

# Installation Manual for Concardis PayEngine 3.0 e-Commerce

This manual describes the installation and usage of the Concardis PayEngine 3.0 extension for e-Commerce.

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# 1 Introduction

This manual leads you through the installation, configuration and usage of the payment module for e-Commerce and Concardis PayEngine 3.0.

Before beginning with the installation, please make sure that you are in possession of all necessary data:

- Access to your merchant center account of Concardis PayEngine 3.0 (<https://merchanttest.payengine.de> for test and <https://merchant.payengine.de> for live) - On this platform you can download the access information.
- e-Commerce payment module from [sellxed.com/shop](https://sellxed.com/shop).
- Access to your server.

In case you don't yet have a contract with Concardis PayEngine 3.0, we please ask you to contact their support.

**Note that you must use at least PHP version 5.6 for our plugins. PHP 8 or higher is currently not supported.**

## 1.1 Process of the Installation

In this document you will find all important information for the installation of the module. It is important that you strictly follow the checklist. Only by doing so, can a secure usage in correspondence with all security regulations be guaranteed.

1. Configuration of the [basic settings](#) of the payment module
2. Configuration of the [payment methods](#)
3. Carrying out of a test purchase by means of the attached [test data](#) at the end of this document
4. If your test was successful, do not forget to switch the operating mode to live mode.

## 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 Concardis PayEngine 3.0 might not get through to the shop.



the Extranet of Concardis PayEngine 3.0 we ask you kindly to directly call the customer support of Concardis PayEngine 3.0.

## **2.2 Activation Payment Methods**

Once the main module is configured navigate to the payment methods and activate the payment methods that you want to process with.

## 3 Module Installation and Update in the e-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 [sellxed shop](#) (Menu "My Downloads Downloads"). In order to install the module in your shop, please carry out the following steps:

1. Download the plugin. The download can be found in your sellxed.com account under "My Downloads".
2. Unzip the archive you have just downloaded.
3. In the unzipped folder navigate to the folder "files"
4. For some shops there are different versions of the plugin provided. If this is the case open the folder which corresponds to your shop version.
5. Using your preferred FTP client upload **entire content** of this folder into the root directory of your shop. For some shops there is a specific folder containing the plugins. If that is the case upload the plugin into this folder. Make sure that the folders aren't replaced but merely merged.
6. If you haven't yet done so, log back into your shop.

### 3.2 Updates and Upgrades

You have direct and unlimited access to updates and upgrades during the duration of your support contract. In order to receive constant information about available updates we ask you to subscribe to our RSS feed that we publish for your module.

More information regarding the subscription of this RSS feed can be found under: [http://www.sellxed.com/en/updates\\_upgrades](http://www.sellxed.com/en/updates_upgrades).

We only recommend an update if something doesn't work in your shop, if you want to use new feature or if there is a necessary security update.

#### 3.2.1 Update Checklist

We ask you to strictly comply with the checklist below when doing an update:

1. Always do a backup for your database and your files in your shop
2. Use always a test system to test the update process.
3. Wait until all the files are copied to the shop, clear the cache if there is one in your shop and then visit the configuration page of the main module so that the update process will be initialized.

### Do not do updates directly in the live environment

Please test the update procedure first in your test shop. Our support team is able and willing to help you if you experience problems with the update process. However, if you decide to perform the update directly in your live shop there is the possibility of a downtime of the shop of more than two days depending on the availability of our support if you do not want to book our [complementary support](#).

Depending on the version it could be that the database has to be migrated. We recommend you therefore, to perform the updates in times when the shop is not visited too frequently by your customers.

### 3.2.2 Update Instructions

Please always read the update instruction. Those instructions can be found in the changelog. If there are no special remarks, you can proceed by just overwriting the files in your system.

## 4 Module Configuration in the 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.

### 4.1 Basic Module Configuration

Activate the plugin by selecting the module E-commerce Concardis PayEngine 3.0 in the **Plugin** menu.

The settings for the basic module can be found at **Concardis PayEngine 3.0 > Concardis PayEngine 3.0**. Fill out the fields, you should have already entered the necessary data in the Concardis PayEngine 3.0 backend or you received it as part of your correspondence with Concardis PayEngine 3.0. Each option is explained in more detail in a short info text in the shop.

### 4.2 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.

## 4.3 Direct Capturing of Transactions

The option "Capture" allows you to specify if you wish to debit payments directly or if you first wish to authorise them and then debit the payment at a later point.

Depending on your acquiring contract, a reservation is only guaranteed for a specific period of time. Should you fail to debit the payment within that period, the authorisation may therefore no longer be guaranteed. Further information on this process can be found below.

### Different settings between Concardis PayEngine 3.0 and the module

It may be that settings saved in the payment modules overwrite settings saved in Concardis PayEngine 3.0.

## 4.4 Uncertain Status

You can specifically label orders for which the money is not guaranteed to be received. This allows you to manually control the order before shipment.

### 4.4.1 Setting the order state

For each payment method you may select in which state the order should be set to depending on the booking state. This is the initial state of the order.

## 4.5 Optional: Validation

Note: It can be that this option is not visible in your module. In this case just ignore this section.

With the option 'Validation' you can define the moment when the payment method should be made visible to the customer during the checkout process. This setting is relevant for modules where the usage depends on the customer's compliance with specific preconditions. For example, if a solvency check has to be carried out or if the payment method is only available in certain countries. In order for the credit check or address validation to also work with European characters, the charset of the "Blowfish mode" must be set to "UTF-8" for certain PSP settings.

You have the choice between these options:

- **Validation before the selection of the payment method:** A validation verification is carried out before the customer selects the payment method. If the customer does not fulfill the requirements, the payment method is not displayed
- **Validation after selection of the payment method:** The verification of the compliance occurs after the selection of the payment method and before the confirmation of the order
- **During the authorisation:** The validation verification is carried out by Concardis PayEngine 3.0 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 Concardis PayEngine 3.0 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 Concardis PayEngine 3.0** 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 Concardis PayEngine 3.0' 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 Concardis PayEngine 3.0 are being blocked. In this case check the settings of your firewall and ask the Hostler to activate the IPs and User Agents of Concardis PayEngine 3.0.

#### 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 Concardis PayEngine 3.0 module.

### 6.1 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

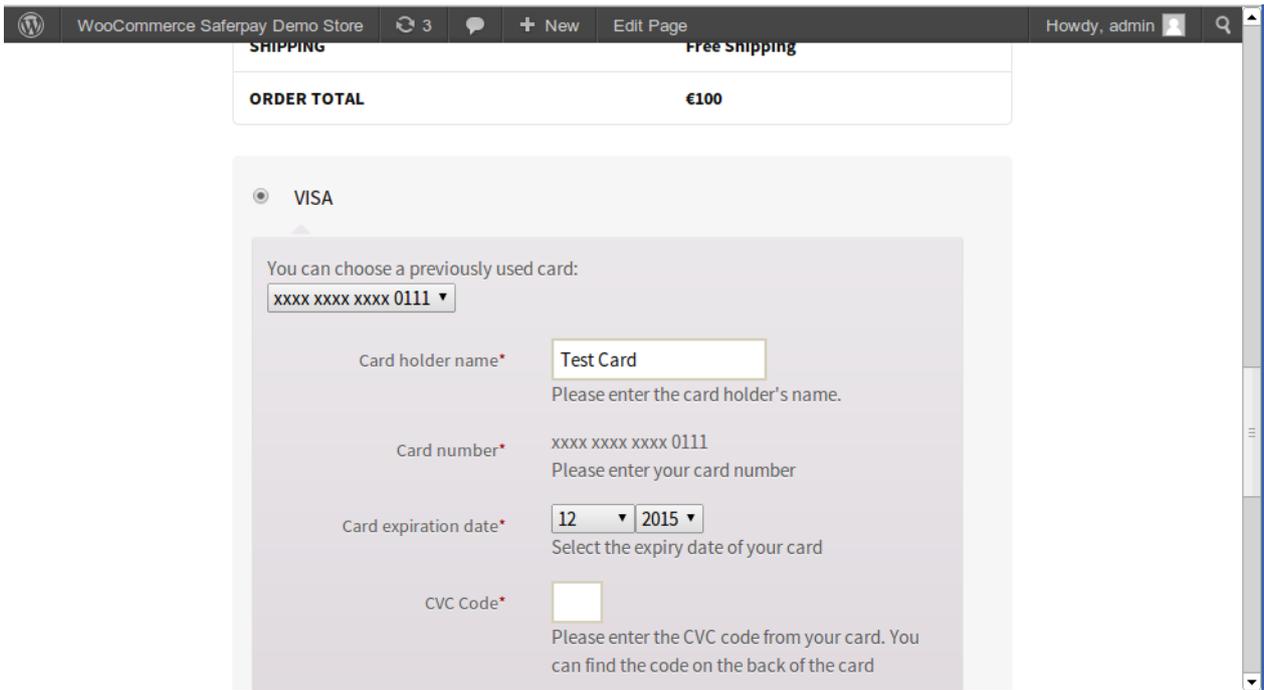
  

<b>Authorisation amount</b>	200.00
<b>Currency</b>	EUR
<b>Payment method</b>	Saferpay Test Card
<b>Payment ID</b>	dzhzlbUOMIGAYWG618AIWKp5MA
<b>Captured amount</b>	200
<b>Refunded amount</b>	200
<b>Transaction authorised</b>	Yes
<b>Transaction uncertain</b> ?	No
<b>Transaction captured</b>	Yes
<b>Transaction 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

Figure 6.1: Transaction information in WordPress E-Commerce.

### 6.2 Alias Manager / Token Solution Usage

The Alias Manager allows you to store your customers' credit card data safely with Concardis PayEngine 3.0. You can enable this by activating the option "Alias Manager" in the configuration of the [Payment Method](#). The customer can then select between the saved cards when making purchases in the future and does not have to enter all credit card data again.



**Figure 6.1:** Alias Manager in WooCommerce

### Alias Manager Options

In order to use the Alias Manager, the option has to be unlocked by Concardis PayEngine 3.0. Please contact the support service if you wish to activate the option.

## 6.3 Capture / Cancel Orders

### 6.3.1 Capturing and Cancelling Orders

In order to capture orders, open the order first (Dashboard > Store Sales) and then open the transaction information. Enter the amount you want to capture into the input field. By clicking on Capture the card is charged directly.

An order can be **cancelled** by clicking "Cancel Transaction" and the transaction as well as the reserved amount is released on the customer's card immediately.

#### Capturing Orders in the Concardis PayEngine 3.0 Backend

The transaction management between Concardis PayEngine 3.0 and your shop is not synchronised. When capturing payments in the Concardis PayEngine 3.0, the status is not adjusted in the shop and a second capture is not possible.

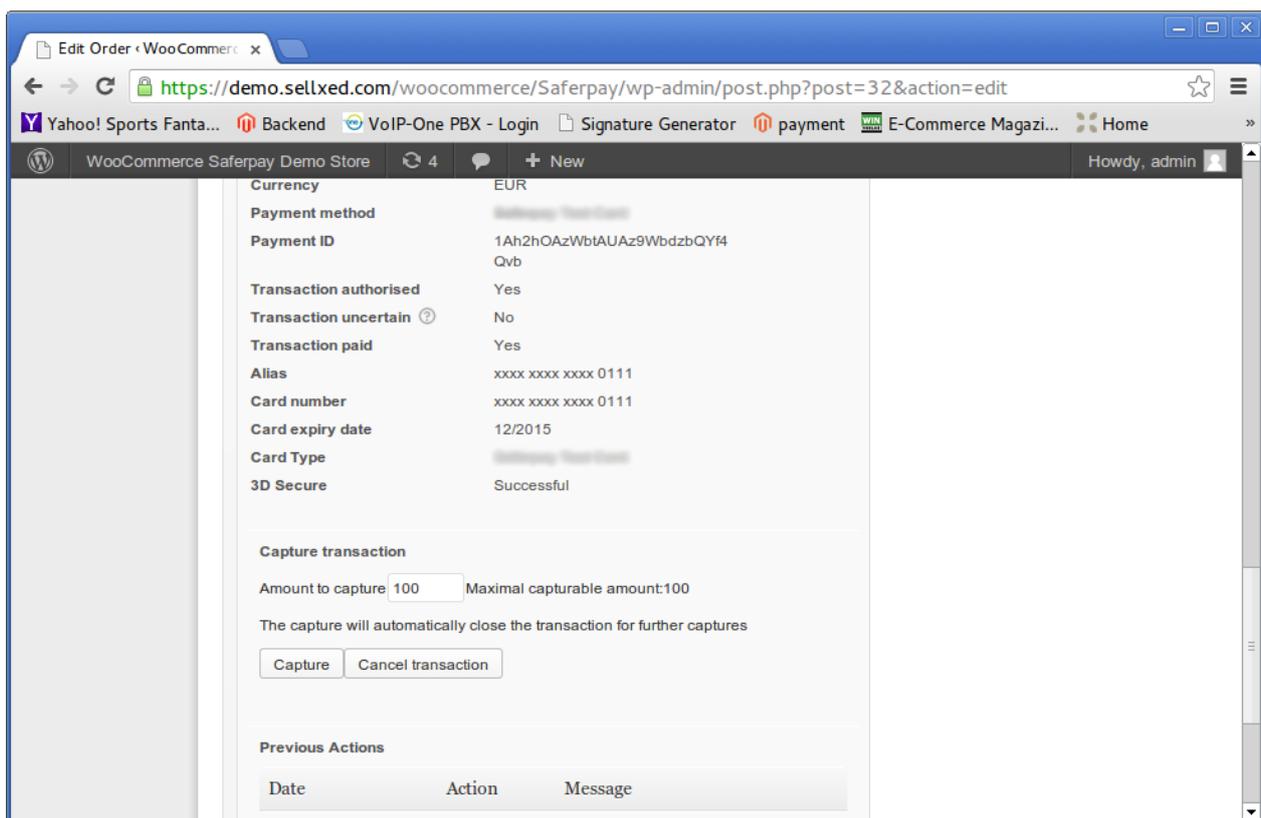


Figure 6.1: Cancelling and capturing orders

#### Partial Capturing

Please inquire, whether multiple captures are supported within your Concardis PayEngine 3.0 contract. Otherwise, partially captured transactions could be blocked from future captures.

## 6.4 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.

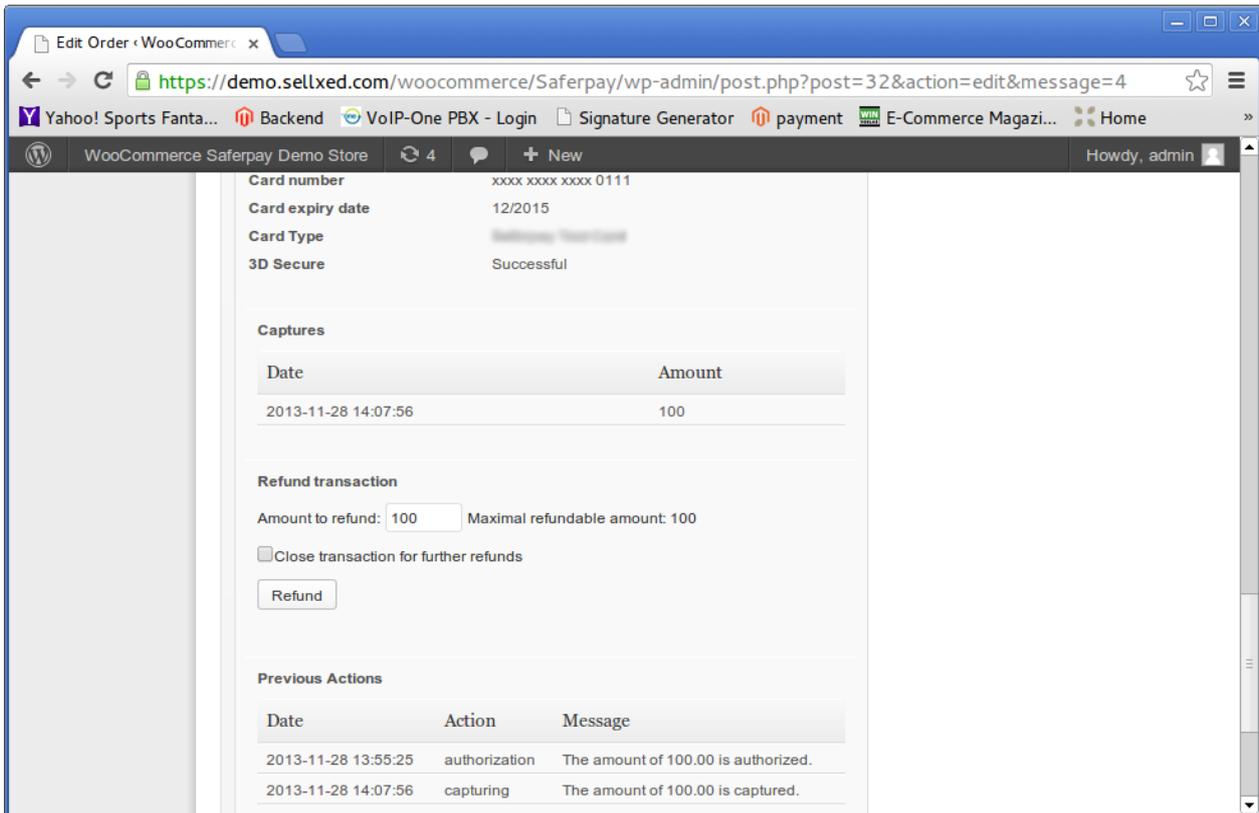


Figure 6.1: Refunds in WooCommerce for Concardis PayEngine 3.0.

### Maximum Refund

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

## 6.5 Transaction History

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

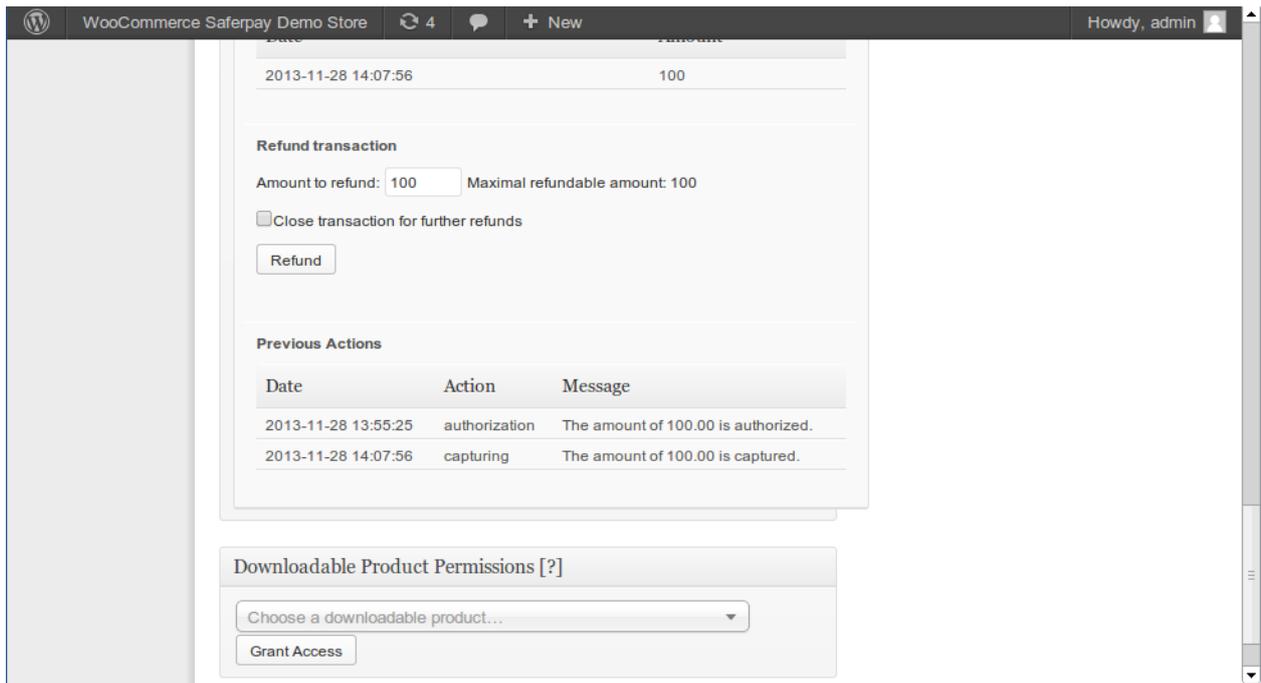


Figure 6.1: Transaction overview in the transaction history.

## 6.6 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 Concardis PayEngine 3.0 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](#).

## 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	5399 9999 9999 9999	MasterCard Standard
Expiry Date	12/2020	
CVC	123	
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
Card number	5404 0000 0000 0001	MasterCard 3D
Expiry Date	12/2020	
CVC	123	
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
Card number	4111 1111 1111 1111	VISA Standard
Expiry Date	12/2020	
CVC	123	
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
Card number	4000 0000 0000 0002	VISA 3D
Expiry Date	12/2020	
CVC	123	
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
Card number	3741 1111 1111 111	Amex
Expiry Date	12/2020	
CVC	1234	
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
Card number	3714 4963 5398 431	Amex Safekey
Expiry Date	12/2020	
CVC	1234	
Success Amount	1.00\$/€	

Failure Amount	1.11\$/€	
Card number	6400 0512 3456 7895	Maestro
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
Card number	4462 0300 0000 0000	VISA Debit
Expiry Date	12/2020	
CVC	123	
Success Amount	1.00\$/€	
Failure Amount	1.11\$/€	
<b>PayPal</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>giropay / paydirekt</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>SOFORT</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>RatePay Direct Debits</b>		
IBAN	DE12500105170648489890	Simulation IBAN for test order with settlement
BIC	INGDDEFFXXX	
IBAN	DE1511111111111111199	Simulation IBAN for test order
City	Testhausen	Ratepay Failure
Surname	Ablehnung	
<b>RatePay Open Invoice</b>		
City	Testhausen	Ratepay Failure
Surname	Ablehnung	
<b>iDEAL</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>Alipay</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>Bancontact</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>WeChat Pay</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>giropay</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>EPS</b>		
Failure Amounts	1.00/11.00/111.00\$/€	Simulation Failure Amounts
<b>PostFinance Card</b>		

Failure Amounts

1.00/11.00/111.00\$/€

Simulation Failure Amounts

## 8 Errors and their Solutions

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

### 8.1 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Concardis PayEngine 3.0 Referrer URL might appear in your Analytics Tool thus hiding the original traffic source. However, most Analytic Tools are able to minimize this problem.

In case you are using Google Analytics as reporting tool, this step by step guide may help you to exclude the URLs: [under bullet point 4](#).

## 9 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 Concardis PayEngine 3.0 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 logs folder of this plugin **wp-content/plugins/plugins/ecommerce\_payengine3cw/logs**. Please make sure the path exists and it is writable by the webserver.

## 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 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_payengine3cw/classes/PayEngine3Cw/Util.php';
```

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

Load the transaction by Id:

```
$transactionById = PayEngine3Cw_Util::getTransactionById($transactionId);
$transactionObject = $transactionById->getTransactionObject();
```

Load the transaction by the external Id:

```
$transactionByExternal = PayEngine3Cw_Util::getTransactionByExternalId($externalId);
$transactionObject = $transactionByExternal->getTransactionObject();
```

Load transactions by the order id:

```
$transactionsByOrder = PayEngine3Cw_Util::getTransactionsByOrderId($orderId);
foreach($transactionsByOrder as $transaction){
    $transactionObject = $transaction->getTransactionObject();
    //Do something with each object
}
```