



SkyBank Financial's Advanced Payment Module Documentation



INTRODUCTION

The SkyBank Advanced Payment Module for PrestaShop is the most advanced payment module available in the Addons Store. The solution we have designed for PrestaShop includes the ability to:

- Accept credit and debit cards as well as ACH debits (electronic check) online
- Void transactions and issue refunds directly from your back office
- Allow customers to create and manage auto-ship orders as well as update delivery frequency online
- Manage, update and cancel auto-ship orders from your back office
- Set the default order status by payment type
- Switch settlement modes between authorization only or sale upon order
- Capture authorization only transactions directly from your back office

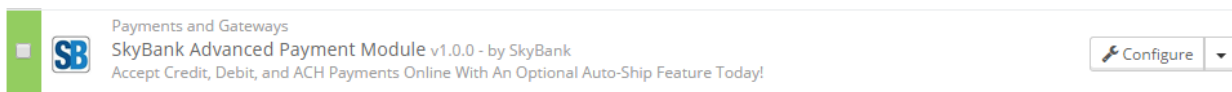
INSTALLING THE MODULE

In order to install the SkyBank Advanced Payment Module, simply search for SkyBank in the Addons Store and click install.

NOTE: If you elect to use the optional auto-ship functionality, you will also need to install the Cron Tasks Manager Module provided by PrestaShop. Simply search for "Cron Tasks Manager" in the Addons Store and click install.

CONFIGURING THE SKYBANK ADVANCED PAYMENT MODULE

Once you have installed the SkyBank Advanced Payment Module, simply click the "Configure" button, which will take you to the configuration page.



CONFIGURE YOUR PAYMENT DETAILS

UserName: 1

Password: 2

Vendor Number: 3

Auto-Ship Settings

☒ Enabled 4
☐ Disabled

Default Order Status

Cards 5

Check

Credit/Debit Card Settings

☒ VISA ☒ MasterCard ☒ American Express ☒ DISCOVER ☒ JCB ☒ Diners Club 6

Default Credit/Debit Transaction Mode

☒ Sale 7
☐ Authorize Only

Electronic Check Settings

***Separate ACH Account Approval Required. Not Sure Call? 1-800-815-0935**

☒ Enabled 8
☐ Disabled
☐ Require Drivers License Number

Cron

Unique Cron Url :
<http://yoursite.com/16/modules/skybankaim/cron.php?token=74b0283c782f6e4416df4755fc233447> 9

1. This is your API username that will be provided by SkyBank Financial upon account approval.
2. This is your API password that will be provided by SkyBank Financial upon account approval.
3. This is your API vendor id that will be provided by SkyBank Financial upon account approval.
4. This setting allows you to enable or disable Auto-Ship functionality. Please note, auto-ship is only supported on Credit/Debit transactions at this time and requires the Cron Tasks Manager Module.
5. This setting allows you to select your default order status by payment method.
6. This setting allows you to select which card types you wish to display on your Front Office. Please note, all card types will be enabled at the processor level unless otherwise requested.
7. This setting allows you to select the default credit/debit card transaction mode.
 - a. A Sale Transaction will authorize and capture the transaction in one step.
 - b. An Authorize Only transaction will put a hold on a card. You will have to Capture the transaction in a second step in order to settle to your bank account.
8. This setting allows you to select whether you wish to display ACH transactions in the Front Office. Please note, this feature requires separate account approval. If you enable this feature without separate approval, customers will receive decline notifications when processing a payment.
9. This is your Unique Cron URL. If you elect to use the optional auto-ship you will need to install a Cron Tasks Manager Module from the Addons Store. Please note, SkyBank recommends the Cron Tasks Manager Module by PrestaShop and we have provided support for this recommendation below, however you can use any Cron Manager that is available in the Addons Store.

CONFIGURING THE CRON TASKS MANGER MODULE

Once you have installed the Cron Tasks Manager Module, simply click the “Configure” button, which will take you to the configuration page.



Administration

Cron tasks manager v1.1.8 - by PrestaShop

Manage all your automated web tasks from a single interface.

Cron mode ☒ Basic

Use the PrestaShop cron tasks webservice to execute your tasks.

☐ Advanced

For advanced users only: use your own crontab manager instead of PrestaShop cron tasks service.

1. Select Basic Cron mode
2. On the bottom right, click the + sign to Add New Cron Task

Description

Enter a description for this task.

Target link

Set the link of your cron task.

Frequency

At what time should this task be executed ?

On which day of the month should this task be executed ?

On what month should this task be executed ?

On which day of the week should this task be executed ?

1. Enter “Auto-Ship CRON Manager” as description.
2. Copy and paste the Unique Cron URL from your SkyBank Advanced Payment Module configuration page into the Target link.
3. Setup the Frequency on when you would like to run the automated billing program. Please note, we recommend using the default settings listed above.







CRON TASKS 1								
Description	Target link	Hour	Day	Month	Day of week	Last execution	One shot	Active
Auto-Ship CRON Manager	https://makeupaddict.me/16/modules/skybankaim/cron.php?token=74b0283c782f6e4416df4755fc233447	23:00	Every day	Every month	Every day of the week	Never	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Edit

Once you have configured the settings above, simply check the box to make the Cron Task Active.







FRONT OFFICE

Below is the view that your customers will see when they are at the payment screen. They can click on either payment method to process a payment for an order.







3 PLEASE CHOOSE YOUR PAYMENT METHOD

    	Pay by Credit/Debit Card
	Pay by Electronic Check

Clicking on the “Pay by Credit/Debit Card” will open that payment method.

    	Pay by Credit/Debit Card
	<div>Full name <input type="text"/></div> <div>Card Type American Express</div> <div>Card Number <input type="text"/></div> <div>EXP Date 01 / 2014</div> <div>CVV <input type="text"/></div> <div>Would you like to Auto-Ship this order? <input type="checkbox"/></div> <div>Process Payment</div>

The payment by credit/debit card is the only payment method that supports the auto-ship feature at this time. If a customer wishes to Auto-Ship an order, a new field is displayed where customers can name their order and select how often they wish to have their order auto-shipped.


    	Pay by Credit/Debit Card
	<div>Full name <input type="text"/></div> <div>Card Type American Express</div> <div>Card Number <input type="text"/></div> <div>EXP Date 01 / 2014</div> <div>CVV <input type="text"/></div> <div>Would you like to Auto-Ship this order? <input checked="" type="checkbox"/></div> <div>Process Payment</div>

Set this Order to Auto-Ship


Ship this Order every Choose

Name Order

Clicking on the “Pay by Electronic Check” will open that payment method.



Pay by Electronic Check



Name on Account

Check Number

Routing Number

Account Number


Process Payment

MANAGING AUTO-SHIPPED ORDERS FROM THE FRONT OFFICE


With the SkyBank Advanced Payment Module, customers can manage auto-ship orders from the Front Office through their account.

MY ACCOUNT


Welcome to your account. Here you can manage all of your personal information and orders.




ORDER HISTORY AND DETAILS




MY WISHLISTS




MY MERCHANDISE RETURNS




MANAGE AUTOSHIP ORDERS



MY CREDIT SLIPS



MY ADDRESSES




MY PERSONAL INFORMATION

Once in their account they can click into “Manage Auto-Ship Orders” to manage the orders.

MANAGE AUTOSHIP ORDERS

Here are the autoship orders you've placed since your account was created.

Order name	Frequency	Total price	Cancel	Change
 My Weekly Order	7 days	\$1.00	Cancel	Update Frequency

From this panel they can change the frequency of the order, cancel the order, or look at the order detail to see the products that are involved in the order.

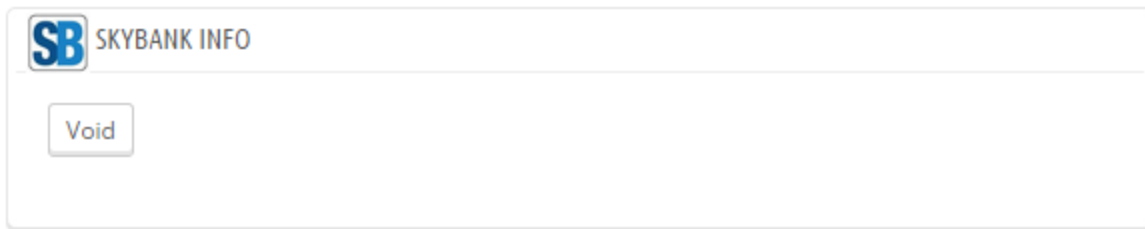
BACK OFFICE

The SkyBank Advanced Payment Module has been designed to provide full control of all transactions from the Back Office, without the need to login to a third-party payment gateway.

Orders

When a customer first makes a purchase, you can manage the transaction through the Orders Tab in the Back Office. Depending on the Default Transaction Mode you have selected on the configuration page and the current transaction status, you will be displayed one of several panels in the order screen:

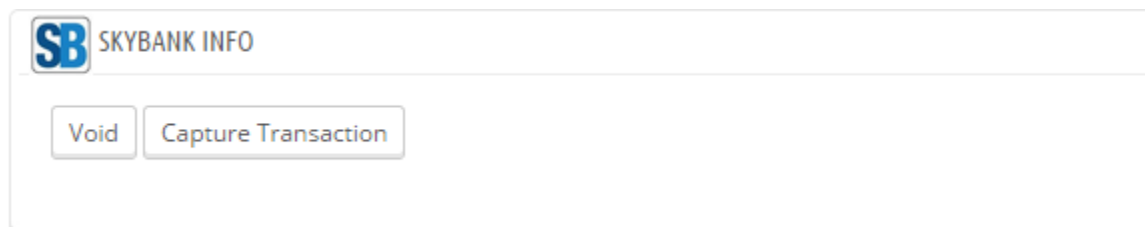
Panel 1: If the Default Order Status was set to “Sale” and the transaction has not yet been sent for settlement through the nightly batch file, the only option will be to void the order. Voiding the order releases any holds on the card and the transaction will not settle to the customer’s bank account. Please note, issuing banks have different rules on how long they hold authorizations, so even though you have voided the order, the customer may still see the pending hold on his bank account.

A screenshot of a web interface panel titled "SKYBANK INFO" with a logo on the left. Below the title bar, there is a single button labeled "Void".

Panel 2: If the Default Order Status was set to “Authorize Only” and the transaction has not yet been sent for settlement through the nightly batch file, the options will be to void or capture the order.

Option 1: If you have the Default Order Status set to “Authorize Only” you must first Capture the transaction in order to charge the customer’s card. If you do not capture the transaction, it will never settle to the customer’s bank account and will not fund to your settlement account.


Option 2: Voiding the order releases any holds on the card and the transaction will not settle to the customer’s bank account. Please note, issuing banks have different rules on how long they hold authorizations, so even though you have voided the order, the customer may still see the pending hold on their bank account. Also, you must first Capture a transaction that has been previously authorized in order to Void it.

A screenshot of a web interface panel titled "SKYBANK INFO" with a logo on the left. Below the title bar, there are two buttons: "Void" and "Capture Transaction".

Panel 3: Regardless of the Default Order Status, if the transaction has been sent for settlement through the nightly batch file, you will only have the option to issue a refund to the card.

Option 1: To submit a full refund, simply click the Full Refund button.

Option 2: If you wish to issue a partial refund, enter the refund amount in the field and click submit.


SKYBANK INFO

Amount to refund:

Please note, issuing a full refund sets the order status to “Canceled” while issuing a partial refund sets the order status to “Refund”.

Auto-Ship Orders

From your Back Office, we have also provided the ability to manage auto-ship orders. A new menu item has been added to the orders menu called “Auto-Ship Orders”. Clicking on this menu item will bring you to the following screen:

ORDERS

Orders
Invoices
Merchandise Returns
Delivery Slips
Credit Slips
Statuses
Order Messages
Auto-Ship Orders

CUSTOMERS

PRICE RULES
MODULES
SHIPPING
LOCALIZATION

30 DAYS

50%

TODAY

0

30 DAYS

\$1.00

30 DAYS

\$0.13

AUTO-SHIP ORDERS 2

ID

Reference

New client

Delivery

Customer

Total

Payment

Status

Date

PDF

5	AXTVJPOA	0	United States	L. Smith	\$1.00	SkyBank APM	Payment accepted	11/03/2014 12:57:15	--	View
1	CBXUQCWA	0	United States	T. Jones	\$1.00	SkyBank APM	Canceled	10/31/2014 11:02:53	--	View

Bulk actions

From this screen you can view every order that has been set to Auto-Ship from your customers. Clicking into any order will allow you to modify the Auto-Ship settings for each individual order; you can update or change frequency or cancel the Auto-Ship order completely.

AUTO-SHIP INFO

Auto-Ship every Days

Please note, your selection will override the settings created by your customer in their Front Office. Customers can still make changes to their settings from their Account.

Important, the only way to cancel an Auto-Ship order from the Back Office is by selecting “Cancel Auto-Ship”. If you issue refunds or voids for an individual order, it will not cancel the Auto-Ship order.

For your convenience, when an auto-ship order is placed, the payment type will be listed as “SkyBank Auto-Ship Order” so you can look through your order list at a glance and see which recent orders were automatically placed.

<input type="text"/>	<input type="text"/>	-	From	--	Search
			To		
\$1.00	SkyBank Auto-Ship Order	Payment accepted	11/03/2014 13:17:44		View
\$1.00	SkyBank APM	Payment accepted	11/03/2014 12:57:15		View
\$1.00	SkyBank APM	Payment accepted	10/31/2014 11:14:12		View
\$1.00	SkyBank APM	Canceled	10/31/2014 11:12:28		View
\$1.00	SkyBank APM	Refund	10/31/2014 11:06:44		View
\$1.00	SkyBank APM	Canceled	10/31/2014 11:02:53		View