

Installation Manual for Intelligent Payments Modified Shop

This manual describes the installation and usage of the Intelligent Payments extension for Modified Shop.

Release Date: Mon, 07 Aug 2023 14:01:06 +0200
Version: 1.0.26

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1 Introduction

This manual describes the installation, configuration and the use of the payment module for Modified Shop and Intelligent Payments.

Before you begin with the installation, make sure you are in possession of all the necessary data. You will need:

- The Intelligent Payments Merchant ID
- Intelligent Payments password
- Modified Shop payment module by sellxed.com/shop
- Access data to your sever and your 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 Procedure

In this document you will receive all the necessary information needed for the installation of the module. It is important that you follow each step of the checklist carefully in order for the launch of the module to work. This is the only way to ensure the safe use in compliance with all safety regulations.

1. Configuration of the [Main Module](#)
2. Configuration of the accepted payment methods [Payment Methods](#) including the authorization method.
3. Performing a test order
4. Changing the operating mode to live

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 Intelligent Payments might not get through to the shop.

1.2 System Requirements

In general, the plugin has the same system requirements as Modified Shop. 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 Intelligent Payments

2.1 Configuration of the Main Module

For the configuration of the main module you need to enter the Merchant ID, the password and the country you are doing business from. You will receive this information directly from Intelligent Payments. Copy the access data directly into you shop into the corresponding field.

[Main Module](#).

2.2 Configuration of the Payment Methods

2.2.1 Activating the Payment Methods

After the installation you should be able to process payments in your shop via Intelligent Payments. Further information regarding the configuration of the payment methods and the meaning of each setting can be found [here](#).

2.2.2 Testing

When you have activated and configured the payment methods you can conduct a test by means of the published [test data](#). If the tests were successful you can switch the operating mode in the main module to **live**.

Now you can process payments.

3 Module Installation and Update in the Modified Shop 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 Modified Shop 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.

Admin Folder

Please change the Admin Folder back to "admin" if modified during the installation. Alternatively you can use a **not recommended** and **not update proof**solution, and modify our "hard coded" path strings. Please make sure to rename the "admin" folder of the module to exactly the same name on your webserver.

4.1 Configuration of the Main Module

You will find the settings for the module under **"Modules > (Export)-Modules > Intelligent Payments Base Module"**. Install the module and click on "Open Method Configuration". A new window should open up. Enter the individual options such as described above in the configuration of the administration interface of Intelligent Payments. Should one of the options not be clear to you, you can find further information by moving the cursor to the question mark. The most central settings are explained in more detail in this manual.

4.1.1 Create Pending Orders

You have the possibility of creating pending orders. In this case a temporary order will be created with the status "pending payment". This allows you to reserve the item in your shop and to transmit the identical order number as in the shop to Intelligent Payments. In the case when a customer cancels his or her purchase, the order remains in your shop - except if you activate the option "Remove cancelled orders". This makes sure that cancelled orders are deleted regularly. If

you do not wish to create pending orders, simply keep the default setting of xt:Commerce. However, this also means that the reference number (payment ID) with Intelligent Payments doesn't correspond to the order number in the shop. You are, however, free to use both options.

4.1.2 Database Encoding

If you haven't selected UTF-8 as a default for your database, this might lead to encoding problems with parameters with special characters. In this case you must select the option that data is UTF-8 encoded before being sent to Intelligent Payments.

4.1.3 Order Prefix

With the option order prefix you can define your own order scheme for the transmission to Intelligent Payments. This option is especially useful in a multi-store set up so that you can identify which shop a transaction in the back-end of Intelligent Payments belongs to. The tag "{id}" is automatically replaced by consecutive order numbers.

4.1.4 Order Prefix

With the option order prefix you can define your own order scheme for the transmission to Intelligent Payments. This option helps you identify to which shop a transaction the backend of Intelligent Payments is related to. The tag "{id}" will automatically be replaced by the consecutive order number.

4.2 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 Intelligent Payments and the module

It may be that settings saved in the payment modules overwrite settings saved in Intelligent Payments.

4.3 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.

4.3.1 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.

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

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.

5.2.3 Code Adjustments for the MasterPass Integration (xt:commerce SP 2.1)

In order for the button "Pay with MasterPass" to appear in the shopping cart when using external checkout with address transmission, the following adjustments in the code have to be made. If you prefer to simply use MasterPass as a regular payment method without address transmission, no changes are necessary.

The files containing the necessary code adjustments can be found in the zip files in /changes/*.txt. Please paste the codes contained in these files into the location described below.

5.2.3.1 Adjusting shopping_cart.php

Please copy the code snippet from the file /changes/shopping_cart.php.txt in front of the following code:

```
$smarty->assign('language', $_SESSION['language']); (ca. line 140)
```

5.2.3.2 Adjusting templates/[current-active-template]/module/shopping_cart.html

Please copy the code found in /changes/shopping_cart.html.txt in front of the **tag-`{/if}`**:

5.2.4 Further information

MasterPass with External Checkout cannot be used in combination with vouchers. If the customer wants to redeem a voucher, she has to go through standard checkout.

6 The Module in Action

Below you will find an overview of the most important features in the daily usage of the Intelligent Payments module.

Sprache:	german
Zahlungsweise:	XXXXXXXXXX_XXXXXXXXXX
Kreditkartentyp:	Mastercard (28_23)
Kreditkarteninhaber:	
Kreditkartennummer:	
Sicherheitscode (CVV):	
Kreditkarte läuft ab am:	

Figure 6.1: Transaction Information

6.1 Useful Transaction Information on the Order

You can find an overview of the transaction information in within the order detail view. Among others, this information allows for the definite attribution of the orders to their corresponding transaction, seen in the backend of Intelligent Payments.

Transaktionsnummer

Transaktions ID	12
Transaktionsnummer	9_12
Bestell ID	9
Erstellt am	2013-11-26 18:03:28
Erneuert am	2013-11-26 18:03:59
Kunden ID	1
Zahlungsid	25691316
Zahlungs-Klasse	XXXXXXXXXX0003
Autorisierungsbetrag	125
Währung	EUR
Zahlungsmethode	Visa
Zahlungsid	25691316
Verbuchter Betrag	125
Transaktion autorisiert	Ja
Transaktion ist unsicher 	Nein
Transaktion verbucht	Ja
Transaktion bezahlt	Ja
Akzeptanz	test123
Kartennummer	XXXXXXXXXXXX0003
Kartenablaufdatum	06/16
Händler Referenz	9_12

Figure 6.1: Transaction Information

6.2 Trigger Payments in the Modified Shop backend

With the Modified Shop payment module, orders can be triggered directly from within the shop, so called Mail Order / Telephone Order (MOTO).

1. Go to the customer overview and activate a customer. By clicking on "Create Order" a new window opens up for the creation of the order
2. Click on "Edit" and select the item and the options

3. In the field payment method you can select the preferred payment method and click on "Submit Order"
4. Depending on the authorisation method that you have saved for the selected payment method, you will either be redirected to the Payment Page of Intelligent Payments or the mask for the credit card will appear such as in the image below. Enter the credit card data of the customer

6.2.1 Refunding Orders

In order to refund orders, open the transaction information (cf. above). There you will find information on the transaction. Further below you will find an input field in which you can enter the amount you wish to refund. By clicking on "refund", the refund request will be transmitted to Intelligent Payments. You no longer need to log into the backend of Intelligent Payments.

Zurück

Teilgutschrift

Name	SKU	Typ	MwSt.	Menge	Total (exkl. MwSt.)	
Testartikel	ABC123	product	8 %	1	20.54	2
Selbstabholung (Selbstabholung der Ware in unserer Geschäftsstelle.)	shipping	shipping	0 %	1	0.00	0
					Total gutgeschriebener Betrag:	

Transaktion für weitere Rückvergütungen schliessen

Figure 6.1: refund button

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

6.3 Capturing / Cancelling of Orders

Please note

The transaction management between your shop and Intelligent Payments is not synchronised. If you capture payments with Intelligent Payments, the status in the shop will not be updated and a second capturing in the shop is not possible.

6.3.1 Capturing / Cancelling of Orders

In order to capture orders, open the transaction information (cf. above). There you will find information on the transaction. Further below you will find an input field in which you can enter the amount you wish to capture. By clicking on "capture", the capture will be transmitted to Intelligent Payments. You no longer need to log into the backend of Intelligent Payments.

By clicking on "Cancel Transaction" you cancel the transaction and the reserved amount is immediately released on the card of your customer.

Transaktion verbuchen

Betrag vergüten

Transaktion schliessen

 Ja, Transaktion schliessen

Transaktion abbrechen

Figure 6.1: capture oder cancel button.

6.4 Setup a Cron Job to Activate the Timed Operations

To activate the timed operations of the plugin (e.g. update service, deleting pending orders, etc.), please activate in a regular request to the file `intelligentpaymentscw_cron.php`. The regular call triggers the appropriate actions.

Here we suggest you use a Cron Engine like for example [EasyCron](#). That way you can This allows you to open the file (URL) with an external service.

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	4111 1111 1111 1111
Expiry Date	12/2030
CVC	111
Amount	Test with whole numbers in cart total amounts e.g. 10.00, 25.00 for transaction to be accepted

8 Errors and their Solutions

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

8.1 Payment methods are not displayed in the checkout

In case the payment methods are not shown in the checkout even though they have been enabled, then please change in the language file in the respective language folder (/lang/LANG /LANG.php) the following entry (on line nr. 50): `define('LANGUAGE_CURRENCY', 'EUR');`

Set here the default language currency code according to the default language settings in your shop.

8.2 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Intelligent Payments 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 Intelligent Payments settings.

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

9.2 Log Location

The log messages are visible in the Modified Shop backend under "**Modules > (Export)-Modules > Intelligent Payments Base Module > Log Messages**".

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 Modified Shop initialized in your script, this is required for the database connection.

```
include ('includes/application_top.php');
```

Include the module main file and module classes.

```
require_once DIR_FS_DOCUMENT_ROOT.'admin/includes/IntelligentPaymentsCw/init.php';
require_once DIR_FS_DOCUMENT_ROOT.'admin/includes/IntelligentPaymentsCw/classes/IntelligentPaymentsCw/Entity/Util.php';
```

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

Load the transaction by Id:

```
$transactionById = IntelligentPaymentsCw_Entity_Util::
findTransactionByTransactionId($transactionId);
$transactionObject = $transactionById->getTransactionObject();
```

Load the transaction by external Id:

```
$transactionById = IntelligentPaymentsCw_Entity_Util::
findTransactionEntityByTransactionExternalId($externalId);
$transactionObject = $transactionById->getTransactionObject();
```

Load transactions by Order ID:

```
$transactionsByOrderId = IntelligentPaymentsCw_Entity_Util::
findTransactionsEntityByOrderId($orderId);
foreach($transactionsByOrderId as $transaction){
    $transactionObject = $transaction->getTransactionObject();
    //Do something with each object
}
```