

# Installation Manual for Trustly Magento

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

**Release Date:** Mon, 07 Aug 2023 14:01:06 +0200  
**Version:** 3.0.72

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

E-Mail: [info@sellxed.com](mailto: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

<b>1</b>	<b>Introduction .....</b>	<b>5</b>
1.1	Installation Process .....	5
1.2	System Requirements .....	6
1.3	Configuration of the Main Module .....	7
1.3.1	Creating an RSA Private and Public Key for Test and Live .....	7
1.3.2	Configuration Username and Password .....	7
1.3.3	Important Information Regarding Dealers in the Financial Services Sector .....	7
1.4	Configuration of the Payment Methods .....	7
1.5	Activating the Account .....	7
<b>2</b>	<b>Module Installation and Update in the Magento Shop .....</b>	<b>8</b>
2.1	Installation .....	8
2.1.1	Magento 1 .....	8
2.1.2	Magento 2 .....	8
2.2	Updates and Upgrades .....	9
2.2.1	Update Checklist .....	10
2.2.2	Update Instructions .....	10
2.3	Database Migration .....	11
2.3.1	Magento 1 .....	11
2.3.2	Magento 2 .....	11
<b>3</b>	<b>Module Configuration in the Magento Shop .....</b>	<b>12</b>
3.1	Configuration of the Main Module .....	12
3.1.1	Magento 1 .....	12
3.1.2	Magento 2 .....	12
3.2	Configuration of the Payment Method .....	13
3.2.1	Magento 1 .....	13
3.2.2	Magento 2 .....	14
3.3	Direct Capturing of Transactions .....	14
3.4	Uncertain Status .....	14
3.4.1	Setting the order state .....	15
3.5	Optional: Validation .....	15
3.5.1	Usage of the Integrated Multishop Functionality of Magento .....	15
<b>4</b>	<b>Settings / Configuration of Payment Methods .....</b>	<b>16</b>
4.1	General Information About the Payment Methods .....	16
4.2	Information on Payment Status .....	16
4.2.1	Order status "pending" / imminent payment (or similar) .....	16

4.2.2	Order status "cancelled" .....	16
<b>5</b>	<b>The Module in Action .....</b>	<b>17</b>
5.1	Refunds .....	17
5.1.1	Magento 1 .....	17
5.1.2	Magento 2 .....	19
5.2	Useful Transaction Information on the Order .....	22
5.2.1	Magento 1 .....	22
5.2.2	Magento 2 .....	23
5.3	Tax Calculation Settings .....	24
5.3.1	Magento 1 .....	24
5.4	OneStepCheckout .....	25
5.4.1	Magento 1 .....	25
5.4.2	Magento 2 .....	25
5.5	Setup a Cron Job to Activate the Timed Operations .....	25
5.5.1	Magento 1 .....	25
5.5.2	Magento 2 .....	26
5.6	Magento 1 API Manual .....	26
5.6.1	General Information on Using the API .....	26
5.6.2	API Calls .....	26
<b>6</b>	<b>Testing .....</b>	<b>27</b>
6.1	Test Data .....	27
<b>7</b>	<b>Errors and their Solutions .....</b>	<b>28</b>
7.1	Module is not shown .....	28
7.2	The Referrer URL appears in my Analytics Tool .....	28
<b>8</b>	<b>Compatibility with Third-Party Plugins .....</b>	<b>29</b>
8.1	Magento 1 .....	29
8.1.1	Fees and discounts within Magento .....	29
8.2	Birthday and gender in Magento 1 .....	29
8.3	Birthday and gender in Magento 2 .....	29
<b>9</b>	<b>Error Logging .....</b>	<b>30</b>
9.1	Log Levels .....	30
9.2	Log Location .....	30
<b>10</b>	<b>Advanced Information .....</b>	<b>31</b>
10.1	Transaction Object .....	31
10.1.1	Magento 1 .....	31
10.1.2	Magento 2 .....	31

# 1 Introduction

This manual describes how to install, configure and use the payment module for Magento 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
- Magento Payment Module from [sellxed.com/shop](https://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 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.

## 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 System > Trustly for Magento 1 and under Stores > Trustly for Magento 2 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 Magento 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.

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

#### 2.1.1 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.

#### 2.1.2 Magento 2

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

### 2.1.2.1 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>

### 2.1.2.2 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.

## 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](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.

#### 2.2.2.1 Magento 1

1. Download the newest version of the plugin. The download is available in your sellxed.com account under "My Downloads".
2. Extract the ZIP file.
3. Upload the folder **files\_1** into the root directory of your shop.
4. Clear the Magento cache

#### 2.2.2.2 Magento 2

1. Download the newest version of the plugin. The download is available in your sellxed.com account under "My Downloads".
2. Extract the ZIP file.
3. Upload the folder **files\_2** into the root directory of your shop.
4. Clear the Magento cache

## 2.3 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.

### 2.3.1 Magento 1

Clear the Magento cache

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

### 2.3.2 Magento 2

From the command line run the following command:

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

## 3 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.

### 3.1 Configuration of the Main Module

#### 3.1.1 Magento 1

The settings for the main module can be found under **System > Configuration > Trustly**. Enter the various options, some of which you have already specified in the configuration with Trustly. 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 Trustly. 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](#).

#### 3.1.2 Magento 2

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

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

## Shop



<b>Kunden Alias Management</b>	<input type="text" value="Nein"/>	[STORE VIEW]
	Sie können Ihren Kunden gestatten ihre Aliasse auf ihrem Konto zu verwalten/löschen.	
<b>Benachrichtigung abwarten</b>	<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



<b>Betriebsmodus</b>	<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.	
<b>Live account ID</b>	<input type="text"/>	[STORE VIEW]
	The live account ID as given by the <a href="#">Salesway</a> .	
<b>Live API password</b>	<input type="text"/>	[STORE VIEW]
	The live API password as given by <a href="#">Salesway</a> .	
<b>Test Account ID</b>	<input type="text"/>	[STORE VIEW]
	The test account ID as given by the <a href="#">Salesway</a> . Generic test account: 401860-17795278	
<b>Test API password</b>	<input type="text"/>	[STORE VIEW]
	The test API password as given by <a href="#">Salesway</a> . Password for generic test account: 8e7Yn5yk	
<b>Liability Shift Behavior</b>	<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?	
<b>Bestell-Präfix</b>	<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 <a href="#">Salesway</a> . The prefix must contain the tag {id}. It will then be replaced by the order number (e.g. name_{id}).	

**Figure 3.1:** Magento 2: Configuration of the basic module. Please note, that this is an example and the settings can differ.

## 3.2 Configuration of the Payment Method

### 3.2.1 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.

### 3.2.1.1 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".

## 3.2.2 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.

### 3.2.2.1 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.

### 3.2.2.2 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. Please note that for some authorization methods with credit cards there are extended PCI requirements. (<https://www.sellxed.com/en/blog/pci-300-changes>).

## 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 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

### 3.5.1 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.

## 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.

### 5.1 Refunds

#### 5.1.1 Magento 1

You can refund already captured transactions and automatically transmit them to Trustly. 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 Trustly.

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

Order # 200000003 | 17.04.2014 16:40:42

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

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

Figure 5.1: 1. open the invoice

Invoice #100000026 | Paid | 23.04.2014 18:52:08 (the invoice email is not sent)

Order # 100000043 (the order confirmation email was sent)

Order Information		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 5.1: 2. click on credit memo - Important - open the invoice first!

Refund Totals

Subtotal	156,00 €
Refund Shipping	5
Adjustment Refund	0
Adjustment Fee	0
<b>Grand Total</b>	<b>161,00 €</b>

Append Comments

Email Copy of Credit Memo

Refund Offline  Refund

Figure 5.1: 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"/>
<b>Grand Total</b>	<b>161,00 €</b>

Append Comments  
 Email Copy of Credit Memo

Figure 5.1: 4. To process the refund click on **Refund**.

The credit memo has been created.

Order # 100000041 | 23.04.2014 18:26:16

Order # 100000041 (the order confirmation email was sent)	Account Information
Order Date: 23.04.2014 18:26:16	Customer Name: <a href="#">Test Test</a>
Order Status: Closed	Email: <a href="mailto:info@customweb.com">info@customweb.com</a>
Purchased From: Main Website Main Store English	Customer Group: General
Placed from IP: 160.85.155.47	

Figure 5.1: Wait for the confirmation of the refund.

### 5.1.1.1 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 # 200000055 | 02.12.2013 16:37:59

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 5.1: Overview of all Refunds

### 5.1.1.2 Refunding of Any Amount

As each position of the order needs to be transmitted to Trustly 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.

## 5.1.2 Magento 2

### 5.1.2.1 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 5.1:** 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.'));
```

### 5.1.2.2 Performing Credits

For registered transactions you can create credits and transmit them automatically to Trustly . 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

Search by keyword 🔍   Filters   Default View ▾   Columns ▾   Export ▾

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

<input type="checkbox"/>	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	<a href="#">View</a>

Figure 5.1: 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 5.1: 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"/>
	<b>Grand Total</b>	<b>161,00 €</b>

Append Comments  
 Email Copy of Credit Memo

**Figure 5.1: 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

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

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 5.1:** 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.

## 5.2 Useful Transaction Information on the Order

### 5.2.1 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		
<b>Authorisation amount</b>	161.0000	
<b>Currency</b>	CHF	
<b>Payment method</b>	MasterCard	
<b>Payment ID</b>	23679571	
<b>Captured amount</b>	161	
<b>Transaction authorised</b>	Yes	
<b>Transaction uncertain</b> 	No	
<b>Transaction captured</b>	Yes	
<b>Transaction paid</b>	Yes	
<b>Alias</b>	XXXXXXXXXXXX0007 (12/13)	
<b>Alias Token</b>	8B1974E9-59EB-442C-A1D4-34BEC568EE23	
<b>Acceptance</b>	test123	
<b>Card number</b>	XXXXXXXXXXXX0007	
<b>Card expiry date</b>	12/13	
<b>Merchant reference</b>	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 5.1: Transaction Information.

## 5.2.2 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 5.1: Transaction Information.

## 5.3 Tax Calculation Settings

### 5.3.1 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.

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

**Figure 5.1:** 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.

## 5.4 OneStepCheckout

### 5.4.1 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 Trustly Magento, please make sure that you are using one of the following:

- OneStepCheckout by [www.onestepcheckout.com](http://www.onestepcheckout.com)
- OneStepCheckout by [Ahead Works](#)
- LightCheckout by [GoMage](#)
- Firecheckout by [Templates Master](#)

### 5.4.2 Magento 2

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

## 5.5 Setup a Cron Job to Activate the Timed Operations

### 5.5.1 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

Trustly. Please note it could be that in order to use the update feature it may be necessary that Trustly 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.

## 5.5.2 Magento 2

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

## 5.6 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.

### 5.6.1 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>

### 5.6.2 API Calls

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

#### 5.6.2.1 API V1

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

#### 5.6.2.2 API V2

- `$client->trustlycwTransactionList($session);` //List of all transactions
- `$client->trustlycwTransactionInfo($session, {transactionId});` //Single Transaction

#### 5.6.2.3 XML-RPC

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

#### 5.6.2.4 REST

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

## 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 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'`

### 7.2 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 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.

### 8.1 Magento 1

#### 8.1.1 Fees and discounts within Magento

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

- [Fooman Surcharge](#)

### 8.2 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".

### 8.3 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".

## 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 Trustly 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.

### 9.2 Log Location

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

## 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.

#### 10.1.1 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:

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

Load the transaction object by Order Number:

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

#### 10.1.2 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\TrustlyCw\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();
```