

# Installation Manual for Trustly e-Commerce

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

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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

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# 1 Introduction

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

### 1.2.1 Creating an RSA Private and Public Key for Test and Live

Via 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.

### 1.2.2 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.

### 1.2.3 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.

## 1.3 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.

## 1.4 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 e-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](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 e-Commerce Shop

The configuration consists of two steps. The first step is the configuration of the main module with all the basic settings (cf. [Configuration of the Main Module](#)). During the second step you can then carry out individual configurations for each [payment method](#). This allows for full flexibility and perfect adaptation to your processes.

### Create backups!

Please create a backup of the main directory of your shop. In case of problems you will then always be able to return your shop to its original state.

We furthermore recommend testing the integration on a test system. Complications may arise with third party modules installed by you. In case of questions, our support is gladly at your disposal.

### 3.1 Basic Module Configuration

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

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

### 3.2 Payment Method Configuration

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

### 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

## 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 Useful Information on Transactions

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

You can find the orders at Dashboard > Store Sales.

#	Transaction Number	Date	Payment method	Is authorised	Amount	Customer note	Add
8	26_8	2013-10-04 11:29:35	Saferpay Test Card	Yes	200.00		Less details
<b>Authorisation amount</b>			200.00				
<b>Currency</b>			EUR				
<b>Payment method</b>			Saferpay Test Card				
<b>Payment ID</b>			dzhzlbUOMIGAYWG618AIWkp5MA				
<b>Captured amount</b>			200				
<b>Refunded amount</b>			200				
<b>Transaction authorised</b>			Yes				
<b>Transaction uncertain</b> ?			No				
<b>Transaction captured</b>			Yes				
<b>Transaction paid</b>			Yes				
<b>Alias</b>			xxxx xxxx xxxx 0111				
<b>Card number</b>			xxxx xxxx xxxx 0111				
<b>Card expiry date</b>			12/2015				
<b>Card Type</b>			Saferpay Test Card				
<b>3D Secure</b>			Successful				
<b>Captures</b>							

Figure 5.1: Transaction information in WordPress E-Commerce.

### 5.2 Order Refunds

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

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

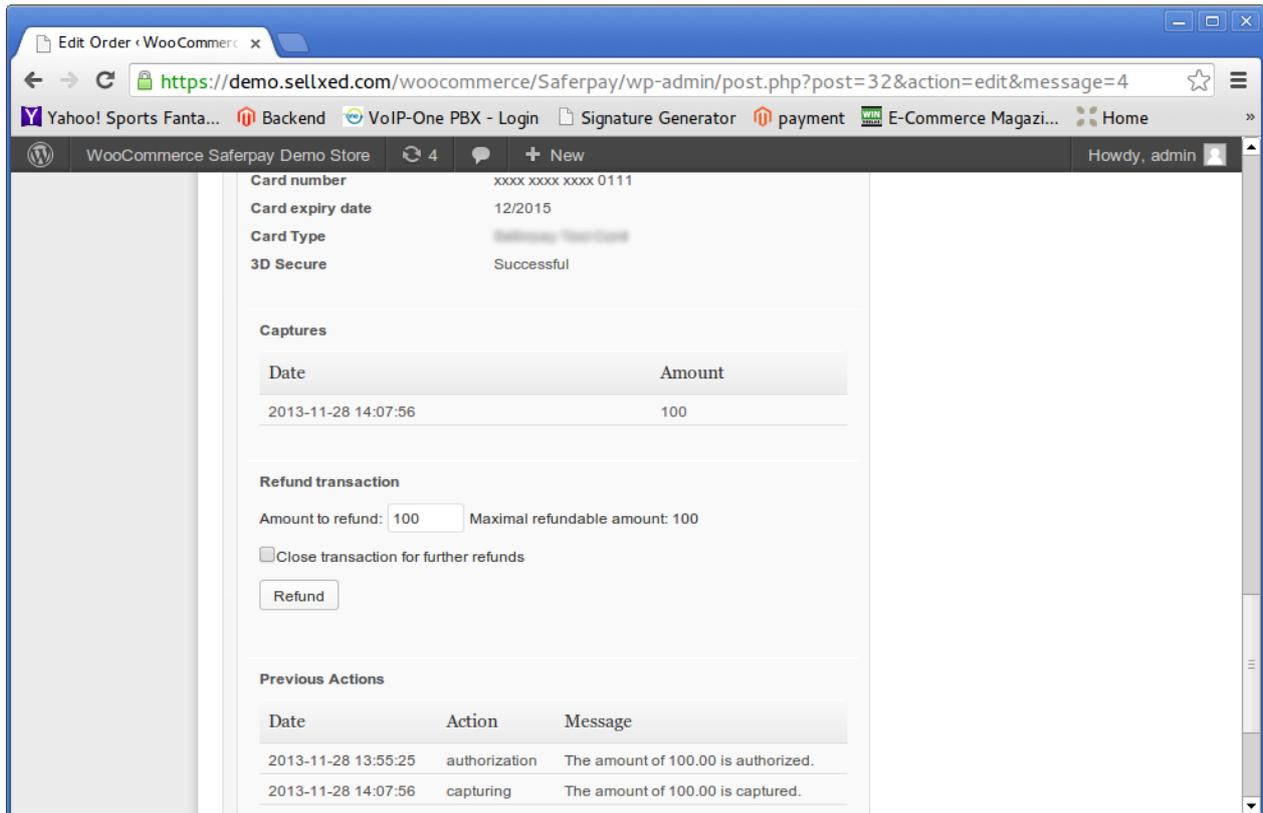


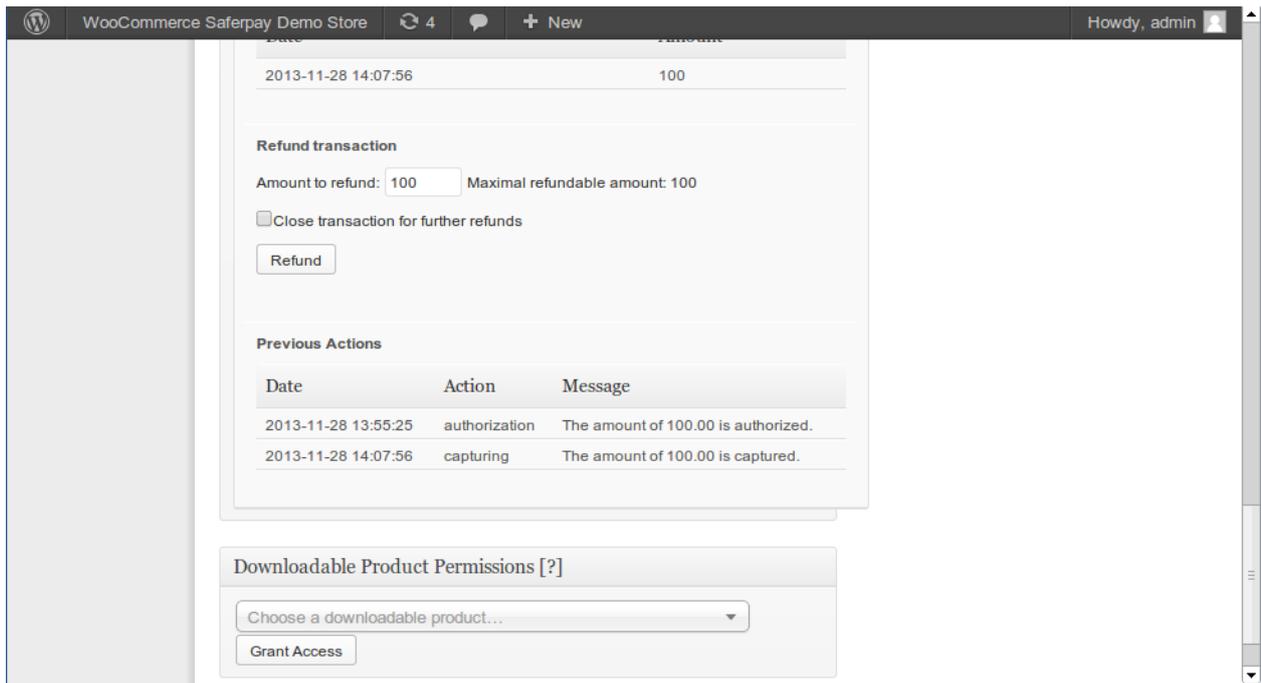
Figure 5.1: Refunds in WooCommerce for Trustly.

## Maximum Refund

Our module restricts the refund amount to 100% of the originally authorised amount.

## 5.3 Transaction History

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



**Figure 5.1:** Transaction overview in the transaction history.

## 5.4 Cron Job Setup

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

The module uses the default e-Commerce cron. Information on the setup can be found [here](#).

## 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/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>

### 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 logs folder of this plugin **wp-content/plugins/plugins/ecommerce\_trustlycw/logs**. Please make sure the path exists and it is writable by the webserver.

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

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

Include the modules Util class.

```
require_once ABSPATH.'wp-content/plugins/ecommerce_trustlycw/classes/TrustlyCw/Util.php';
```

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

Load the transaction by Id:

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

Load the transaction by the external Id:

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

Load transactions by the order id:

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