

Installation Manual for Trustly xt:Commerce

This manual describes the installation and usage of the Trustly extension for xt:Commerce.

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1 Introduction

This manual describes how to install, configure and use the payment module for xt:Commerce and Trustly.

Before you begin with the installation make sure you have all of the necessary data. You will need:

- Trustly Username and Password
- Trustly RSA Private Key
- xt:Commerce Payment Module from sellxed.com/shop
- Entry 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 necessary to install the module. Strictly follow the steps on the check list when setting up the module. This is the only way to ensure a safe usage in compliance with all security regulations.

1. Before beginning with the installation you will need your username and password which you will receive from your integration manager.
2. Generate a new RSA Private and RSA Public Key
3. Configuration of the [Main Module](#)
4. Configuration of the accepted [payment methods](#) and the respective authorization methods
5. Conducting a test order

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 Trustly might not get through to the shop.

1.2 System Requirements

In general, the plugin has the same system requirements as xt:Commerce. 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.

1.3 Configuration of the Main Module

For the commissioning of the main module you will need to enter your credentials. Firstly you will need a RSA public and private key pair that you need to generate in the module and subsequently send the public key to your Trustly integration manager. Secondly you will need your username and password that you receive from Trustly after providing them with the RSA public key.

1.3.1 Creating an RSA Private and Public Key for Test and Live

Via Settings > Trustly you will find an RSA Key Generator for the live and test platform. Here you can create an RSA keypair. Generate a new keypair and download the public key to your local computer. The private key is stored securely in the module. Now you need to send the public key to your contact at Trustly. In case your certificate gets compromised you can also regenerate a keypair [here](#).

1.3.2 Configuration Username and Password

For the configuration of the main module you will need to enter your password and username which you receive from your Trustly integration manager into the backend of your shop system.

1.3.3 Important Information Regarding Dealers in the Financial Services Sector

If you operate in the financial services sector make sure to set the option Mobile Phone Number to "Mobile is Required" in the backend of your shop.

1.4 Configuration of the Payment Methods

Further information regarding the configuration of the payment methods and the implementation of the different settings can be found [here](#). Once you have activated and configured the payment methods you can run a test.

1.5 Activating the Account

When you have successfully completed the test runs, you can request for the activation of your account. Your integration manager is in charge of that. Enter the received Live Credentials for the Live Environment into the [Main Module](#) Switch now into the RSA Generator for the Live keys. You can download the public key for the live platform and send it to your integration manager at Trustly. Once your live certificate is configured and your live credentials are set you are able to process Trustly transactions.

2 Module Installation and Update in the xt:Commerce Shop

2.1 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.

2.2 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.

2.2.1 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.

2.2.2 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 Module Configuration in the xt: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.

3.1 Base Module Configuration

The settings for the Base Module can be found in **"Content > Plugin > deinstalled plugins > Trustly Base Module"**. To install the module, click 'install'. A new window should open now. Next, click F5 in your browser in order to reload all Java Script data of the modules and then return to the location of the installed plugins.

The settings of the module can be opened by clicking on the pen. Enter the options that you set in the administration surface of Trustly. If an option is unclear, a click on the question mark will show more information. The central settings will be explained.

3.1.1 Sending e-Mails for status updates

Mark every status that you want to trigger an e-Mail to the customer if his order was set to this status.

3.2 Payment Method Configuration

After the Basic Module was configured successfully, the payment method settings for your shop can be found under Settings >. Every method is listed separately. Activate the desired payment methods by selecting them and clicking **Activate Selection**.

With a click on the pen, a new window for the settings will open. Most settings are self-explanatory. A click on the question mark shows additional information.

3.2.1 Choosing the Authorization Method

You can choose between several display options for the authorization of card payments. The option Authorization Method determines, which payment methods you would like to process.

For further information on the different authorization methods, visit our [sellxed Website](#).

3.2.2 Payment Form Position

If you have the corresponding package of Trustly, the payment information can be entered directly in your shop. The setting **Page for Payment Form** adjusts the position of the payment form

Payment Processing

Please bear in mind that additional options with Trustly have to be enabled in order to use some of the payment processing methods.

Some authorization methods might not be available for every payment method.

3.2.3 Capturing Orders Directly

The option "Capturing" determines whether payments should be captured directly or if they should be authorized before. If you only want to authorize as a first step, ensure that the payments are issued later.

Depending on your Acquiring Contract, a reservation is guaranteed for a limited time only. If you are not capturing within this time, the authorization might not be guaranteed. Further information on the process of capturing is provided below.

Varying Settings between Trustly - backend and module

The settings in the payment method module might overwrite your settings in the Trustly backend.

3.2.4 Uncertain Status

You can mark orders without a 3D Secure Verification or other security mechanism failures. This allows you to examine the order manually before the shipment.

3.2.5 Setting the Order Status

You can determine which status the order should have for every payment method. This refers to the initial order status.

3.3 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 Trustly and the module

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

3.4 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.

3.4.1 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.

3.5 Stock Management in xt:Commerce 4 / 5

Since the 19.05.2017 we changed the way we handle the stock implementation in xt:Commerce 4 / 5. Products will now automatically be restocked when the status of the order is changed to failed. The status of the order is automatically changed to failed if the customer does click on the cancel button on the payment page. However if he uses the back button in the browser we can not determine the status of the order. In this case you have to manually cancel the order to restock the items.

Please note the stock will automatically be increased if you switch an order into the failed state.

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

4 Settings / Configuration of Payment Methods

4.1 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 Trustly 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.

4.2 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 Trustly** or any similar pending status which is implemented by the module.

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

Orders with the status 'pending Trustly' 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 Trustly are being blocked. In this case check the settings of your firewall and ask the Hoster to activate the IPs and User Agents of Trustly.

4.2.2 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 The Module in Action

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


Transaction Information	
Transaction ID	33
Transaction External ID	17_33
Authorization Status	successful
Order ID	17
Created On	2014-05-17T15:09:25+02:00
Updated On	2014-05-17T15:09:37+02:00
Customer ID	2
Zahlungsid	31411549
Autorisierungsbetrag	100
Währung	CHF
Zahlungsmethode	MasterCard
Zahlungsid	31411549
Verbuchter Betrag	100
Transaktion autorisiert	Ja
Transaktion ist unsicher 	Nein
Transaktion verbucht	Ja
Transaktion bezahlt	Ja
Alias	XXXXXXXXXXXX0007 (05/17)
Alias Token	_xtc_4_17_330007
Akzeptanz	
Kartenummer	XXXXXXXXXXXX0007
Kartenablaufdatum	05/17
Händler Referenz	demo_sx_ps_xtc_4_17_33

Figure 5.1: Transaction Information.

5.1 Order Transaction Information

In each order processed by our module, you can view all important information on the transaction. For instance, this feature allows you to match the orders to the transactions visible in the Trustly backend.

To view this information, open the orders. At the bottom of the order you will find the paragraph **Trustly Transactions**. This shows all details on all former actions related to this order. Click on the key in the column "Action" to see the transaction information (c.f. image "Transaction Information").



<div> Speichern Bestellbestätigungsmail senden </div>				
Transactions				
Transaction ID	Datum	Status	Amount	Action
32	2014-05-17T15:06:08+02:00	pending	100.00	
33	2014-05-17T15:09:25+02:00	successful	100.00	
				Add Moto Transaction

Figure 5.1: Transaction Overview

Dashboard	xt:Commerce Payments Registration	installierte Plugins	Zahlungsweise	PostFinance Transak			
Aktion							
Neu Laden							
Transaction ID	Externe ID	Order ID	Zahlungsmet...	Änderungsda...	Zahlungsid	Autorisierung...	At
33	17_33	17	mastercard	05/17/2014	31411549	100.00000	su
32	17_32	17	mastercard	05/17/2014		100.00000	pe
31	16_31	16	postfinanceef...	05/11/2014		50.00000	pe
30	16_30	16	postfinanceef...	05/12/2014		50.00000	fai
29	15_29	15	creditcard	04/22/2014	30860419	150.00000	su
28	14_28	14	postfinanceef...	04/22/2014	30860413	100.00000	su
27	13_27	13	creditcard	04/22/2014	30860400	330.00000	su
26	12_26	12	postfinanceef...	04/17/2014	30785914	70.00000	su
25	11_25	11	creditcard	04/17/2014	30785907	50.00000	su
24	11_24	11	creditcard	04/17/2014		50.00000	pe
23	10_23	10	creditcard	04/17/2014	30785876	250.00000	su
22	10_22	10		04/17/2014			
21	10_21	10	creditcard	04/17/2014		250.00000	fai
20	10_20	10		04/17/2014			
19	10_19	10	creditcard	04/17/2014		250.00000	fai
18	10_18	10		04/17/2014			
17	10_17	10	creditcard	04/17/2014		250.00000	fai
16	9_16	9	postfinanceef...	04/16/2014	30766475	50.00000	su
15	9_15	9	postfinanceef...	04/16/2014		50.00000	pe
14	9_14	9	postfinanceef...	04/16/2014	30766459	50.00000	fai
13	8_13	8	postfinancec...	04/16/2014	30766433	70.00000	su
12	7_12	7	postfinanceef...	04/16/2014	30766421	50.00000	su
11	6_11	6	creditcard	04/16/2014	30766406	50.00000	su
10	5_10	5	creditcard	04/16/2014	30766403	100.00000	su
9	4_9	4	postfinanceef...	04/16/2014	30765947	50.00000	su

Figure 5.1: Transaction Information

5.2 Transaction Table

In addition to information on the order, the transaction table shows information on the transactions in your shop. Among other things, it allows you to match the Trustly transaction number to the order in your shop.

Dashboard

xt:Commerce Payments Registration

installierte Plugins

Zahlungsweise

PostFinance Transaktionen

Aktion

Neu Laden


























Transaction ID	Externe ID	Order ID	Zahlungsmet...	Änderungsda...	Zahlungsid	Autorisierung...	Autorisierung...	Bezahlt	V	Actions
33	17_33	17	mastercard	05/17/2014	31411549	100.00000	successful	y	C	
32	17_32	17	mastercard	05/17/2014		100.00000	pending	n	C	
31	16_31	16	postfinanceef...	05/11/2014		50.00000	pending	n	C	
30	16_30	16	postfinanceef...	05/12/2014		50.00000	failed	n	C	
29	15_29	15	creditcard	04/22/2014	30860419	150.00000	successful	y	C	
28	14_28	14	postfinanceef...	04/22/2014	30860413	100.00000	successful	y	C	
27	13_27	13	creditcard	04/22/2014	30860400	330.00000	successful	y	C	
26	12_26	12	postfinanceef...	04/17/2014	30785914	70.00000	successful	y	C	
25	11_25	11	creditcard	04/17/2014	30785907	50.00000	successful	y	C	
24	11_24	11	creditcard	04/17/2014		50.00000	pending	n	C	
23	10_23	10	creditcard	04/17/2014	30785876	250.00000	successful	y	C	
22	10_22	10		04/17/2014				y		
21	10_21	10	creditcard	04/17/2014		250.00000	failed	n	C	
20	10_20	10		04/17/2014				y		
19	10_19	10	creditcard	04/17/2014		250.00000	failed	n	C	
18	10_18	10		04/17/2014				y		
17	10_17	10	creditcard	04/17/2014		250.00000	failed	n	C	
16	9_16	9	postfinanceef...	04/16/2014	30766475	50.00000	successful	y	C	
15	9_15	9	postfinanceef...	04/16/2014		50.00000	pending	n	C	
14	9_14	9	postfinanceef...	04/16/2014	30766459	50.00000	failed	n	C	
13	8_13	8	postfinanceef...	04/16/2014	30766433	70.00000	successful	y	C	
12	7_12	7	postfinanceef...	04/16/2014	30766421	50.00000	successful	y	C	
11	6_11	6	creditcard	04/16/2014	30766406	50.00000	successful	y	C	
10	5_10	5	creditcard	04/16/2014	30766403	100.00000	successful	y	C	
9	4_9	4	postfinanceef...	04/16/2014	30765947	50.00000	successful	y	C	

Figure 5.1: Transaction Information.

5.2.1 Refunding Orders

In order to issue a refund, open the transaction information (c.f. above). This shows all information on the transaction. With a click on "Refund", an input mask for credit notes will open. By clicking **Refund**, the refund request is transmitted to Trustly.

REFUND

Refund

Name	SKU	Type	Tax Rate	Quantity	Total Amount (excl. Tax)	Total Amount
Standardartikel	art001	product	0 %	<input type="text" value="1.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
Artikel mit Sonderpreis	art002	product	0 %	<input type="text" value="1.00"/>	<input type="text" value="70.00"/>	<input type="text" value="70.00"/>
Total Refund Amount:						120.00 CHF

Close transaction for further refunds ☐

Transactions History


 Schliessen

Figure 5.1: refund button

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

5.3 Setting up Cron Job

To activate the time-controlled plug-in functions (e.g. Update Service, deleting pendant orders, etc.), follow the Trustly instructions for the set up of Cron Job.

6 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.

6.1 Test Data

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

7 Errors and their Solutions

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

7.1 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Trustly 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](#).

8 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.

8.1 Log Levels

You can configure the log level in the Trustly settings.

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

8.2 Log Location

The log file is stored in the xt:Commerce log directory. Please make sure the path exists and it is writable by the webserver. (Default Path: {shopRootDirectory}/xtLogs/)

9 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.

9.1 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 xt:Commerce initialized in your script, this is required for the database connection.

```
$root_dir = dirname(__FILE__).' /';
define('_VALID_CALL','true');
define('_SRV_WEBROOT',$root_dir);

include _SRV_WEBROOT.'conf/debug.php';
include _SRV_WEBROOT.'conf/config.php';

include _SRV_WEBROOT.'conf/database.php';
include _SRV_WEBROOT.'conf/paths.php';
include _SRV_WEBROOT._SRV_WEB_FRAMEWORK.'function_handler.php';
include _SRV_WEBROOT._SRV_WEB_FRAMEWORK.'database_handler.php';
```

Include the module main file and module classes.

```
require_once 'plugins/trustlycw/init.php';
require_once 'plugins/trustlycw/lib/TrustlyCw/Util.php';
```

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

Load the transaction by Id:

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