



# Installation & Admin user guide



LINK Joint Customer

# Introduction

This document covers the basic steps required to get the Ingenico Salesforce Cloud Commerce SDK with the reference implementation for Site Genesis installed on a sandbox.

## Requirements

### Account details

The details required from Ingenico's control panel are:

#### *Merchant IDs*

- Merchant ID

#### *API keys*

- API key ID
- Secret API key

#### *Webhook keys*

- Secret key

## Ingenico's Salesforce Commerce SDK

Download the module cartridge

## Installation steps

### 1. Import Site Genesis Demo site

Navigate to [Administration > Site Development > Site Import & Export](#), select *SiteGenesis Demo Site* and click import and confirm.

#### Site Import & Export

This page allows you to export the current configuration of your organization including all of its sites. To download an archive, just click its file name.

## Import

**Upload Archive:**  
☒ Local ☐ Remote

No file chosen

Select	Name ▲	Location	File Size	Last Modified
<input type="radio"/>	<a href="#">geolocation-sample.zip</a>	local	1,018.44 KB	3/3/17 3:02:24 pm
<input type="radio"/>	<a href="#">site-import.zip</a>	local	14.67 KB	1/31/18 7:43:06 am
<input type="radio"/>	<a href="#">site-preferences-plus-services.zip</a>	local	2.99 KB	7/26/17 5:02:22 am
<input checked="" type="radio"/>	SiteGenesis Demo Site			

## 2. Upload SDK customisation

Navigate to [Administration > Site Development > Site Import & Export](#), choose the file to upload *site\_import.zip* located in the *metadata* folder.

[Administration](#) > [Site Development](#) > Site Import & Export

### Site Import & Export

This page allows you to export the current configuration of your organization including all of its sites. To download an archive, just click its file name.

#### Import

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Select	Name ▲	Location	File Size	Last Modified
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<input checked="" type="radio"/>	<a href="#">site-import.zip</a>	local	14.67 KB	1/31/18 9:32:51 am
<input type="radio"/>	<a href="#">site-preferences-plus-services.zip</a>	local	2.99 KB	7/26/17 5:02:22 am
<input type="radio"/>	SiteGenesis Demo Site			

After upload completes, select *site\_import.zip* from the list and click import and confirm.

## 3. Upload SDK cartridges

The three cartridges that need to be uploaded into the sandbox are:

- int\_ingenico
- int\_ingenico\_feature
- bm\_ingenico

The code can be uploaded using WebDav on

[https://SANDBOX\\_URL/on/demandware.srvlet/webdav/Sites/Cartridges](https://SANDBOX_URL/on/demandware.srvlet/webdav/Sites/Cartridges) and in the relevant version. If the version chosen is not the active one, it needs to be activated before it can be used. Activation is done through the Code Deployment screen found in [Administration > Site Development > Code Deployment](#).

## 4. Update cartridge path

Prepend "*int\_ingenico\_feature:int\_ingenico:*" to Cartridges path on [Administration > Sites > Manage Sites > SiteGenesis - Settings](#) and [Administration > Sites > Manage Sites > SiteGenesisGlobal - Settings](#). This will make sure that the plugin code will be used by the two sites in SiteGenesis.

Click **Apply** to save the details. Click **Reset** to revert to the last saved state.

<b>Instance Type:</b>	Sandbox/Development
<small>Deprecated. The preferred way of configuring HTTP and HTTPS hostnames is by using new features of the site aliases configuration ("Site URLs/Aliases Configuration"). The HTTP/HTTPS hostnames values set in this section will be used if no hostnames are defined to support an older configuration style.</small>	
<b>HTTP Hostname:</b>	<input type="text"/>
<b>HTTPS Hostname:</b>	<input type="text"/>
<b>Instance Type:</b>	All
<b>Cartridges:</b>	int_ingenico_feature:int_ingenico:sitegenesis_storefront_controllers:sitegenesis_storefront_core
<b>Effective Cartridge Path:</b>	int_ingenico_feature:int_ingenico:sitegenesis_storefront_controllers:sitegenesis_storefront_core:plugin_apple_pay:plugin_facebook:plugin_pinterest_commerce:plugin_web_payments:core

The path once prepended should look like below in all lowercase.

`int_ingenico_feature:int_ingenico:sitegenesis_storefront_controllers:sitegenesis_storefront_core`

[Administration](#) > [Sites](#) > [Manage Sites](#) > Business Manager - Settings

**Settings**

Cache Hostnames

## Business Manager - Settings

Click **Apply** to save the details. Click **Reset** to revert to the last saved state.

<b>Instance Type:</b>	Sandbox/Development
<small>Deprecated. Up to two instance specific hostname aliases for Business Manager can be configured here.</small>	
<b>HTTP Hostname:</b>	<input type="text"/>
<b>HTTPS Hostname:</b>	<input type="text"/>
<b>Instance Type:</b>	All
<b>Cartridges:</b>	bm_ingenico:int_ingenico:int_ingenico_feature:sitegenesis_storefront_core

The business manager path in [Administration](#) > [Sites](#) > [Manage Sites](#) > [Business Manager - Settings](#) also needs changing to include the business manager plugin as below.

`bm_ingenico:int_ingenico:int_ingenico_feature:sitegenesis_storefront_core`

### 5. Set API site preferences

Select a website from the list on the top left to add the API details in the site custom preferences. Once selected, navigate to [Merchant Tools](#) > [Site Preferences](#) > [Custom Site Preference Groups](#) > [Ingenico API Credentials](#) and fill in all the relevant fields, select the platform (*Global Collect - WW* and *EU* - or *Ogone - EU only*) and the environment.

salesforce Sandbox - schow SiteGenesis

Merchant Tools Administration Storefront Toolkit Beta

Merchant Tools / Site Preferences / Custom Site Preference Groups /

### Ingenico API Credentials

Cancel Apply to Other Sites Save

Instance Type  
Sandbox

Search by IDs...

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Name	Value	Default Value
API Environment	None	<a href="#">Edit Across Sites</a>
API Platform	None	<a href="#">Edit Across Sites</a>
Merchant ID*		<a href="#">Edit Across Sites</a>
API Key ID		<a href="#">Edit Across Sites</a>
API Secret Key		<a href="#">Edit Across Sites</a>
Webhook Secret Key		<a href="#">Edit Across Sites</a>

When using webhooks to get status updates, the URL used to receive the updates is specific to each site and account. The format of the URL is as shown below.

<https://DOMAIN/on/demandware.store/Sites-SITENAME-Site/LANGUAGE/Ingenico-Feedback>

The *DOMAIN* is the one that links to the instance (sandbox, staging or production). *SITENAME* refers to the name as shown in Business Manager for each site. *LANGUAGE* is one of the locals that are allowed on the specific site as defined in [Merchant Tools > Site Preferences > Locales](#).

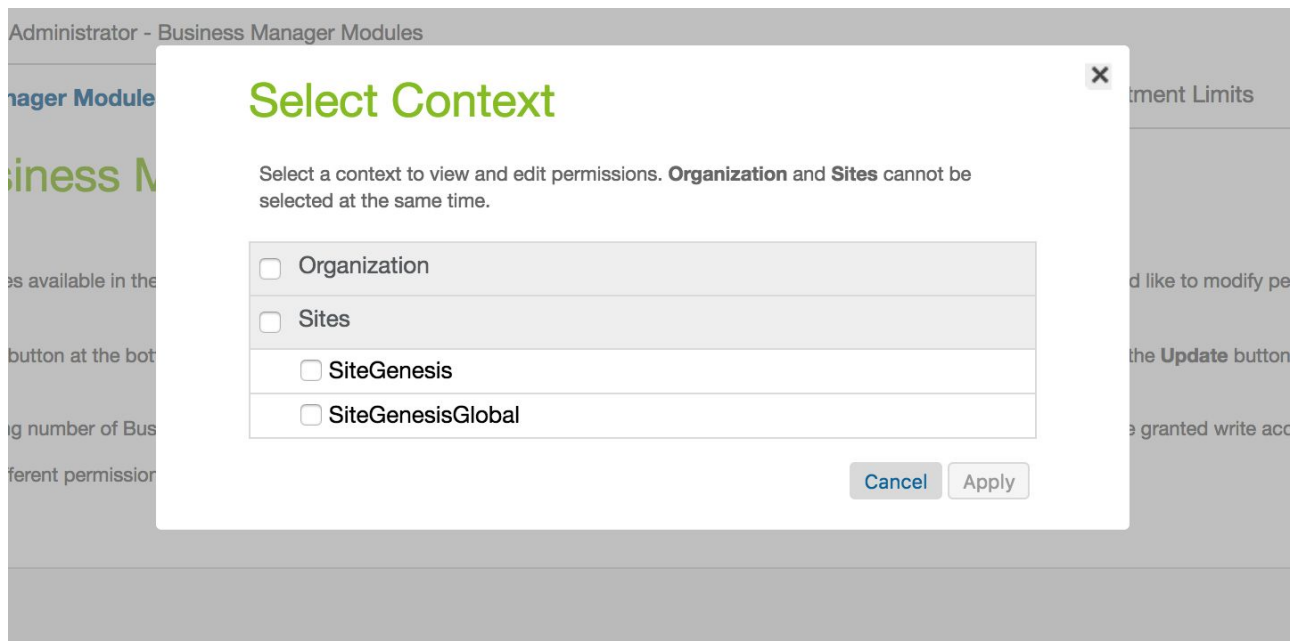
*NOTE: The API platform location won't fail over automatically. In the event of the selected region cluster not being available, if the relevant platform supports it, you can switch to use the other region cluster.*

*NOTE: There is a one to one mapping between webhook URL, Ingenico account, Demandware site and orders. Orders placed in one site, need to receive the update on the specific URL for that site.*

## 6. Update role permissions

In order to manage the pending, a role needs to be given the permission *Orders (Action pending)* to do so. The instructions below explain how to give the permission to the Admin role.

Navigate to [Administration > Organization > Roles > Administrator - Business Manager Modules](#). When selecting the Business Manager module, select all sites from the pop-up window that will appear.



Scroll until the Orders section where you will find *Orders (Action pending)* . Tick the box and save the settings.

[Administration](#) > [Organization](#) > [Roles](#) > Administrator - Business Manager Modules

[General](#) [Users](#) [Business Manager Modules](#) [Functional Permissions](#) [WebDAV Permissions](#) [Locale Permissions](#) [Price Adjustment Limits](#) [Customer Service Center Permissions](#)

## Administrator - Business Manager Modules

This list shows all Business Manager modules available in the system for which permissions can be granted. Click **Change Context** to select the context for which you would like to modify permissions. Available context options are the organization, one site or multiple sites.








Select the checkboxes and use the **Update** button at the bottom of the page to grant permissions to certain Business Manager modules. Deselect the checkboxes and use the **Update** button to revoke permissions to specific Business Manager modules.

Read access may be granted to an increasing number of Business Manager modules. Write access includes read access. To remove read access, please be sure to not have granted write access for the respective feature.

When multiple contexts are selected with different permissions for a feature or module, detailed information can be viewed by clicking in the "Details" column.

**Selected Context:** SiteGenesis, SiteGenesisGlobal

[Select Context](#)

		Read	Write
Business Manager Module	Module Description		
 <b>Products and Catalogs</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 <b>Products</b>	Manage the products of the organization. Note: Due to the relation between Products and Product Sets, it is not possible to combine Read and Write access between these two modules. Please note that for read-only access across the entire Products module the functional permissions Manage_Site_Catalog, Manage_Site_PriceBooks, and Manage_Site_Inventory are required in the site context. For full write access, the additional Organization-level functional permission Manage_All_Catalogs is required.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
.....			
 <b>Ordering</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 <b>Orders (Action pending)</b>	Orders that require attention		<input checked="" type="checkbox"/>
 <b>Orders</b>	Manage the orders of this site. Please note that for read-only access across the entire Orders module the functional permission Delete_Order_Note is required in the site context.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
.....			
 <b>Customer Service Center Preferences</b>	Manage the Customer Service Center preferences for this site.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 <b>Apple Pay</b>	Manage Apple Pay configuration.		<input checked="" type="checkbox"/>
		<a href="#">Reset</a>	<a href="#">Update</a>

[<< Back to List](#)

## Other configuration

Other than the API credentials, you can configure other settings per site. These are group in 2 sections for easier access.

### *Ingenico Configuration*

These are accessed from [Merchant Tools > Site Preferences > Custom Site Preference Groups > Ingenico Configuration](#).

Title	Description
Card approval before capture	Approve authorised cards before capture. If set to false, amount will be captured when authorised.
Skip 3D Secure verification	Skip Verified by VISA, MasterCard SecureCode, AMEX SafeKey, etc.
Enable transaction logs	Enable logging of all responses from the API against a booking. This is different to service logs provided by Demandware.
Tokenise Credit Card number	If enabled, credit card number will be masked and a token will be used instead.
Notify Fraud Manager	If enabled, it will send an email notifying them of every transaction flagged for manual Fraud Check.
Fraud Manager's email address	The email address that will receive all the fraud manager notifications.
Descriptor	Text that will appear in the customer's statement or during 3rd party checkout.

### *Ingenico Email Configuration*

These are accessed from [Merchant Tools > Site Preferences > Custom Site Preference Groups > Ingenico Email Configuration](#).

The settings below will send an email when the specific status is received from the payment gateway. To modify the content of the email, it can be done by updating the template or the resource file depending if you need to change the HTML or just the text header and subject line. The templates are located inside [int\\_ingenico/cartridge/templates/default/mail](#) and the text is located in the resource file [int\\_ingenico/cartridge/resources/ingenico.properties](#).

Title	Template used
Send Email For Fraud Status	order_paymentpending
Send Email For Pending Approval Status	order_paymentpending
Send Email For Paid Status	order_paymentreceived
Send Email For Redirected Status	order_paymentredirected
Send Email For Waiting for payment	order_paymentpending
Send Email For Failed Transactions	order_paymentrejected

### Demandware Logs

Demandware (Salesforce Commerce Cloud) provides a set of logs that can be accessed through [Administration > Site Development > Development Setup](#) in the Log Files section. The service-IngenicoSvc-\*-YYYYMMDD.log file stores the requests and responses to the gateway. To enable this you need to go to [Administration > Operations > Custom Log Settings](#) and set the *root* Log Category to DEBUG and tick all the Log files including DEBUG.

### Custom Log Filters

Active	Log Category	Log Level
	<input type="text" value="Enter a log category..."/>	WARN
	root	DEBUG

### Custom Log Targets

**Email:** Messages with log level FATAL can be sent to email recipients.

**Log Files:** Select which log levels should be written to files:

- ☒ FATAL
- ☒ ERROR
- ☒ WARN
- ☒ INFO
- ☒ DEBUG

**Log Center:** Messages that pass the filters are sent to the log search application.



*NOTE: The DEBUG mode cannot be set in production.*

## Admin actions

Through the business manager, the authorised users can perform actions to approve, reject, refund, cancel transactions linked to an order. These actions are accessed from two places.

### Dedicated approval screen

The screen is accessed through [Merchant Tools > Ordering > Orders \(Action pending\)](#). The image below is an example of the screen. From there you can select to view at orders pending Fraud Approval or orders that require manual Approval. The actions performed on both are the same: approve order to move to the next step of the transaction or reject/cancel the transaction which will cancel the order too.

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FRAUD APPROVAL

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APPROVAL

Orders Pending Fraud Approval

Order	Date	Customer	Products		Billing Address	Shipping Address	Total	Action
<a href="#">00009044</a>	Tue, 29 Aug 2017 14:27	T Test demandware-test@ataclick.net	Charcoal Flat Front Athletic Fit Shadow Striped Wool Suit x 1	314.99	high street, , Beverly hills, 90210, us	high street, , Beverly hills, 90210, us	\$ 262.48	<div>Approve</div> <div>Reject/Cancel</div>
<a href="#">00009045</a>	Tue, 29 Aug 2017 14:57	T Test demandware-test@ataclick.net	Charcoal Flat Front Athletic Fit Shadow Striped Wool Suit x 1	314.99	high street, , Beverly hills, 90210, us	high street, , Beverly hills, 90210, us	\$ 262.48	<div>Approve</div> <div>Reject/Cancel</div>

### Order payment screen

When viewing an order ( [Merchant Tools > Ordering > Orders](#) ) you can see the payment details from the *Payment* tab. Depending on the payment status, cancel the transaction, create multiple refunds, cancel existing pending refunds, and request a payment status update from the gateway. *(Note: if the gateway details change from when the order was placed, this will not work)*

Payment Information for Order '00015203'

Order Total:	\$262.48
Amount Paid:	\$0.00
Balance Due:	\$262.48

Invoice Number:	
Payment Status:	Not Paid

Payment Method:	CREDIT_CARD Processor: INGENICO_CREDIT Transaction: 000000224710000010570000100001 Amount: \$262.48	Billing Address:	N Test N High street Bel Air Beverly hills CA 90210 us
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**Payment Information**

Last checked status: **CAPTURE\_REQUESTED**  
Payment status last checked: 2017-10-28 15:32  
Payment status last changed: 20171028173246  
Payment method: MasterCard 0007  
Card auth code: 654321

REJECT/CANCEL

UPDATE STATUS

**Refund Information**

Total refunded: \$0.00  
Total available to refund: \$262.48

There are no refunds for this payment.

Payment requested but not confirmed yet

Payment Information for Order '00014302'

Order Total:	\$31.48
Amount Paid:	\$0.00
Balance Due:	\$31.48

Invoice Number:	00057501
Payment Status:	Paid

Payment Method:	HostedPay Processor: INGENICO_HOSTED Transaction: 000000224710000010130000100001 Amount: \$31.48	Billing Address:	Sebastian Chow 8a Great Newport St London TN 38104-3503 us
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**Payment Information**

Last checked status: **PAID**  
Payment status last checked: 2018-02-07 12:29  
Payment status last changed: 20171017201942  
Payment method: Visa  
Card auth code: 654321

NEW REFUND

UPDATE STATUS

**Refund Information**

Total refunded: \$1.48  
Total available to refund: \$30.00

Last checked	Last changed	Amount	Status	Actions
2018-02-07 12:29 UTC	20180207132900	\$1.48	REFUND_REQUESTED	<div><div>CANCEL</div><div>UPDATE STATUS</div></div>

Payment confirmed. One refund against the transaction

HostedPay  
Processor: INGENICO\_HOSTED  
Transaction: 000000224710000010130000100001  
Amount: \$31.48

### Payment Information

Last checked status: **PAID**  
Payment status last checked: 2018-02-07 12:26  
Payment status last changed: 20171017201942  
Payment method: Visa  
Card auth code: 654321

NEW REFUND

UPDATE STATUS

### Refund Payment

Amount

1.48

Reason

Refund shipping

CANCEL

SUBMIT

Sebastian Chow  
8a Great Newport St  
London TN 38104-3503  
us

Create refund

## Further Information

To find out more about how to use the SDK in your own project, change text and templates please refer to the *Technical Implementation* document.