

Installation Manual for PayPal Plus Magento

This manual describes the installation and usage of the PayPal Plus extension for Magento.

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1 Introduction

This manual explains the installation, configuration and usage of the payment module for Magento and PayPal Plus.

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

- Set up a Sandbox account for the testing (cf. further below) before beginning with the installation of the module
- Have your login data for PayPal Plus at hand
- Magento payment module by sellxed.com/shop
- Access data to your server and 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 Process

In this document you will find all information important 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.

The installation consists of the following steps:

1. Setting up of a Sandbox account for the PayPal Plus test mode
2. Configuration of the basic settings of the payment module
3. Configuration of the payment methods
4. Carrying out of a test purchase
5. If the test was successful, you can insert the details of the live account

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 PayPal Plus might not get through to the shop.

1.2 System Requirements

In general, the plugin has the same system requirements as Magento. Below you can find the most important requirements of the plugin:

- PHP Version: 5.4.x or higher
- Magento: 1.7.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.

1.3 Setting up a Sandbox Account at PayPal PLUS and Creating Users


In order for you to use PayPal Plus you will need new access data. The data required for previous PayPal modules can no longer be used. Please note that by installing PayPal Plus the PayPal modules used up to now will be deactivated in the administration panel.

Before beginning with the installation you should set up a Sandbox Account. You will receive the live access data in the Developer Portal for the new REST API.

Please note that while implementing a Sandbox Account you may only select those countries in which PayPal Plus services are available.

1. Create a user account via <http://developer.paypal.com/>
2. Log in with your user account and switch to **Dashboard** at the top side margin.
3. Via **Sandbox > Accounts** you can set up your Sandbox access data, should you not have done so already. To run a test you need to create a **Sandbox Account** via **Sandbox > Accounts**. Create a Merchant (Merchant Account) and a Buyer (Buyer Account)

Create Test Account

A personal or business test account can also be created on sandbox.paypal.com. 

Account Details

Country

Germany 

Account Type

- ☒ Personal (Buyer Account)
☐ Business (Merchant Account)

Email Address

Password (8-20 characters)

First Name (optional)

Last Name (optional)

Payment Methods

PayPal Balance

0 .00 EUR

Bank Verified Account

- ☒ Yes ☐ No

Credit Cards

Visa 

Note (optional)

Create Account

Figure 1.1: Creating a Sandbox Account

2 Configuration of the PayPal Plus Accounts

2.1 Create App

Next you need to create a new app via **Dashboard > My Apps** via the **Create App** button. The app name can be chosen freely it's only purpose is for identification in case several stores are to be tied to the PayPal Plus account.

Via **Sandbox Developer Account** you can choose your Sandbox Account (Merchant Account) which you previously created. If you click on Create App the access data for the Sandbox-Mode will appear. You will now receive the Client ID and Secret. Please copy this access data into the access data fields of the [Main Module](#) You can switch to Live at the top after having created the Create App. Then you will receive the access data for the Live Mode.

Create New App

Create an app to receive REST API credentials for testing and live transactions.

Note Features available for live transactions are listed in your [account eligibility](#).

Application Details

App Name

Sandbox developer account

As a reminder, all apps created under your account should be related to your business and the type of business it conducts.
By clicking the button below, you agree to [PayPal Developer Agreement](#).

Figure 2.1: Creating an App

Dashboard
My Apps & Credentials
My Account
Sandbox
Accounts
Notifications
Transactions
IPN Simulator
Webhooks Simulator
Webhooks Events
Live
Transactions
Webhooks Events

paypal plus app

Sandbox Live

App display name: paypal plus app

SANDBOX API CREDENTIALS

Sandbox account

merchantplus@customweb.com

Client ID

AZsPPC3VBU7XdZJUx56B0bIFKf6w2ma1yQg7JwtxoyZnQG2zVI-5fCwmrDOiu2WoTD0hXDzuGnYnyH91

Secret

Show

SANDBOX WEBHOOKS

With webhooks, your app can be notified when certain events occur. You can create upto 10 webhooks at a time. Learn more about listening to webhooks in our [webhooks documentation](#).

Webhook	Webhook ID	Events tracked
This app has no webhooks at the moment.		

Add Webhook

SANDBOX APP SETTINGS

Return URL - Where users will be redirected after test transactions. Please allow up to 3 hours for the change to go into effect.

Return URL

App feature options

☒ **Accept payments** Accept one-time and subscription payments from PayPal members using PayPal and direct credit card processing. [Advanced options](#)
☒ **Invoicing** Issue invoices for payments owed, manage partial balances due, and enable custom net payment terms.
☒ **Payouts** Send batch payments to multiple PayPal accounts at once. You can vary the amount by recipient and select if you'd like it delivered by phone number or email.
☐ **PayPal Here** Process swiped/card-present card transactions.
☐ **Log In with PayPal** Identity service that enables your customers to log in with their PayPal login.

Save

Figure 2.1: Display of the Credentials

2.2 Setting up the Module and the Payment Methods

The access data shown above needs to be copied in to the main module for the sandbox and the live account and then save the data. Next you can activate the payment methods. With this module you receive two payment methods:

- PayPal: This is the usual processing of the PayPal payment method as a redirection via the new REST API
- PayPal Plus: The new payment method PayPal Plus is implemented directly into the checkout procedure. Depending on the scoring of the customer the possible payment methods will be shown. From credit card, invoice to direct debit.

3 Module Installation and Update in the Magento 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.

In the following you will find the installation manual for Magento 1 as well as Magento 2

3.1.1 Magento 1

Compiler Cache / Caching

Before you start the installation or after doing an update of the module, please make sure, that the compiler cache is disabled. Also make sure that you cleared the cache otherwise it could be that the settings page is not visible.

1. Create a back-up of your shop.
2. Extract the content of the ZIP file.
3. Copy the **entire content** of the folder "files" into the main directory of the server of your shop respectively to the folder where the plugins are copied normally. In order to do so, use your usual ftp program. Make sure that the folders aren't replaced but merely merged.

3.1.2 Magento 2

Im Folgenden werden die Schritte für die Installation und das Update der Extensions erklärt.

3.1.2.1 Installations Requirements

Bitte beachten Sie, folgende Voraussetzungen sind für den Betrieb von Magento 2 zwingend zu erfüllen:

1. System requirements von Magento (<http://devdocs.magento.com/guides/v2.0/install-gde/system-requirements.html>)
2. Der Cron Job muss korrekt eingerichtet sein, sonst können keine Extensions installiert werden. Weitere Informationen finden Sie hier: <http://devdocs.magento.com/guides/v2.0/config-guide/cli/config-cli-subcommands-cron.html>

3.1.2.2 Installation

For the installation of the plugin in your Magento 2 store please follow these steps:

1. Readiness Check

Before uploading the plugin it is necessary to do the Readiness Check for Magento 2

1. 1. Save [this script](#) as cw-setup.php on your computer.
2. 2. Upload this cw-setup.php Script into the root directory of your Magento 2 installation.
3. 3. Access your server via SSH and run this command: `php cw-setup.php`
4. 4. The script will present you with additional commands which you need to execute.

About the cw-setup.php script

The provided script generates a set of commands which should be executed to clean up Magento 2. The script itself doesn't execute anything. It only generates the necessary commands.

2. Upload

Upload the content of the folder **files_2** into the root directory of your server. Execute the commands provided by the cw-setup.php script again.

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.

3.2.2.1 Magento 1

1. Download the newest version of the plugin. The download is available in your sellxed.com account under "My Downloads".
2. Extract the ZIP file.
3. Upload the folder **files_1** into the root directory of your shop.
4. Clear the Magento cache

3.2.2.2 Magento 2

1. Download the newest version of the plugin. The download is available in your sellxed.com account under "My Downloads".
2. Extract the ZIP file.
3. Upload the folder **files_2** into the root directory of your shop.
4. Clear the Magento cache

3.3 Database Migration

This section describes how you can run the database migration script

This only needs to be done if your Magento installation shows error messages regarding missing tables or columns in the database.

3.3.1 Magento 1

Clear the Magento cache

If this does not resolve the issue, remove the entry paypalpluscw_setup from the core_resource table and clear the cache again.

3.3.2 Magento 2

From the command line run the following command:

```
php bin/magento setup:upgrade
```

4 Module Configuration in the Magento 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 Configuration of the Main Module

4.1.1 Magento 1

The settings for the main module can be found under **System > Configuration > PayPal Plus**. Enter the various options, some of which you have already specified in the configuration with PayPal Plus. Information on the functionalities as well as the impact of the individual settings can be found directly by the option.

The field "Time-Out for pending Payments" defines after how many minutes the order status should switch from pending to cancelled (0 means that nothing should be changed) if no successful feedback concerning the payment is received from PayPal Plus. This might occur e.g. if the customer has closed his or her browser. Further information on this topic can be found under [Order Status](#).

4.1.2 Magento 2

You will find the settings of the main module via **Stores > Configuration > Sales > PayPal Plus > General**.

Fill in the fields according to the configuration of PayPal Plus or with the data which you received directly from PayPal Plus. You can find more exact explanations regarding each option in the help text by the input boxes.

Shop



Kunden Alias Management	<input type="text" value="Nein"/>	[STORE VIEW]
	Sie können Ihren Kunden gestatten ihre Aliasse auf ihrem Konto zu verwalten/löschen.	
Benachrichtigung abwarten	<input type="text" value="Nein"/>	[WEBSITE]
	Es kann in einigen Fällen ein paar Sekunden dauern bis die Transaktion erfolgreich genehmigt wird. Wenn diese Option aktiviert ist, wird die Benachrichtigung erwartet.	

General



Betriebsmodus	<input type="text" value="Test Modus"/>	[STORE VIEW]
	If the test mode is selected the test account id is used. Otherwise the configured live account id is used.	
Live account ID	<input type="text"/>	[STORE VIEW]
	The live account ID as given by the Sellxedpay .	
Live API password	<input type="text"/>	[STORE VIEW]
	The live API password as given by Sellxedpay .	
Test Account ID	<input type="text"/>	[STORE VIEW]
	The test account ID as given by the Sellxedpay . Generic test account: 401860-17795278	
Test API password	<input type="text"/>	[STORE VIEW]
	The test API password as given by Sellxedpay . Password for generic test account: 8e7Yn5yk	
Liability Shift Behavior	<input type="text" value="Mark transactions without liability shift as uncertain"/>	[STORE VIEW]
	If no liability shift is given by a transaction, should the transaction be marked as uncertain?	
Bestell-Präfix	<input type="text"/>	[STORE VIEW]
	Here you can insert an order prefix. The prefix allows you to change the order number that is transmitted to Sellxedpay . The prefix must contain the tag {id}. It will then be replaced by the order number (e.g. name_{id}).	

Figure 4.1: Magento 2: Configuration of the basic module. Please note, that this is an example and the settings can differ.

4.2 Configuration of the Payment Method

4.2.1 Magento 1

After having successfully installed the main module, you will find the individual payment modules under System > Configuration > Payment Methods. You can save individual settings for each payment method and thereby optimally adapt the payment methods to your existing processes. The most central options are described in more detail further below.

4.2.1.1 Direct Capturing of Invoices

The "Invoice Creation" specifies if invoices should be captured directly or not. Captured invoices can no longer be modified. If you wish to be able to modify the ordered article for debiting, please set this option to "Deferred".

4.2.2 Magento 2

After having successfully configured the main module, you will find the settings for each payment method in your shop via Stores > Sales > Payment Methods. For each payment method you can change the settings individually to optimize the payment processing in your shop.

4.2.2.1 Accounting

For each payment method you need to choose whether you want to register directly or delayed. A delayed booking only reserves the amount. Therefore it is important that you follow the instructions for such transactions as listed below. Reservations are usually only valid for a few days so we recommend to register directly. The delayed booking isn't available for every payment method.

4.2.2.2 Authorization Method

For some payment methods you can choose between different authorization methods. The authorization method determines how the payment form is presented in your shop. Please note that for some authorization methods with credit cards there are extended PCI requirements. (<https://www.sellxed.com/en/blog/pci-300-changes>).

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 PayPal Plus and the module

It may be that settings saved in the payment modules overwrite settings saved in PayPal Plus.

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 PayPal Plus during the authorisation process. The payment method is displayed in any case

4.5.1 Usage of the Integrated Multishop Functionality of Magento

The payment module supports the multishop feature of Magento. No further modifications are necessary. The module automatically recognises the shop the order belongs to. In order for the multishop functionality to work, it is, however, necessary that the individual sub-shops within Magento have been configured correctly.

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

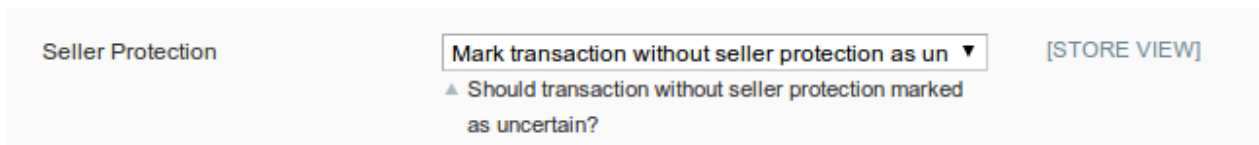
5.2.2 Order status "cancelled"

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 Seller Protection by PayPal Plus

The module transmits all necessary information to PayPal Plus, so that you can also participate in the PayPal Plus seller Protection Program. Further information regarding this program can be found directly at PayPal([Further Information](#)).

You further have the possibility to mark payments which don't receive Seller Protection. To do so you can choose under Seller Protection, whether you want to mark payment without seller protection. Those transactions will be moved to an uncertain order status by the module and then marked accordingly.



The screenshot shows a user interface for Seller Protection. On the left, the text "Seller Protection" is displayed. To its right is a dropdown menu with the text "Mark transaction without seller protection as un" and a downward arrow. Below the dropdown menu, there is a link that reads "▲ Should transaction without seller protection marked as uncertain?". To the right of the dropdown menu, there is a link that reads "[STORE VIEW]" in blue capital letters.

Figure 5.1: Marking Orders without Seller Protection.

6 The Module in Action

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

6.1 Capturing / Cancelling of Orders

6.1.1 Magento 1

Please note:

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

6.1.1.1 Case 1: Invoice Capturing Directly After the Order

In the following, the process is explained for the case that you have chosen to directly create the invoice after having placed the order and only authorise payments - not capture them directly - (further information on the configuration can be found under [Creating the Invoice](#)).

In order to capture the order, open the invoice and click "capture". If you click "Cancel", the authorisation will be cancelled.

6.1.1.2 Case 2: Deferred Invoice Capturing

In case you have chosen the deferred invoice creation, you first have to create the invoice by clicking on the button "Invoice". Select "Capture online" below the total amount and then click on "capture invoice". The invoice has now been captured.

6.1.1.3 Cancel of orders/transactions

In order to cancel a transaction you first have to open the invoice and click on the cancel button. After that open the order and click on cancel here again. This will send the cancel of the order to PayPal Plus. Please note that you need to cancel the invoice and the order.

6.1.2 Magento 2

6.1.2.1 Capture Bug in Magento (v. 2.0.0)

In version 2.0.0 of Magento there is a bug. It could be that invoices cannot be captured. Please make the following adjustments in the file `/vendor/magento/module-sales/Controller/Adminhtml/Order/Invoice/Capture.php`:

1. Delete the lines in the picture bellow which begin with a - .

2. Add the lines which has been marked with a + .

Here you can find the codes to be inserted in the form of a text:

```
+ )->addComment( __('The credit memo has been created automatically.'));
```

Method: execute()

Diff:

```
-      try {
-          $invoiceManagement = $this->_objectManager->get('Magento\Sales\Api\InvoiceManagementInterface');
-          $invoiceManagement->setCapture($invoice->getEntityId());
+          $invoice->capture();
+          $invoice->getOrder()->setIsInProcess(true);
```

Figure 6.1: Opening the Invoice

6.1.2.2 Performing Captures

Please note

The transaction management between PayPal Plus and your shop isn't synchronized. When you capture the payments at PayPal Plus , the status is not adjusted and a second capture isn't possible in your shop.

In the configuration of the payment method you can decide whether the invoice should be captured after having been created or if only the payment is authorized. You also decide if you already want to create an invoice. If you create an invoice you can't make any adjustments for the capture.

In order to capture invoices please take the following steps:

1. Open the order and create an invoice.
2. If you have set the Invoice Settlement to deferred you can still make adjustments to the invoice.
3. Click on Capture Online.

Invoice Settlement	<div>Deferred settlement ▼</div> <p>Choose settlement after order in case you want an invoice to be created with your order. The state of the invoice will set according to your capture status.</p>	[WEBSITE]
Customer Address	<div>No address is sent ▼</div> <p>Should the customer address be sent?</p>	[STORE VIEW]
Capturing	<div>Deferred ▼</div> <p>Should the amount be captured automatically after the order (direct) or should the amount only be reserved (deferred)?</p>	[STORE VIEW]
Authorisation Method	<div>Payment Page ▼</div> <p>Select the authorisation method to use in order to process this payment method.</p>	[STORE VIEW]
Alias Manager	<div>Inactive ▼</div> <p>The alias manager allows the customer to select from a credit card previously stored.</p>	[STORE VIEW]

Figure 6.1: Capture options

6.1.2.3 Cancelling / Voiding Orders

In order to issue a cancellation of the payment you must use the "Void" button. If you wish to use the "Cancel" button you must cancel the payment in the PayPal Plus backend portal.

6.2 Refunds

6.2.1 Magento 1

You can refund already captured transactions and automatically transmit them to PayPal Plus. In order to do so, open the invoice of the captured order. By clicking on "Credit Memo" the window for refunds is opened. Enter the amount you wish to refund. By clicking on "Refund" the refund is transmitted to PayPal Plus.

Below you find a step-by-step guide including screenshots:

Order View
 Information
Invoices
 Credit Memos
 Shipments
 Comments History
 Transactions

Order # 200000003 | 17.04.2014 16:40:42

[Back](#)
[Edit](#)
[Send Email](#)
[Credit Memo](#)
[Hold](#)
[Ship](#)
[Reorder](#)

Page 1 of 1 pages | View 20 per page | Total 1 records found
 [Reset Filter](#)
[Search](#)

Invoice #	Bill to Name	Invoice Date	Status	Betrag
200000003	Thomas Lueth	17.04.2014 16:41:41	Paid	20.99 €

Figure 6.1: 1. open the invoice

Invoice #100000026 | Paid | 23.04.2014 18:52:08 (the invoice email is not sent)

[Back](#) [Send Email](#) [Credit Memo](#) [Print](#)

Order # 100000043 (the order confirmation email was sent)		Account Information	
Order Date	23.04.2014 18:51:23	Customer Name	Test Test
Order Status	Processing	Email	info@customweb.com
Purchased From	Main Website Main Store English	Customer Group	General

Figure 6.1: 2. click on credit memo - Important - open the invoice first!.

Refund Totals	
Subtotal	156,00 €
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	161,00 €
<input type="checkbox"/> Append Comments <input type="checkbox"/> Email Copy of Credit Memo	
Refund Offline Refund	

Figure 6.1: 3. Adjust the refunding amount (see more info below [Refunds Based on Quantity](#))

Refund Totals	
Subtotal	156,00 €
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	161,00 €
<input type="checkbox"/> Append Comments <input type="checkbox"/> Email Copy of Credit Memo	
Refund Offline Refund	

Figure 6.1: 4. To process the refund click on **Refund**.

✓ The credit memo has been created.

Order # 100000041 | 23.04.2014 18:26:16

[Back](#) [Send Email](#) [Reorder](#)

Order # 100000041 (the order confirmation email was sent)		Account Information	
Order Date	23.04.2014 18:26:16	Customer Name	Test Test
Order Status	Closed	Email	info@customweb.com
Purchased From	Main Website Main Store English	Customer Group	General
Placed from IP	160.85.155.47		

Figure 6.1: Wait for the confirmation of the refund.

6.2.1.1 Refunds Based on Quantity

You can make refunds based on product quantity. In order to do so, open the credit memo window and enter the amount of products you wish to refund to your customer's card

You can carry out as many individual refunds as you wish until you have reached the quantity of the original order. The status of the order then automatically switches to **complete**.

Order # 200000055 | 02.12.2013 16:37:59

Back Edit Send Email Credit Memo Hold Ship Reorder

Page 1 of 1 pages | View 20 per page | Total 2 records found

Credit Memo #	Bill to Name	Created At	Status	Refunded
200000001	Leandra Simitovic	02.12.2013 16:42:10	Refunded	35.00 €
200000002	Leandra Simitovic	02.12.2013 16:47:03	Refunded	146.00 €

Figure 6.1: Overview of all Refunds

6.2.1.2 Refunding of Any Amount

As each position of the order needs to be transmitted to PayPal Plus we can't support the function **Adjustment Refund** - meaning the refund of any amount. Only whole items can be refunded by adjusting the refund amount.

Adjusting the amount of several refunds

It is possible to carry out several refunds on an order. Please note that you can refund a maximum of 100% of the original amount. If you have already carried out a refund you need to make sure not to refund more than the initial amount by adjusting the amount and the Adjustment Fee.

6.2.2 Magento 2

6.2.2.1 Resolving a Current Magento Bug (v. 2.0.0)

In the 2.x version of Magento there is a bug. Please make the following adjustments to the file `/vendor/magento/module-sales/Model/Order/Payment.php` :

1. Delete the lines in the picture bellow which begin with a - .
2. Add the lines which has been marked with a + .

Method: `registerRefundNotification($amount)`

Diff:

```

$creditmemo->setPaymentRefundDisallowed(
    true
)->setAutomaticallyCreated(
    true
- )->register()->addComment(
+ )->addComment(
    __('The credit memo has been created automatically.')
);

```

Figure 6.1: Adjustments so you are able to enter a credit memo.

Here you can find the codes to be inserted in the form of a text:

+)->addComment(__('The credit memo has been created automatically.'));

6.2.2.2 Performing Credits

For registered transactions you can create credits and transmit them automatically to PayPal Plus . In order to do so open an invoice of an already registered order. By clicking on "Credit Memo" a dialog will open for the refunds. Now you can adjust the number of products which you would like to credit in the credit memo dialogue.

Here you can find each step again including screenshots:

#000000003

🔍
🔔
👤 admin ▾

← Back
Send Email
Credit Memo
Hold
Ship

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

🔍

⌵ Filters

👁 Default View ▾

⚙ Columns ▾

📄 Export ▾

Select It... ▾

1 records found

20

▾
per page

<

1

of 1

>

⌵	Invoice ▾	Invoice Date	Order Number	Order Date	Bill-to Name	State	Amount	Action
<input type="checkbox"/>	000000003	Dec 14, 2015 7:55:37 AM	000000003	Dec 14, 2015 7:54:41 AM	Test Customweb	Paid	CHF39.00	View

Figure 6.1: 1. Opening the Invoice

New Memo for #000000003

admin ▾

[← Back](#)
[Reset](#)

Order & Account Information

Order # 000000003 (The order confirmation email was sent)

Order Date	Dec 14, 2015, 7:54:41 AM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	212.90.201.186

Account Information

Customer Name	Guest
Email	info@customweb.com
Customer Group	NOT LOGGED IN

Address Information

Billing Address [Edit](#)

Test Customweb
 Teststrasse 2
 Zürich, Zug, 8032
 Switzerland
 T: 555466684

Delivery address [Edit](#)

Test Customweb
 Teststrasse 2
 Zürich, Zug, 8032
 Switzerland
 T: 555466684

Figure 6.1: 2. Click on Credit Memo - Important the invoice needs to be opened first.

Refund Totals	
Subtotal	156,00 €
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	161,00 €
<input type="checkbox"/> Append Comments	
<input type="checkbox"/> Email Copy of Credit Memo	
<input checked="" type="button" value="Refund Offline"/> <input checked="" type="button" value="Refund"/>	

Figure 6.1: 3. Choose which products you would like to credit and click on Refund Online.

#000000003

admin

← Back
Send Email
Credit Memo
Hold
Ship

ORDER VIEW

Information

 Invoices

Credit Memos

 Shipments

 Comments History

 Order History

 Transactions

Default View
 Columns
 Export

Select It...
0 records found
20 per page
< 1 of 1 >

	Credit Memo	Created	Order	Order Date	Bill-to Name	State	Refunded	Action
We couldn't find any records.								

Figure 6.1: Overview of all the credits made

Adjusting the amounts for several refunds


It is possible to issue several credits on one order. Please note that you can't credit more than 100% of the original amount. If you have already issued a credit you will need to make sure you don't credit more than the original amount, by adjusting the amount and the Adjustment Fee.

6.3 Useful Transaction Information on the Order

6.3.1 Magento 1

In each order, processed via our module, you can find an overview of the most important information about the transaction as well as a transaction history.

Payment Information

Authorisation amount	161.0000
Currency	CHF
Payment method	MasterCard
Payment ID	23679571
Captured amount	161
Transaction authorised	Yes
Transaction uncertain	 No
Transaction captured	Yes
Transaction paid	Yes
Alias	XXXXXXXXXXXX0007 (12/13)
Alias Token	8B1974E9-59EB-442C-A1D4-34BEC568EE23
Acceptance	test123
Card number	XXXXXXXXXXXX0007
Card expiry date	12/13
Merchant reference	sellxed_og_100000087

Transaction history

Date	Action	Message
2013-09-12 12:53:50	authorization	The amount of 161.00 is authorized.
2013-09-12 12:53:50	capturing	The amount of 161.00 is captured.

Order was placed using CHF

Figure 6.1: Transaction Information.

6.3.2 Magento 2

In each order, which was processed by our module, you will find an overview of the most important information on the transaction and transaction history.

Payment & Shipping Method

Payment information



Visa

Transaction ID	14
Authorisation Amount	107
Currency	CHF
Payment period	Visa
Payment ID	h1ElhGAKOSCitASfE0libOShndA
Test Transaction ?	Yes
Transaction authorised	Yes
Transaction uncertain ?	No
Transaction paid	Yes
Card Type	Saferpay Test Card
Effective Payment Method Name ?	SaferpayTestCard
Authorisation Method	PaymentPage
3D Secure	Successful

Dec 14, 2015 11:08:14 AM | Authorization
The amount of 107.00 is authorized. (Customer successfully returned from the Saferpay payment page.)

The order was placed using CHF.

Shipping & Handling Information

Flat Rate - Fixed CHF10.00

Figure 6.1: Transaction Information.

6.4 Using Invoice Details of a Processor

6.4.1 Magento 1

In the following context you can view or embed the "payment details" of for example an "Open Invoice" transaction:

6.4.1.1 Magento Order Confirmation (E-Mail)

The "payment information" will be visible in the default "order confirmation e-mail" of Magento.

6.4.1.2 Magento Invoice (PDF)

The "payment information" will be visible in the default Magento-Invoice.

6.4.1.3 Magento-Backend (Transaction details)

You can view the payment and transaction details in Magento under **Sales > Orders**.

Order View

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

Order # 145000019 | 07.03.2017 19:49:33

Back

Edit

Send Email

Void

Hold

Ship

Reorder

Order # 145000019 (the order confirmation email was sent)

Order Date

07.03.2017 19:49:33

Order Status

Pending

Purchased From

Main Website
Madison Island
English

Placed from IP

212.90.201.186

Billing Address

Edit

Admin Customweb

Beispielstrasse 1

Zürich, Zürich, 8000

Schweiz

T: 044 123 45 67

Payment Information

Autorisierungsbetrag

850

Währung

EUR

Zahlungsmethode

Open Invoice

Zahlungs-ID

3575732

Testtransaktion

Ja

Transaktion autorisiert

Ja

Transaktion ist unsicher

Nein

Transaktion bezahlt

Ja

Transaktionsübersicht

Datum

Aktion

Nachricht

2017-03-07 18:49:50

authorization

Der Betrag von '850.00' wurde autorisiert.

Zahlungsinformationen

Bank: Customweb Test Bank

Kontoinhaber: Customweb GmbH

IBAN: DE2501200000TEST000000000003

BIC: TESTBIC0003

Referenznummer: BP3575732/2749

Order was placed using EUR

Account Information

Customer Name

Admin Customweb

Email

info@customweb.com

Customer Group

General

Shipping Address

Edit

Admin Customweb

Beispielstrasse 1

Zürich, Zürich, 8000

Schweiz

T: 044 123 45 67

Shipping & Handling Information

Free Shipping - Free € 0.00

Figure 6.1: Transaction details within Magento.

6.4.1.4 Magento Success-Page

Due to technical limitations, it is currently not possible to display the "payment information" here.

6.4.2 Magento 2

In the following context you can view or embed the "payment details" of for example an "Open Invoice" transaction:

6.4.2.1 Magento Order Confirmation (E-Mail)

The "payment information" will be visible in the default "order confirmation e-mail" of Magento.

6.4.2.2 Magento Invoice (PDF)

The "payment information" will be visible in the default Magento-Invoice.

6.4.2.3 Magento-Backend (Transaction details)

You can view the payment and transaction details in Magento under **Sales > Orders**.

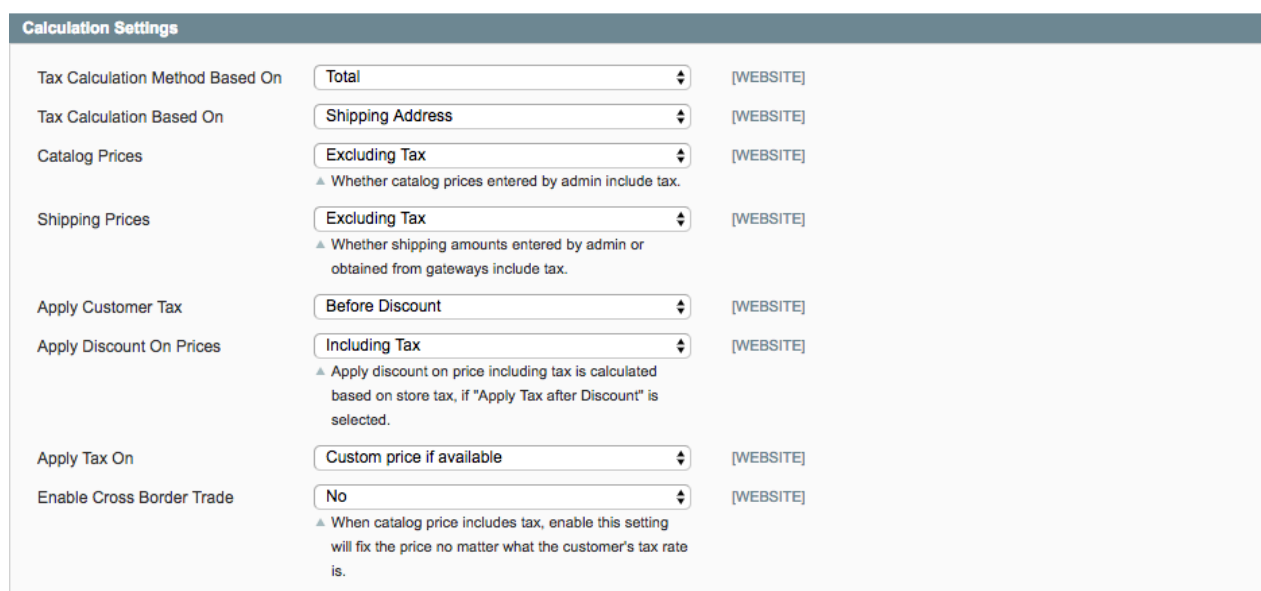
6.4.2.4 Magento Success-Page

Due to technical limitations, it is currently not possible to display the "payment information" here.

6.5 Tax Calculation Settings

6.5.1 Magento 1

To ensure that the taxes are calculated correctly and transmitted correctly to a third party invoice provider inside Magento please make sure that you set the calculation settings in the menu under **System > Configuration > Tax** as showed in the screenshot below.



Calculation Settings		
Tax Calculation Method Based On	Total	[WEBSITE]
Tax Calculation Based On	Shipping Address	[WEBSITE]
Catalog Prices	Excluding Tax	[WEBSITE]
▲ Whether catalog prices entered by admin include tax.		
Shipping Prices	Excluding Tax	[WEBSITE]
▲ Whether shipping amounts entered by admin or obtained from gateways include tax.		
Apply Customer Tax	Before Discount	[WEBSITE]
Apply Discount On Prices	Including Tax	[WEBSITE]
▲ Apply discount on price including tax is calculated based on store tax, if "Apply Tax after Discount" is selected.		
Apply Tax On	Custom price if available	[WEBSITE]
Enable Cross Border Trade	No	[WEBSITE]
▲ When catalog price includes tax, enable this setting will fix the price no matter what the customer's tax rate is.		

Figure 6.1: Recommended tax calculation settings for Magento.

Please also make sure that inside the settings of your promotion in the tab "Actions" the discount is not applied to the shipping amount as Magento is not correctly transmitting the tax rate there.

6.6 OneStepCheckout

6.6.1 Magento 1

The checkout of Magento can be modified and reduced to one step. The so called OnePageCheckout. Our modules support the most important OnePageCheckout extensions. If you are thinking of using a OneStepCheckout extension in combination with our PayPal Plus Magento, please make sure that you are using one of the following:

- OneStepCheckout by www.onestepcheckout.com

- OneStepCheckout by [Ahead Works](#)
- LightCheckout by [GoMage](#)
- Firecheckout by [Templates Master](#)

6.6.2 Magento 2

There is no official support for any OnePageCheckout module for Magento 2.

6.7 Setup a Cron Job to Activate the Timed Operations

6.7.1 Magento 1

To activate the timed operations of the plugin (e.g. update service, deleting pending orders, etc.) make sure that you set up the Magento Cron engine. Especially the update function allows you to automatically retrieve additional information or changes of your order directly via the API of PayPal Plus. Please note it could be that in order to use the update feature it may be necessary that PayPal Plus activates additional options in your account.

The module uses the standard cron engine of Magento. More information regarding the set up can be found [here](#).

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

6.7.2 Magento 2

The module uses the standard cron engine of Magento 2. More information regarding the set up can be found [here](#).

6.8 Magento 1 API Manual

Via API, our module provides plenty of information on a transaction. The following section describes which calls are possible and what information is provided.

6.8.1 General Information on Using the API

General information on using the Magento SOAP API can be found here: <http://www.magentocommerce.com/api/soap/introduction.html>

6.8.2 API Calls

This overview shows the API Versions and which API Calls they support.

6.8.2.1 API V1

- `$client->call($session, 'paypalpluscw_transaction.list');` //List of all transactions

- `$client->call($session, 'paypalpluscw_transaction.info', {transactionsId});` // Single Transaction

6.8.2.2 API V2

- `$client->paypalpluscwTransactionList($session);` //List of all transactions
- `$client->paypalpluscwTransactionInfo($session, {transactionsId});` //Single Transaction

6.8.2.3 XML-RPC

- `$client->call('call', array($session, 'paypalpluscw_transaction.list'));` //List of all transactions
- `$client->call('call', array($session, 'paypalpluscw_transaction.info', {transactionsId}));` //Single Transaction

6.8.2.4 REST

- `$this->callApi('paypalpluscw/transactions');` //List of all transactions
- `$this->callApi('paypalpluscw/transactions/{transactionsId}');` //Single Transaction

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:

PayPal

Account	Use a sandbox customer account
---------	--------------------------------

PayPal Plus

Account	Use a sandbox customer account
---------	--------------------------------

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 Module is not shown

If the module is not shown even though the files have been downloaded onto the server correctly, please check the following:

- The local.xml can be found in the /app/etc directory
- Make sure **disable_local_modules** is set to ,false'

8.2 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the PayPal Plus 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 Compatibility with Third-Party Plugins

The plugins listed below are compatible with our payment modules and allow you to handle certain tasks in a easier way.

9.1 Magento 1

9.1.1 Fees and discounts within Magento

To configure a PayPal Plus payment gateway based fee and discount, you will need the following 3rd-Party plugin.

- [Fooman Surcharge](#)

9.2 Birthday and gender in Magento 1

For certain payment service providers it is necessary to check the birthday an the gender of a customer. Magento 1 does not check this by default. this check can be enabled under "Go to System > Configuration | Customers > Customer Configuration > Name and Address Options".

9.3 Birthday and gender in Magento 2

For certain payment service providers it is necessary to check the birthday an the gender of a customer. Magento 2 does not check this by default. this check can be enabled under "Stores > Configuration | Customers > Customer Configuration > Name and Address Options".

10 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.

10.1 Log Levels

You can configure the log level in the PayPal Plus settings. The store log setting does not affect these log messages.

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

10.2 Log Location

The log file is stored in the Magento log directory. (Default Path: {shopRootDirectory}/var/log)

11 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.

11.1 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.

11.1.1 Magento 1

Initialize the shops core functions.

```
define('MAGENTO_ROOT', getcwd());
$mageFilename = MAGENTO_ROOT . '/app/Mage.php';
require_once $mageFilename;
Mage::setIsDeveloperMode(true);
ini_set('display_errors', 1);
umask(0);
Mage::app();
```

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

Load the transaction object by Id:

```
$dbtransaction = Mage::getModel('paypalpluscw/transaction')->load(
    ($transactionId);
$transactionObject = $dbtransaction->getTransactionObject();
```

Load the transaction object by Order Number:

```
$dbtransaction = Mage::getModel('paypalpluscw/transaction')->load(
    ($orderId, 'transaction_external_id');
$transactionObject = $dbtransaction->getTransactionObject();
```

11.1.2 Magento 2

Initialize the shops core functions.

```
use Magento\Framework\App\Bootstrap;
require __DIR__ . '/app/bootstrap.php';
$bootstrap = Bootstrap::create(BP, $_SERVER);
$obj = $bootstrap->getObjectManager();
```



```
$state = $obj->get('Magento\Framework\App\State');  
$state->setAreaCode('frontend');
```

Get the transaction factory.

```
$factory = $obj->get  
( 'Customweb\PayPalPlusCw\Model\Authorization\TransactionFactory' )-  
>create();
```

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

Load the transaction object by Id:

```
$dbTransaction = $factory->load($transactionId, 'entity_id');  
$transactionObject = $dbTransaction->getTransactionObject();
```

Load the transaction object by Order Number:

```
$dbTransaction = $factory->load($orderId, 'order_id');  
$transactionObject = $dbTransaction->getTransactionObject();
```

Load the transaction object by Payment Id:

```
$dbTransaction = $factory->load($paymentId, 'payment_id');  
$transactionObject = $dbTransaction->getTransactionObject();
```