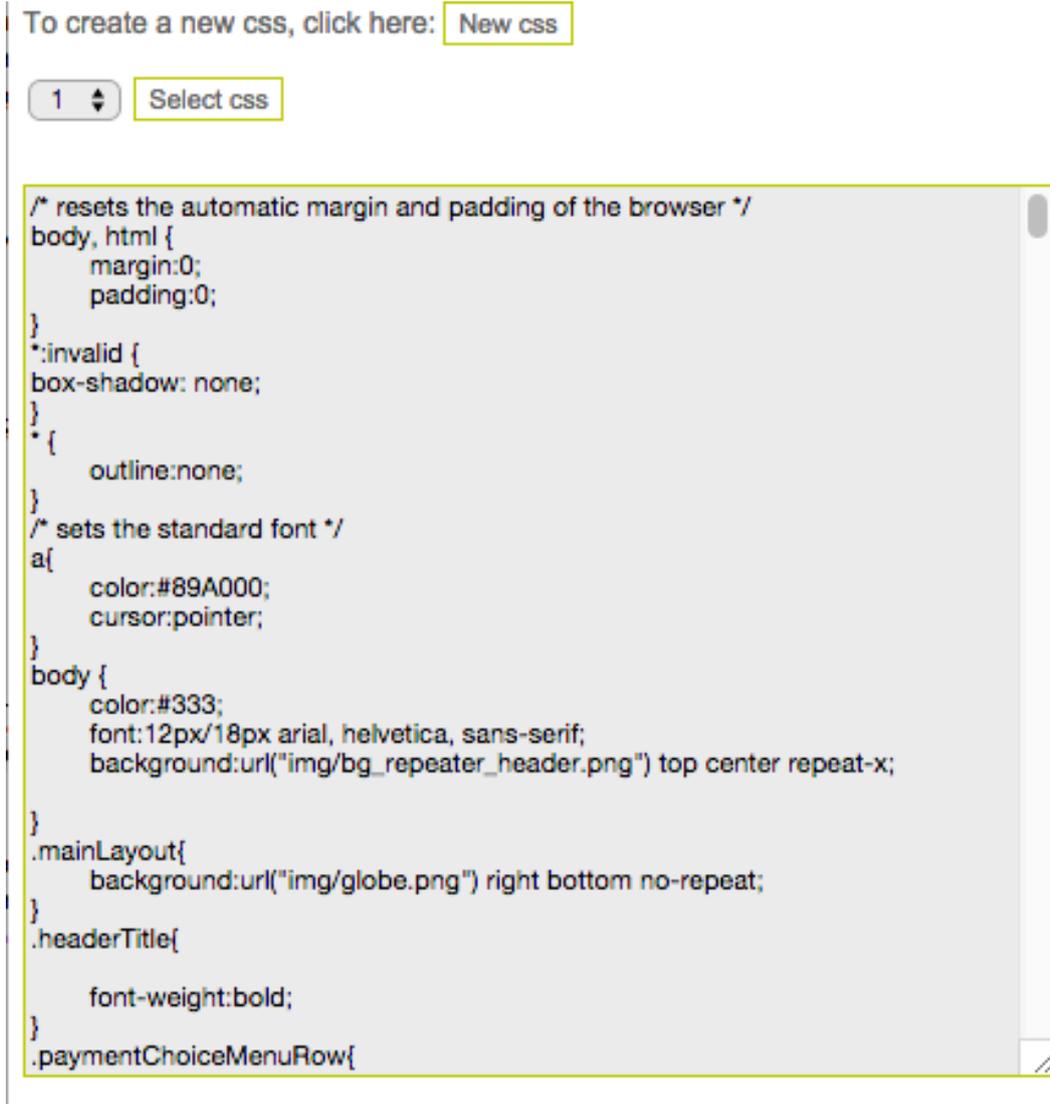
Figure 2.1: Create CSS profiles under settings > Edit Look and Feel.

2.2.2 Payment Profile

With the payment profile you can select a payment method for the payment page. To do so you need to create a profile for each payment method in the backend of DocData.

Under **Edit > Payment method and names** you can create profiles and assign to every profile a payment method. Fill in the name of the profile into the configuration of the payment method. This results in the pre selected display of this payment method.

Figure 2.1: Creation of payment profiles to select the payment method under Edit > Payment method and names.

You'll find more information to the configuration of the payment methods and the significance of the particular settingshere.

2.3 Activation of the Cron Jobs

Since the DocData doesn't send notification answers it can happen that the customer closes the window before finishing the transaction. In this case we recommend to install Cron Jobs in your shop. Further information you'll find in the chapterCron Job

2.4 Testing and Activation of the Module

After the activation and configuration of the payment methods, test your module with the test datayou find in the manual. If the tests were successful, switch to **Live** in your main module.

3   Module Installation and Update in the OXID 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 OXID Shop

The configuration consists of two steps. The first step is the configuration of the main module with all the basic settings (cf. <u>Configuration of the Main Module</u>). During the second step you can then carry out individual configurations for each <u>payment method</u> . 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

The settings for the main module can be found under **Extensions > Module** . Install the module by clicking **Activate**.

By clicking on the tab **Settings** you get to the configuration of the main module. Fill in the boxes by using the data that you have received from DocData and may have already saved in the backend of DocData. Each option is additionally explained in a short info text in the shop.

4.1.1 Settings

4.1.1.1 Update interval for payments

Payments may be updated periodically (interval in minutes). To use this feature you have to setup a cron job.

4.1.1.2 Order Creation

Choose when the order should be created. If set to 'Before Payment', orders are created in any case. If set to 'After Payment', an order is created only if the payment is successful.

4.1.1.3 Order ID

Use this setting to enforce the behaviour of unique order IDs, even if they are not.

> ## Changing Order Creation and Order ID Settings
>
> Changing these settings may cause duplicate transaction ids to be distributed, which will cause errors during transaction processing. If you wish to change these after transactions have been created you must backup then empty the module transaction table in the database.

4.1.1.4 Delete Orders on Failure

Set to yes to delete the order when the authorization fails. Otherwise the internal order status is set to 'PAYMENT_FAILED'.

4.1.1.5 Logging Level

Messages of this or a higher level will be logged.

4.1.2   OXID 6 Installation

After uploading the plugin via S/FTP, log into your server via SSH and navigate to the root folder of OXID. In this directory, run the following commands so the plugin is available in the backend:

command vendor/console/bin oe:module:install-configuration source/modules/customweb /docdatacw/

php vendor/bin/oe-console oe:module:activate docdatacw

php vendor/bin/oe-console oe:module:apply-configuration

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 **Shop Settings > Payment Methods** . Each method is listed individually.

Install the payment methods you wish to offer your customers. Open the payment method and tick the box next to **Active**.

By clicking on DocData Configuration, you can save different settings for each payment method and thereby optimally adapt the payment methods to your existing processes

> ### Payment Methods not Displayed in the Checkout
>
> Please check if you have attributed the payment method to the available countries as well as customer groups in case a should payment method not be visible in the checkout.

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

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

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 DocData module.

6.1 Useful Transaction Information on the Order

In the tab **DocData Transactions** you can find an overview of the transaction information. Among others, this information allows for the definite attribution of the orders to their corresponding transaction, seen in the backend of DocData.

Autorisierungsbetrag	947.19
Währung	EUR
Zahlungsmethode	Visa
Zahlungsid	25839786
Verbuchter Betrag	947.19
Transaktion autorisiert	Ja
Transaktion ist unsicher	Nein
Transaktion verbucht	Ja
Transaktion bezahlt	Ja
Akzeptanz	test123
Kartennummer	XXXXXXXXXXXX0003
Kartenablaufdatum	12/15
Händler Referenz	ox_sel_pf_2

Figure 6.1: Transaction Information in OXID

6.2 Using Invoice Details of a Processor

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

6.2.1 OXID Order Confirmation (E-Mail)

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

6.2.2 OXID Invoice (PDF)

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

6.2.3 OXID-Backend (Transaction details)

You can view the transaction details in OXID under **Administer Orders > DocData Transactions**.

Figure 6.1: Transaction details within OXID.

6.2.4 OXID Success-Page

Figure 6.1: Payment information on the OXID "Success-Page".

6.3 Capturing / Cancelling of Orders

Our module allow you to capture payments directly from within Oxid eSales without having to log into DocData.

6.3.1 Capturing Orders

In order to capture orders, open the transaction tab (DocData Transactions). By clicking on the button **Capture** a new window will open up in which you can capture transactions.

You can now capture each item individually if you don't want to ship them all at once. The amount of possible partial captures depends on your contract. For more information on this, please contact DocData directly.

Capturing of Orders in the backend of DocData

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

I you do not want to capture all items of an orders, click on 'Close transaction for further captures'.

Name	SKU	Typ	Steuersatz		Menge	Gesamttotal (exkl. MwSt.)	Gesamttotal (inkl. MwSt.)
Trapez ION SOL KITE 2011	1401	product	0 %		2	216.80	216.80
Transportcontainer THE BARREL	3788	product	0 %		1	20.97	20.97
Shipping	shipping	shipping	0 %		1	6.90	6.90

Gesamtbuchungsbetrag: 244.67 EUR

Transaktion für weitere Buchungen schliessen ☐

Buchung

Figure 6.1: Capturing of Orders in OXID eSales.

Partial Capturing

Please find out if the capturing of partial amounts is supported by your DocData contract. If this is not the case, it might happen that no further captures can be carried out.

6.3.2 Cancelling Orders

By clicking **Cancel** the transaction is **cancelled** and the amount reserved on the customer's card will be released immediately.

6.4 Refunding Orders

In order to refund orders, open the transaction tab (DocData Transactions) and click on **Refund**. A new window will open up.

You can refund every item individually or any amount of your choice by modifying the total amount to pay or the amount of items.

Figure 6.1: Refunds in OXID eSales for DocData.

Maximal Refund

With our module it is not possible to refund more than 100% of the originally authorised amount.

Executing a refund will not change the status of the order.

6.5 Setup a Cron Job to Activate the Timed Operations

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

In order to use the timed operations, please schedule a cron job in your server to the following controller:

http://urltoyourstore.com/index.php?cl=docdatacw_cron

Here we suggest you use a Cron Engine like for example EasyCron. That way you can 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.

> **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

VISA		VISA
Card number	4111 1111 1111 1111	
Expiry Date	03/2027	
Name	Hans Muster	
CID	333	
3D-Secure	ECI = 5	

Mastercard		Mastercard
Card number	5100 0000 0000 0008	
Expiry Date	03/2027	
Name	Hans Muster	
CID	333	
3D-Secure	ECI = 2	

American Express		American Express
Card number	3411 1111 1111 111	
Expiry Date	03/2027	
Name	Hans Muster	
CID	2234	

Maestro		Maestro
Card number	6703 0500 0340 17105	
Expiry Date	09/2022	
Name	Hans Muster	
CID	333	
3D-Secure	ECI = 2	

Bancontact Mister Cash		Bancontact Mister Cash
Card number	6703 0500 0340 53002	
Expiry Date	09/2022	
Name	Hans Muster	
CID	333	

MasterCard

Mastercard   Mastercard
Card number   5100 0000 0000 0008
Expiry Date   03/2027
Name   Hans Muster
CID   333
3D-Secure   ECI = 2

Maestro

Maestro   Maestro
Card number   6703 0500 0340 17105
Expiry Date   09/2022
Name   Hans Muster
CID   333
3D-Secure   ECI = 2

Visa

VISA   VISA
Card number   4111 1111 1111 1111
Expiry Date   03/2027
Name   Hans Muster
CID   333
3D-Secure   ECI = 5

American Express

American Express   American Express
Card number   3411 1111 1111 111
Expiry Date   03/2027
Name   Hans Muster
CID   2234

Bancontact

Bancontact Mister Cash   Bancontact Mister Cash
Card number   6703 0500 0340 53002
Expiry Date   09/2022
Name   Hans Muster
CID   333

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 DocData 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 an easier way.

9.1 Birthday and gender in OXID

For certain payment service providers it is necessary to check the birthday and the gender of a customer. OXID does not check this by default. These checks can be enabled under "Settings > Other Settings > Mandatory fields in User Registration Form".

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 DocData settings.

- 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 OXID log directory. Please make sure the folder and it is writable by the webserver. (Default Path: {shopRootDirectory}/logs/)

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

```
require_once dirname(__FILE__) . "/bootstrap.php";
```

Include the module module classes.

```
require_once 'modules/customweb/docdatacw/classes/DocDataCwHelper.php';
```

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

```
$transactionById = DocDataCwHelper::loadTransaction(transactionId);
$transactionObject = $transactionById->getTransactionObject();
```