# Installation Manual for Worldpay JSON xt: Commerce

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

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

E-Mail: info@sellxed.com

#### Telefon:

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

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# **Table of Contents**

1	Intro	oduction	5
	1.1	Installation Process	5
	1.2	System Requirements	6
2	Con	figuration of the Worldpay JSON Backend	7
	2.1	API Keys	7
		2.1.1 General Installation Settings	
		2.1.2 Adding a webhook	7
3	Mod	lule Installation and Update in the xt:Commerce Shop	8
	3.1	Installation	8
	3.2	Updates and Upgrades	8
		3.2.1 Update Checklist	
		3.2.2 Update Instructions	9
4	Mod	lule Configuration in the xt:Commerce Shop	10
	4.1	Base Module Configuration	10
		4.1.1 Sending e-Mails for status updates	10
	4.2	Defining the URL for the Transaction Feedback	10
	4.3	Payment Method Configuration	
		4.3.1 Choosing the Authorization Method	
		4.3.2 Payment Form Position	
		4.3.4 Uncertain Status	
		4.3.5 Setting the Order Status	
	4.4	Direct Capturing of Transactions	13
	4.5	Uncertain Status	13
		4.5.1 Setting the order state	13
	4.6	Stock Management in xt:Commerce 4 / 5	13
	4.7	Optional: Validation	14
5	Sett	ings / Configuration of Payment Methods	15
	5.1	General Information About the Payment Methods	15
	5.2	Information on Payment Status	15
		5.2.1 Order status "pending" / imminent payment (or similar)	
		5.2.2 Order status "cancelled"	15
6	The	Module in Action	16

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	6.1	Urder Transaction Information	16
	6.2	Transaction Table	
	6.3	Capturing / Cancelling Orders	
	6.4	Using the Alias Manager / Token Solution	20
	6.5	Setting up Cron Job	21
7	Test	ing	22
	7.1	Test Data	22
8	Erro	rs and their Solutions	23
	8.1	The Referrer URL appears in my Analytics Tool	23
9	Erro	r Logging	24
	9.1	Log Levels	24
	9.2	Log Location	24
10	Adv	ranced Information	25
	10 1	Transaction Object	25



# 1 Introduction

This manual describes the installation, configuration and application of the payment module for xt:Commerce and Worldpay JSON.

Make sure you have all the necessary data at hand before starting the installation:

- Access to the Worldpay JSON backend: <a href="https://online.worldpay.com/login">https://online.worldpay.com/login</a>
- Service Key, Client Key &
- xt:Commerce payment module from sellxed.com/shop
- Login data for your server and shop.

If you do not have a contract with Worldpay JSON yet, we can arrange one for you.

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 the information necessary to install the module. Strictly follow the steps in the check list when activating it. This ensures the safe use in compliance with all security regulations.



- 1. Configure the Worldpay JSON administration surface which can be accessed here: <a href="https://online.worldpay.com/">https://online.worldpay.com/</a>.
- 2. Configure the basic settings of the payment module
- 3. Configure the payment methods
- 4. Conduct a test order with the test data included at the end of this document
- 5. When the test was successful you will need to the the aformentioned steps again for the Worldpay JSON live account.

For this you will need to activate your account first. This can be done here: <a href="https://online.worldpay.com/activate">https://online.worldpay.com/activate</a>.

#### 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: <a href="http://www.sellxed.com/support">http://www.sellxed.com/support</a>. Furthermore, you have the option of ordering our installation service. We will make sure the plugin is installed correctly in your shop: <a href="http://www.sellxed.com/shop/de/integration-und-installation.html">http://www.sellxed.com/shop/de/integration-und-installation.html</a>

#### .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 Worldpay JSON 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.



# 2 Configuration of the Worldpay JSON Backend

# 2.1 API Keys

#### 2.1.1 General Installation Settings

You do not need to do any configurations. The API keys (Merchant ID, Service KEy, Client Key) **Settings > API Keys** can be found in the backend of Worldpay JSON and do not need to be modified.

#### 2.1.2 Adding a webhook

Webhooks can be added in your account under **Settings > Webhooks**. Please note that the URL can not contain any upper case letters as it otherwise will be rejected.

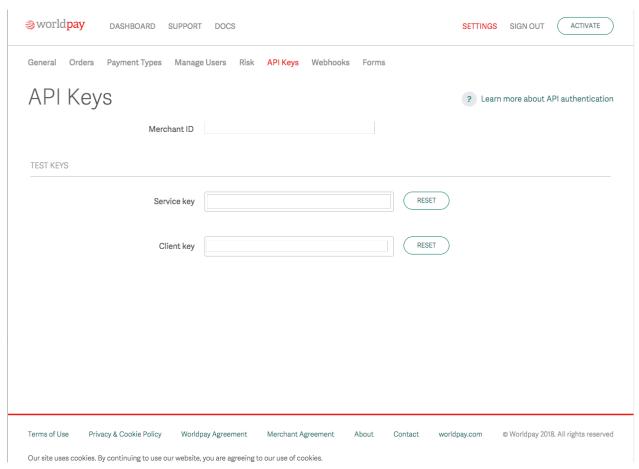


Figure 2.1: Merchant ID, Service Key, Client Key



# 3 Module Installation and Update in the xt: Commerce Shop

#### 3.1 Installation

At this time you should already be in possession of the module. Should this not be the case, you can download the necessary files in your customer account in the <u>sellxed shop</u> (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: <a href="http://www.sellxed.com/en/updates">http://www.sellxed.com/en/updates</a> 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.
- 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 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. <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 Base Module Configuration

The settings for the Base Module can be found in **"Content > Plugin > deinstalled plugins > Worldpay JSON Base Module"**. To install the module, click 'install'. A new window should open now. Next, cklick 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 Worldpay JSON. If an option is unclear, a click on the question mark will show more information. The central settings will be explained.

#### 4.1.1 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.

# 4.2 Defining the URL for the Transaction Feedback

To ensure correct payment processing in your shop, at least one Feedback URL has to be provided in the Worldpay JSON configuration. The URL to be entered can be found in your xt: Commerce Shop under the menu item **Settings > Worldpay JSON > Setup**.



## 4.3 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 seperately. 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.

#### 4.3.1 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 differen authorization methods, visit our sellxed Website.



#### 4.3.2 Payment Form Position

If you have the corresponding package of Worldpay JSON, 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 Worldpay JSON 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.

#### 4.3.3 Capturing Orders Directly

The option "Capturing" determines wether 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 Worldpay JSON - backend and module

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

#### 4.3.4 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.

#### 4.3.5 Setting the Order Status

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



## 4.4 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 Worldpay JSON and the module

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

#### 4.5 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.

#### 4.5.1 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.

### 4.6 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.



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

#### 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 Worldpay JSON 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	XXXXXXXXXXXXX0007 (05/17)					
Alias Token	xtc 4_17_330007					
Akzeptanz						
Kartennummer	XXXXXXXXXXXXX0007					
Kartenablaufdatum	05/17					
Händler Referenz	demo_sx_ps_xtc_4_17_33					

Figure 6.1: Transaction Information.

# **6.1 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 Worldpay JSON backend.

To view this information, open the orders. At the bottom of the order you will find the paragraph **Worldpay JSON 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").

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

Figure 6.1: Transaction Overview



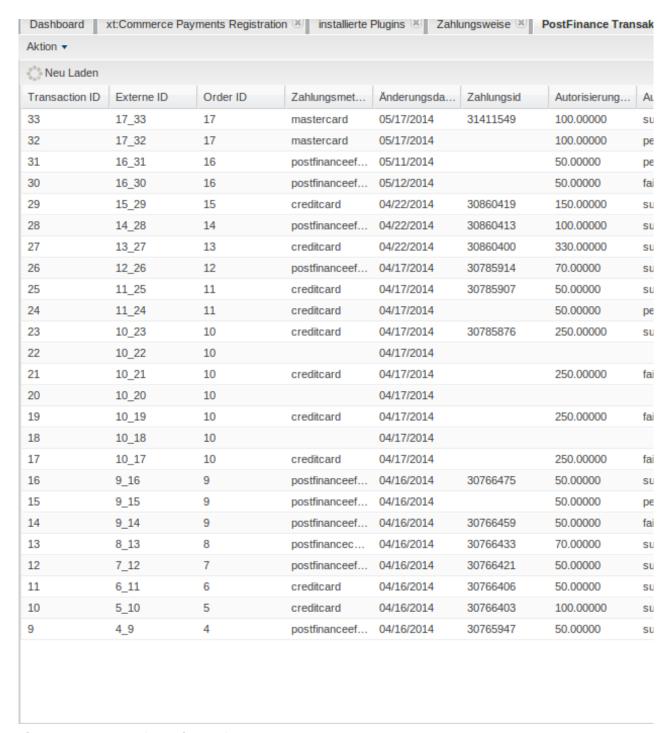


Figure 6.1: Transaction Information

#### 6.2 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 Worldpay JSON transaction number to the order in your shop.



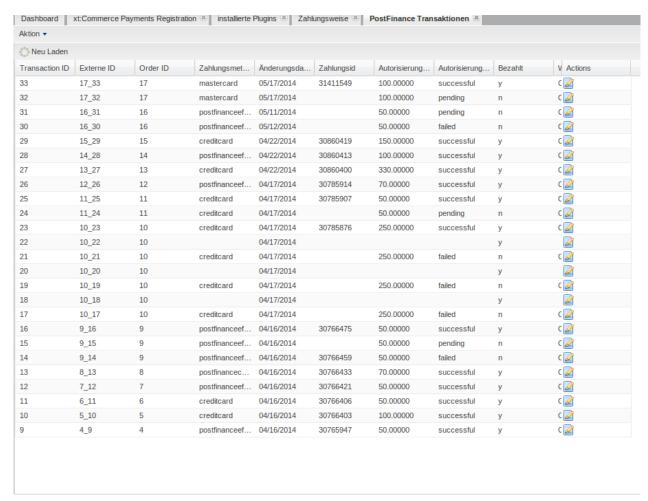


Figure 6.1: Transaction Information.

#### 6.2.1 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 Worldpay JSON.



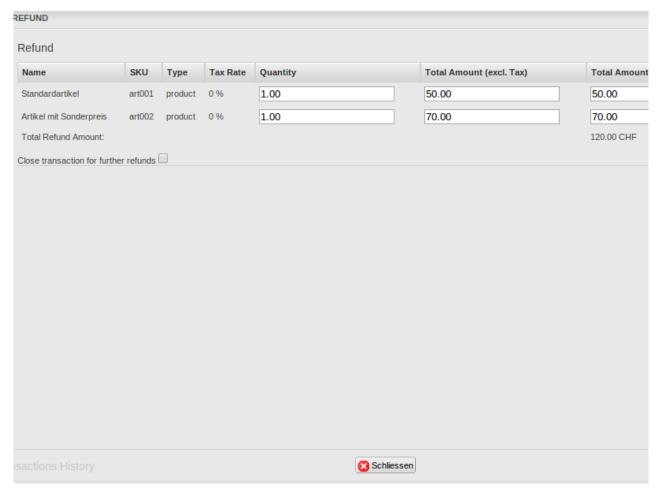


Figure 6.1: refund button

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

# 6.3 Capturing / Cancelling Orders

#### Please note:

The transaction management between Worldpay JSON and your shop is not synchronised. When you register payments with Worldpay JSON, the status in the shop is not adjusted and the order cannot be captured in the shop again.

#### 6.3.1 Capturing / Cancelling Orders

To capture orders, open the transaction information (c.f. above). This will show you all information on the transaction. With a click on "Capture" (top right), the order is forwarded to Worldpay JSON. You do not have to log in to the Worldpay JSON backend. You can enter the products you would like to capture in the input mask.

By clicking "Cancel" the transaction is cancelled and the reserved amount is cleared on the customer's card immediately.



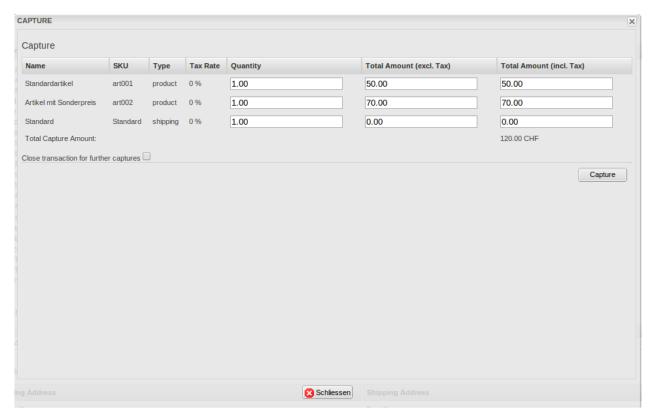


Figure 6.1: Capturing Transactions

# 6.4 Using the Alias Manager / Token Solution

The Alias Manager feature allows you to securely save your customers' credit card data at Worldpay JSON for future orders. You can enable this by activating the option "Alias Manager" in the configuration of the <u>Payment Method</u>. Now the customer can choose between already saved credit cards when ordering again, without having to enter all card information.



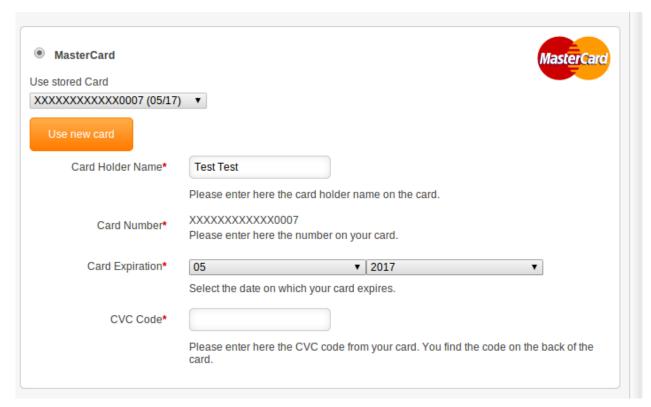


Figure 6.1: Alias Manager

#### Please remember:

It is necessary to enable the respective option with Worldpay JSON to use the Alias Manager. To do this, please contact the support team.

# 6.5 Setting up Cron Job

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



# 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

Card number 555555555555554444 Test Card number

Expiry Date 12/2020 CVC 123



# 8 Errors and their Solutions

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

## 8.1 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Worldpay JSON 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: <u>under bullet point 4</u>.



# 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 Worldpay JSON settings.

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

# 9.2 Log Location

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



# 10 Advanced Information

This section of the manual is for advanced usage of the module. The content is for advanced users with special requirements. Everything in this section is optional and not required for the daily usage of the module.

### 10.1 Transaction Object

This section describes how to extract information from a transaction, if you need it for further processing. E.g. you require more information of the transaction for further processing an order in your ERP system.

The code snippets in this section assume your script resides in the root folder of the shop with the default shop folder structure.

Have 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/worldpayjsoncw/init.php';
require_once 'plugins/worldpayjsoncw/lib/WorldpayJsonCw/Util.php';
Now you can load the transaction and then extract the transactionObject.
Load the transaction by Id:
$transactionById = WorldpayJsonCw_Entity_Util::loadTransaction
($transactionId);
```

\$transactionObject = \$transactionById->getTransactionObject();