Installation Manual for Datatrans e-Commerce

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

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1 Introduction

This manual explains the installation, configuration and usage of the payment module for e-Commerce and Datatrans.

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

- You should have received a Merchant ID from Datatrans for the test account (beginning with 1xxxxxxxx) as well as a Merchant ID for the live account (beginning with 3xxxxxxxx). Furthermore, you have received the corresponding user name and password
- e-Commerce payment module by sellxed.com/shop
- Access data to your server and shop

In case you don't yet have a contract with Datatrans, you can gladly acquire it directly through us.

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

1.1 Procedure 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 test administrative interface of Datatrans. You can find the test platform under https://admin.sandbox.datatrans.com/
2. Configuration of the basic settings of the payment module
3. Configuration of the payment methods
4. Carrying out of a test purchase by means of the attached test data at the end of this document
5. If the test was successful, copy all data of your test account into the live account of Datatrans. The live environment can be found under the following URL: https://admin.datatrans.com/

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 Datatrans might not get through to the shop.

2 Configuration Datatrans - Backend

For the configuration, log into Datatrans in the Payment Web Administration Tool:

- Test Environment: https://admin.sandbox.datatrans.com/
- Live Environment: https://admin.datatrans.com/

The settings carried out on the following pages are a precondition for the later configuration of the main module.

2.1 Configuration - UPP Administration

Under UPP Administration the settings for the feedback of Datatrans to the shop are defined.

The configuration of the feedback-URL plays a central role in the configuration of the module. Should the saved URLs not be correct, no feedback is returned to your shop. This leads to the payment not being processed correctly.

URL Successful, URL Failed, URL Cancel are all transmitted by our module. For this reason, enter **none** into the boxes.

For the **Transaction Feedback** please enter the URL that is generated in the main module. More information can be found under the section Transaction Feedback

Make sure that you did not tick the option "Cancel payment when Post-URL not available" and "Decline transaction with response code 02".

As an illustration we have added a screenshot:

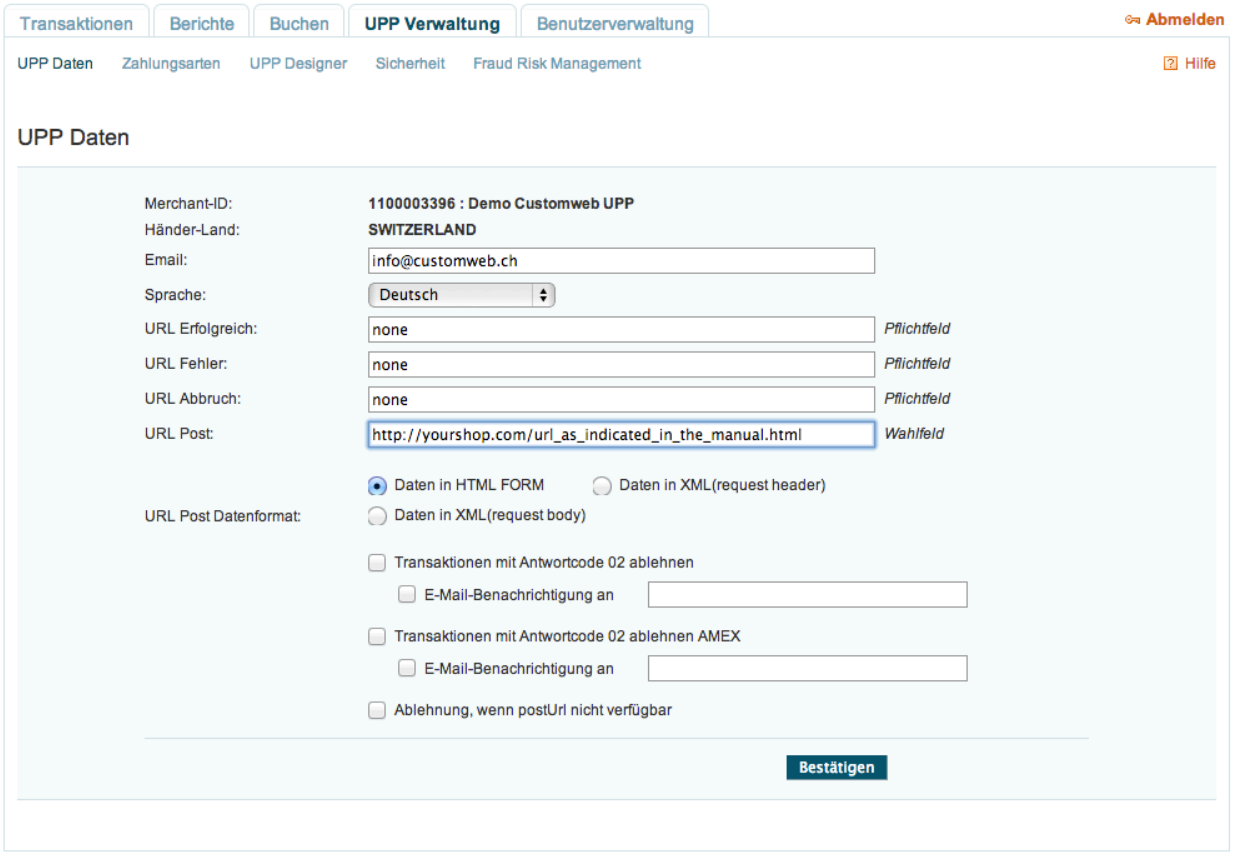


Figure 2.1: Configuration UPP Data.

2.2 Security - Configuration of the Sign-Parameters

The sign parameters are required in order to ensure the authenticity of the communication between Datatrans and your shop. It is not necessary to define the sign parameters, however, we strongly recommend carrying out the following settings.

Choose the HMAC-SHA256 Algorithm for the signature. By clicking on **generate new key**, a new sign will automatically be created. Enter this sign into the respective box within the main module and note it in a text file. You will require it for the later configuration.

We also recommend using a different **sign2-key**. Click on **generate new key** and note it down or copy it into the sign2-box in the main module.

Furthermore, we recommend ticking **Also sign settlement requests**.

As an illustration, please see the screenshot:

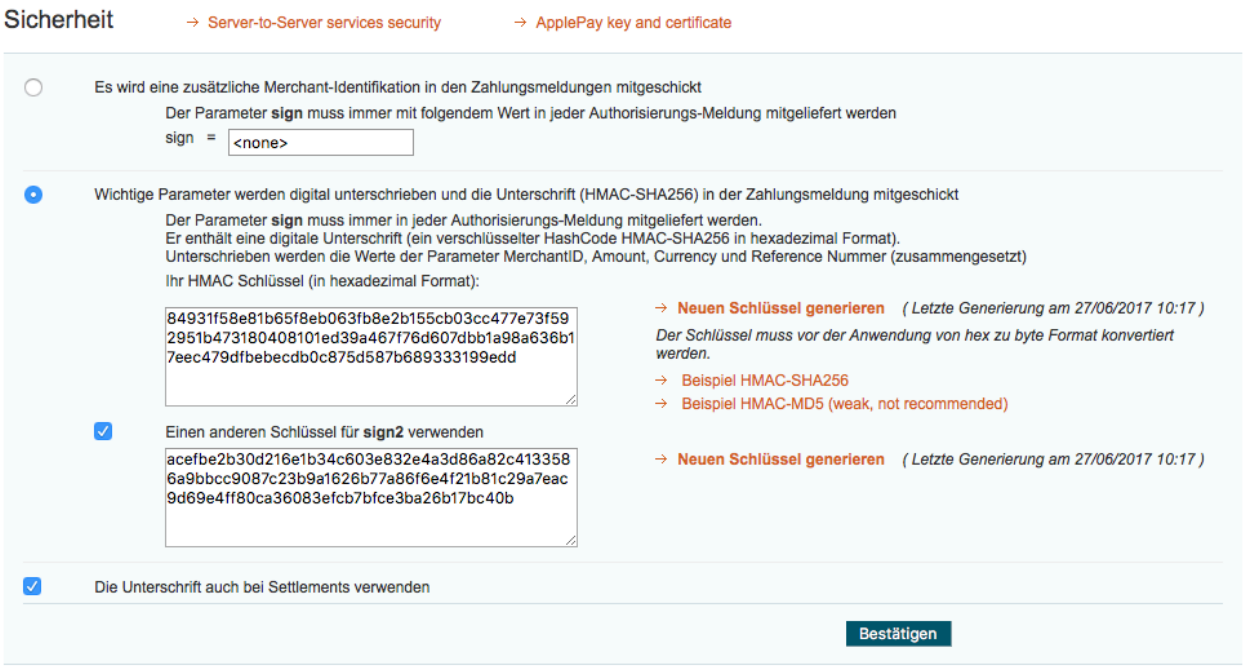


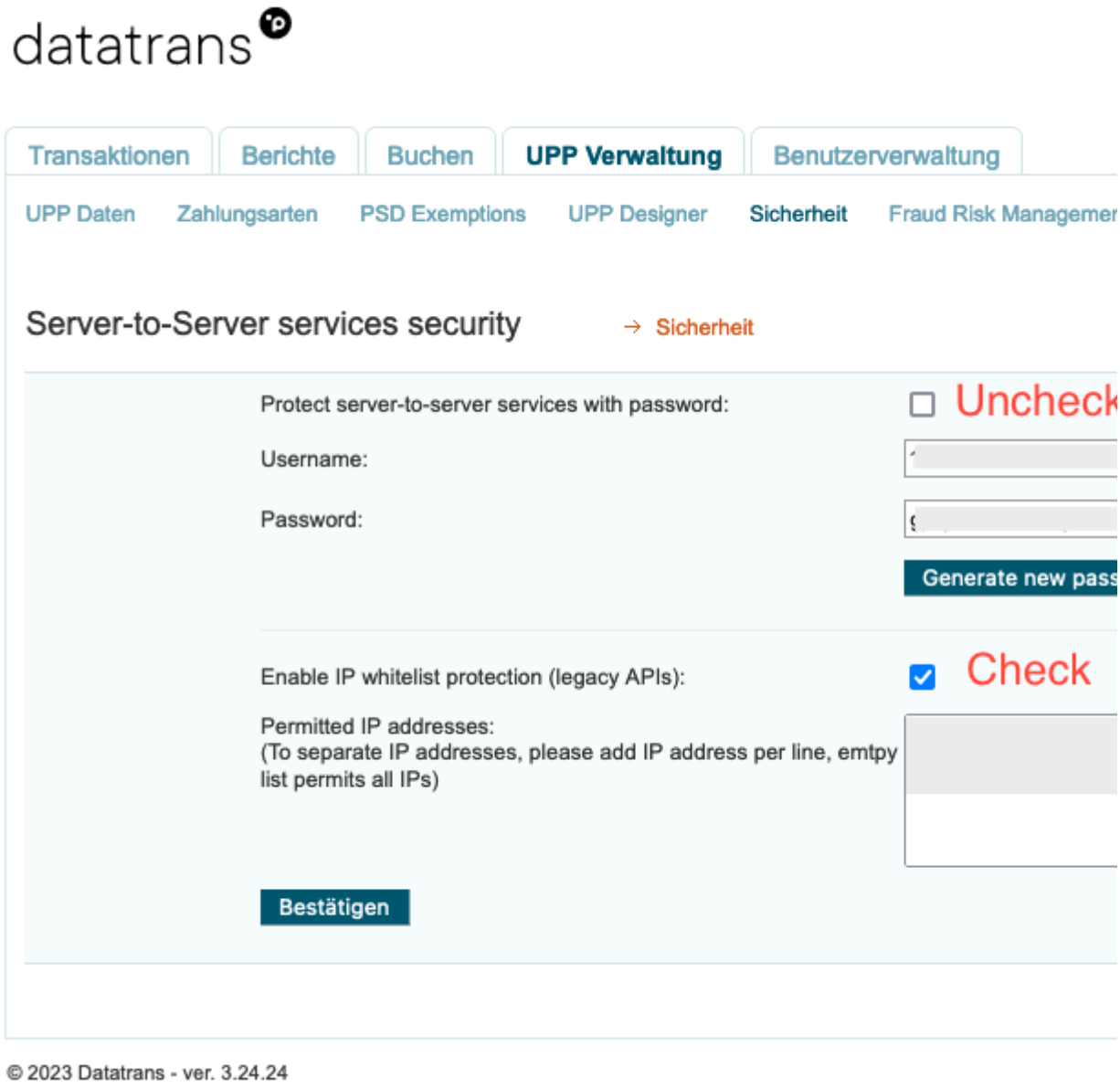
Figure 2.1: Configuration Security.

2.3 Security - Activation of the IP Whitelisting

We support the IP whitelisting option as authentication method to Datatrans. (Server-to-server protection with password we don't support)

To do this, remove the "Protect server-to-server services with password" option and enable the "Enable IP whitelist protection (legacy APIs)" option.

Then, in the "Permitted IP addresses" field, add the IP addresses of your shop/server that communicates with Datatrans:



2.4 Fraud Risk Management

Under the tab Fraud Risk Management you can exclude certain countries of origin of credit cards due to their risk management of payments. In this case, these credit cards will be refused by authorisation process of Datatrans.

2.5 Transactions

In the tab Transactions you can find an overview of effected transactions. You can authorise, debit or refund them directly. However, due to the integrated transaction manager of in all sellxed payment modules, you can also do this directly from within the shop. **Caution: If you debit payments here then the status is not synchronised with the shop. A renewed debiting in the shop will fail.**

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.

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 Datatrans in the **Plugin** menu.

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

4.2 Setting the Transaction Feedback URL

In order for payments to be processed in your shop you need to enter at least one Feedback URL in the Datatrans configuration. The URL can be found in your e-Commerce shop under: **Datatrans > Setup**.

4.3 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.

4.4 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 Datatrans and the module
>
> It may be that settings saved in the payment modules overwrite settings saved in Datatrans.

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

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.

5.3 OpenInvoice / Invoice via MFGroup or Swissbilling

With your Datatrans module you have now the possibility to process invoices via **MFGroup (POWERPAY)** or **Swissbilling**. To do so, activate as usual the payment method in your shop and select the the processor from the drop-down list.

Additionally you have the possibility to choose, if there should be a credit check in the background before the payment method display. And if the payment method should be hidden during a negative feedback. To be able to do so, the appropriate options have to be activated by Datatrans and the processor. Set under validation the right point in time. You have three options:

1. Before the selection of the payment method: This option enables you to process the credit check before the payment method display
2. After the selection of the payment method: The credit check is processed after the costumer has chosen a payment method, but didn't complete the order.
3. During the authorization: This is standard. The processing happens during the authorization by your Datatrans.

6 The Module in Action

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

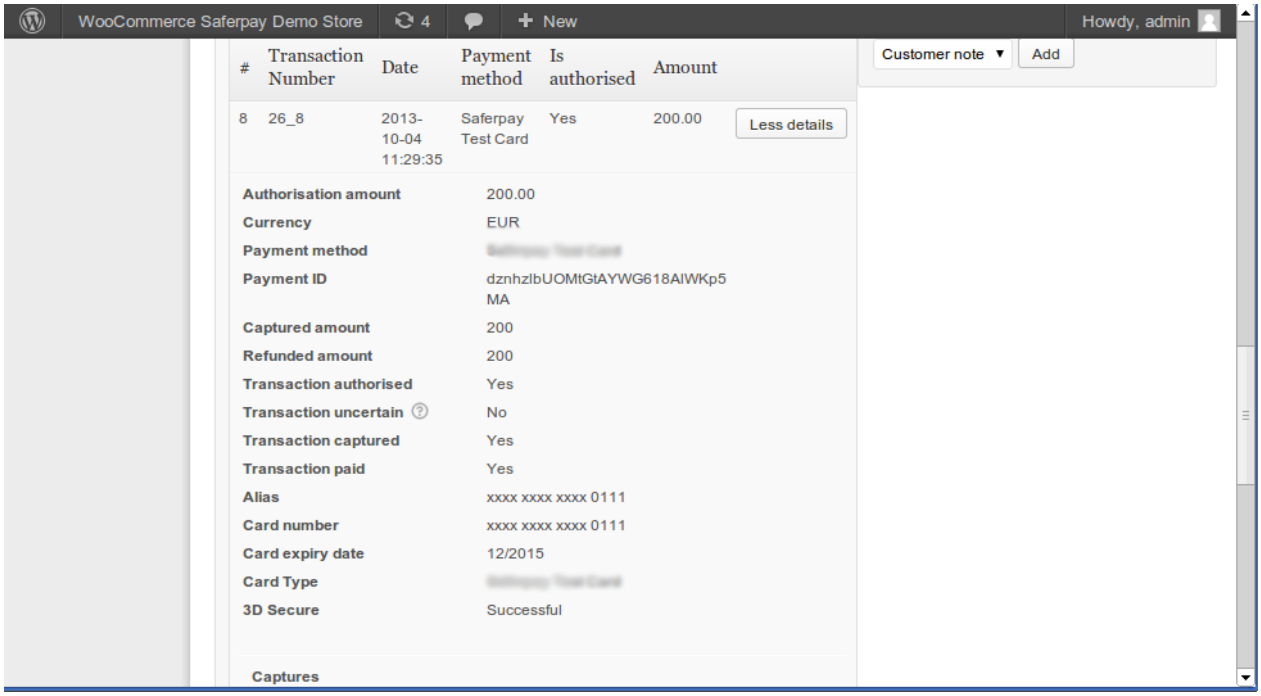


Figure 6.1: Transaction information in WordPress E-Commerce.

6.2 Alias Manager / Token Solution Usage

The Alias Manager allows you to store your customers' credit card data safely with Datatrans. 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.

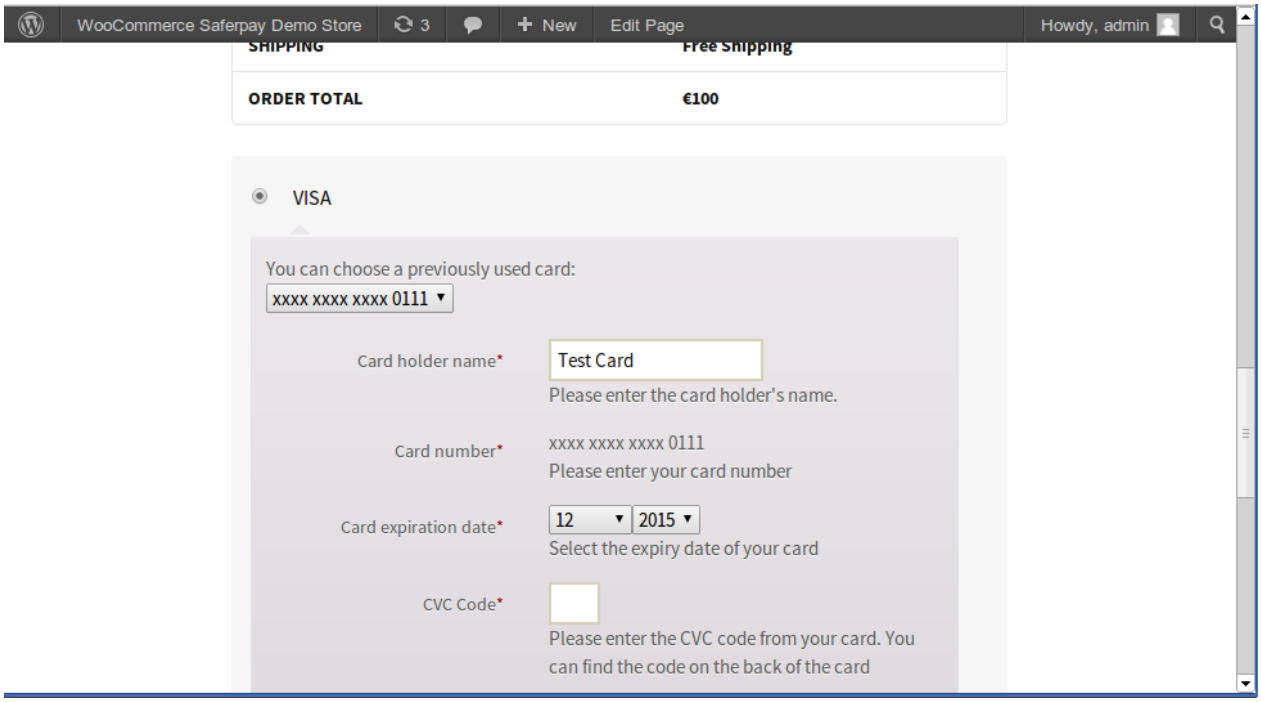


Figure 6.1: Alias Manager in WooCommerce

Alias Manager Options

In order to use the Alias Manager, the option has to be unlocked by Datatrans. 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 Datatrans Backend

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

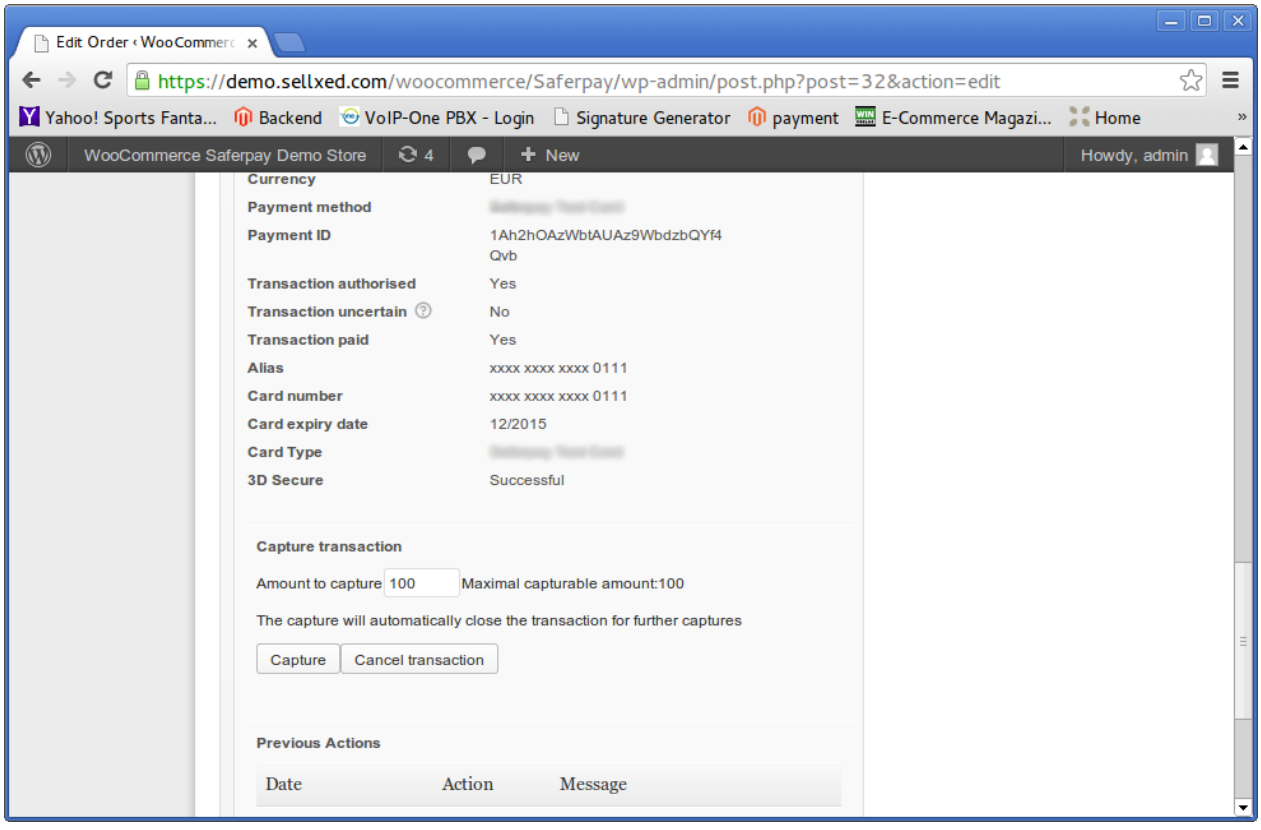


Figure 6.1: Cancelling and capturing orders

Partial Capturing

Please inquire, whether multiple captures are supported within your Datatrans 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.

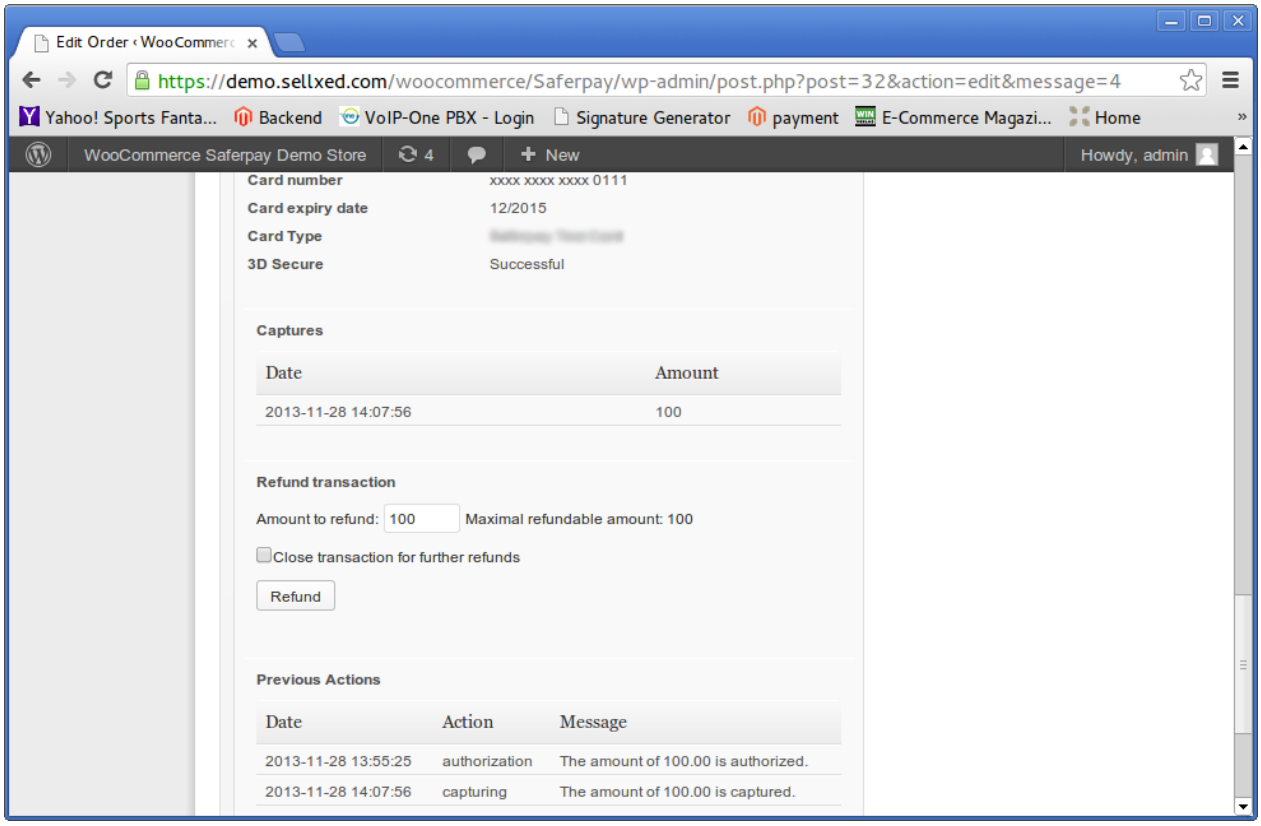


Figure 6.1: Refunds in WooCommerce for Datatrans.

> ### 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.

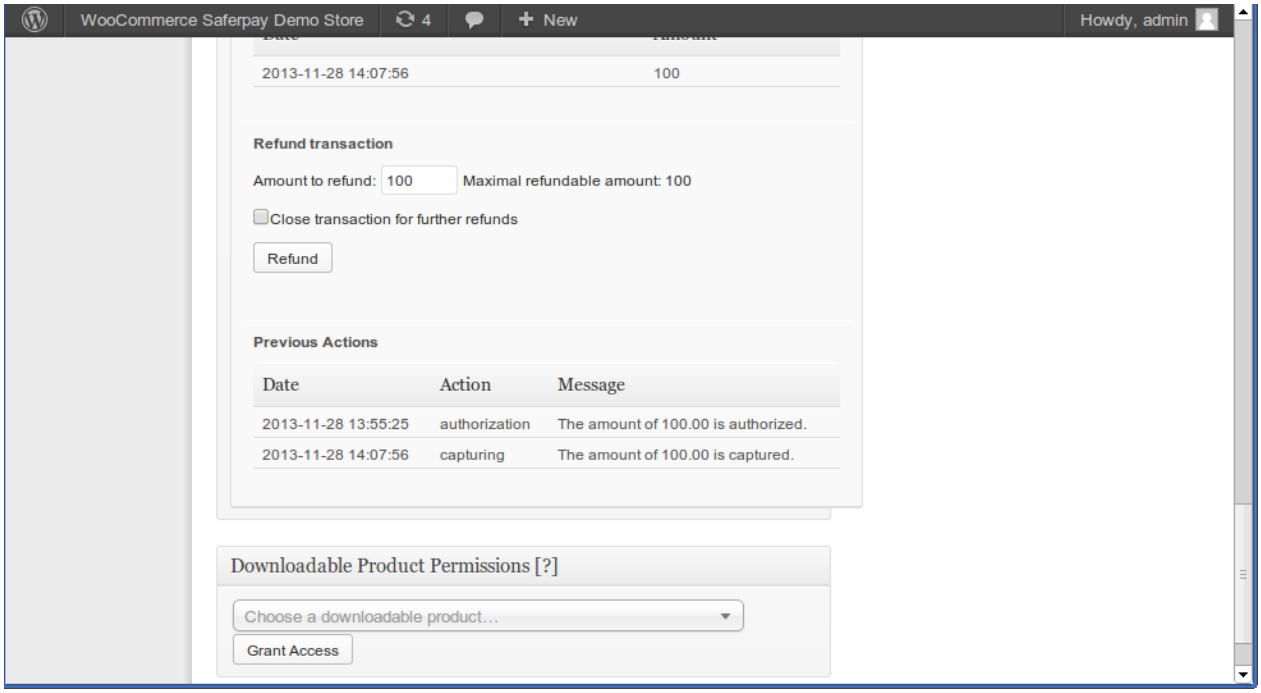


Figure 6.1: Transaction overview in the transaction history.

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 Datatrans 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	4900 0000 0000 0003	Visa: With 3-D Secure Check
Expiry Date	12/2021	
CVC	123	
Card number	5200 0000 0000 0007	MasterCard: Without 3D-Secure
Expiry Date	12/2021	
CVC	123	
Card number	5200 0000 0000 0080	MasterCard: With 3D-Secure
Expiry Date	12/2021	
CVC	123	
Card number	375000000000007	American Express: With 3D Secure
Expiry Date	12/2021	
CVC	1234	
Card number	3616 7719 110 012	Diners
Expiry Date	12/2021	
CVC	123	
Card number	3569 9900 1003 0400	JCB
Expiry Date	12/2021	
CVC	123	
Card number	6759 6498 2643 8453	Maestro UK
Expiry Date	12/2021	
CVC	123	

Visa

Card number	4900 0000 0000 0003	Visa: With 3-D Secure Check
Expiry Date	12/2021	
CVC	123	

MasterCard

Card number	5200 0000 0000 0007	MasterCard: Without 3D-Secure

Expiry Date	12/2021	
CVC	123	
Card number	5200 0000 0000 0080	MasterCard: With 3D-Secure
Expiry Date	12/2021	
CVC	123	

American Express

Card number	375000000000007	American Express: With 3D Secure
Expiry Date	12/2021	
CVC	1234	

Diners Club

Card number	3616 7719 110 012	Diners
Expiry Date	12/2021	
CVC	123	

JCB

Card number	3569 9900 1003 0400	JCB
Expiry Date	12/2021	
CVC	123	

Maestro UK

Card number	6759 6498 2643 8453	Maestro UK
Expiry Date	12/2021	
CVC	123	

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 Datatrans 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 Datatrans 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_datatranscw/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_datatranscw/classes
/DatatransCw/Util.php';
```

Now you can load the transaction and then extract the transactionObject.
Load the transaction by Id:

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

Load the transaction by the external Id:

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

Load transactions by the order id:

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