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Installation Guide for Novalnet Gravity Form Plugin

Version	Date	Remarks
3.1.0	29.09.2023	[Enhanced] Hosted payment page integration has been updated to redirected page




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1 QUICK SETUP

This guide describes the quick installation procedure of Novalnet payment plugin (this guide comes along with the plugin), to integrate it with your shop system and to start accepting payments worldwide. For this integration, a Novalnet merchant account is needed to accept Novalnet payments, so please make sure that you have received your merchant account details from our sales team. If not, drop a mail to sales@novalnet.de

This Novalnet payment plugin package version (3.1.0) supports the following versions:

 WORDPRESS		
6.0 - 6.4.2	2.3 - 2.8.0	3.1.0

To get started:

1. Log in to the [Novalnet Admin Portal](#) with your merchant account details (user credentials)
2. Log in to your Gravity Forms shop system.
3. Make sure that you have extracted the payment plugin package from the zip file you have received. If you have received only the installation guide without the payment plugin package (zip file), please send us a mail to technic@novalnet.de with your merchant ID.

1.1 Plugin Installation

To install the Novalnet Payment Plugin, please go to your shop system and follow the steps below.

Step 1: Navigate to **Plugins** → **Add New** in your shop admin panel as shown below

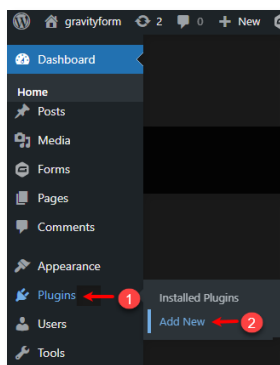


Figure 1

Step 2: Next to **Add Plugins**, click **Upload Plugin**.

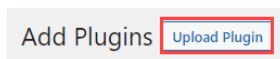


Figure 2

Step 3: In the next window that appears, click **Choose File** and choose the file **novalnet-gravity-forms.zip** included in the Novalnet Gravity Forms plugin package. Click **Install Now** to upload it into your shop system.

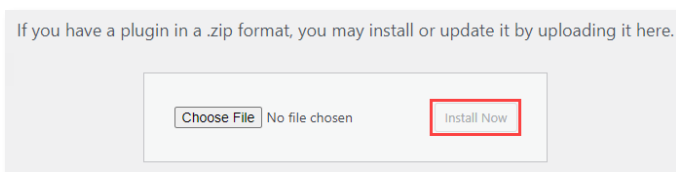


Figure 3

Step 4: After the installation, click **Activate Plugin** as shown below,

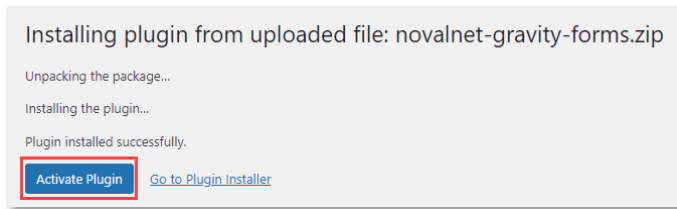


Figure 4

1.2 Global Configuration in the Gravity Form shop system

The main configuration occurs in your Gravity form shop system as well as in the [Novalnet Admin Portal](#). In your Gravity Form shop system navigate to **Forms → Settings → Novalnet**. Enter the following keys as given below:

- ❶ **Product activation key** - a unique token for merchant authentication and payment processing.
- ❷ **Payment access key** - a secret key assigned to each merchant which encrypts the data to avoid user manipulation and fraud.
- ❸ **Tariff ID** - a unique identifier created based on the tariff type at Novalnet.

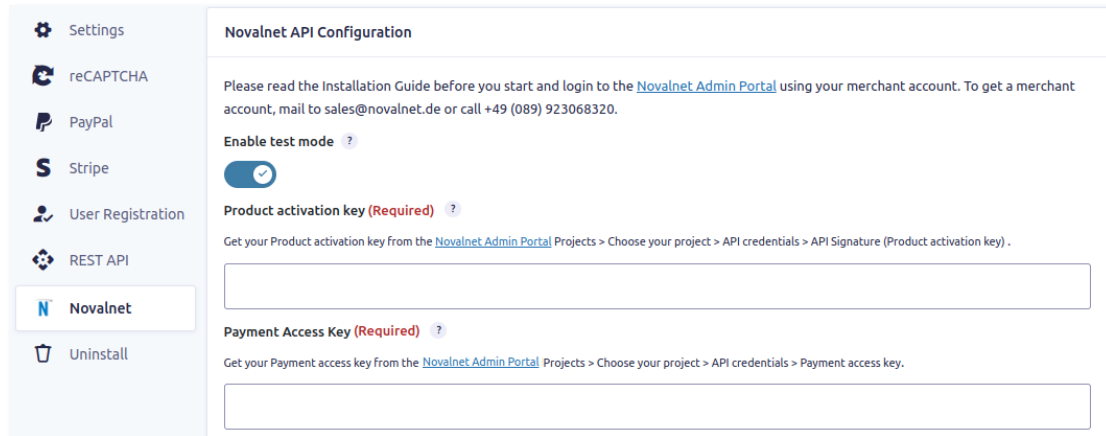


Figure 5

To get your **Product activation key** and **Payment access key**, go to the [Novalnet Admin Portal](#), navigate to **Projects** menu and click view icon on the right of your project to view the project details.

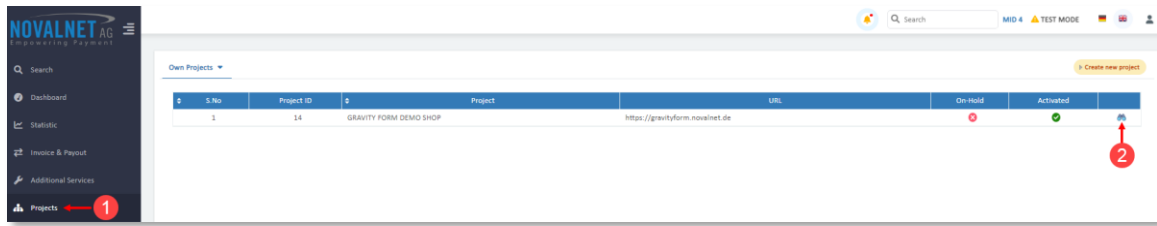


Figure 6

Click **API credentials**, copy the **API Signature (Product activation key)** and **Payment access key**. Create a Tariff ID for each tariff type for the webshop.

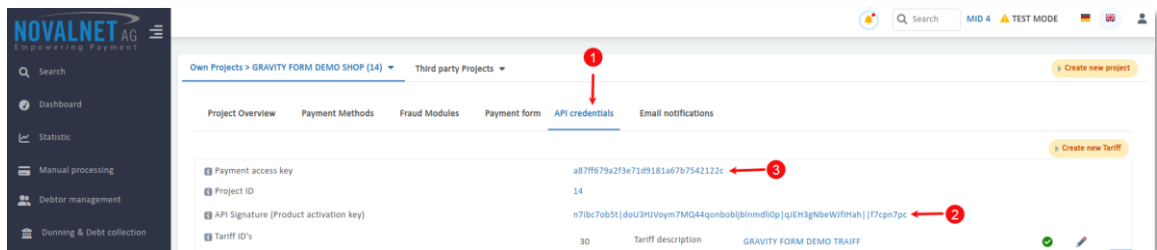


Figure 7

Paste the **Product activation key** and **Payment access key** in the respective fields in your shop system. Next, choose the Tariff ID from the drop down menu that you have created in the [Novalnet Admin Portal](#) for this Gravity Form shop system.

Novalnet API Configuration

Please read the Installation Guide before you start and login to the [Novalnet Admin Portal](#) using your merchant account. To get a merchant account, mail to sales@novalnet.de or call +49 (089) 923068320.

Enable test mode

Product activation key (Required)

Get your Product activation key from the [Novalnet Admin Portal](#) Projects > Choose your project > API credentials > API Signature (Product activation key).

Payment Access Key (Required)

Get your Payment access key from the [Novalnet Admin Portal](#) Projects > Choose your project > API credentials > Payment access key.

Select Tariff ID (Required)

Figure 8

Save Settings →

Then click to update the changes.

1.2.1 Notification/Webhook configuration in the Novalnet Admin Portal

In the **Novalnet Global Configuration** page on your shop system you will find your **Notification / Webhook URL** under **Notification / Webhook URL Setup**. Click **Configure** to link your **Notification / Webhook URL** to the **Novalnet Admin Portal** as shown below

Notification / Webhook URL Setup

Notification / Webhook URL

Figure 9

After successful configuration, your shop **Webhook URL** will be linked with your Novalnet Merchant account which can be seen under **Vendor script URL/ Notification & Webhook URL** field under **API credentials** of your project as shown below

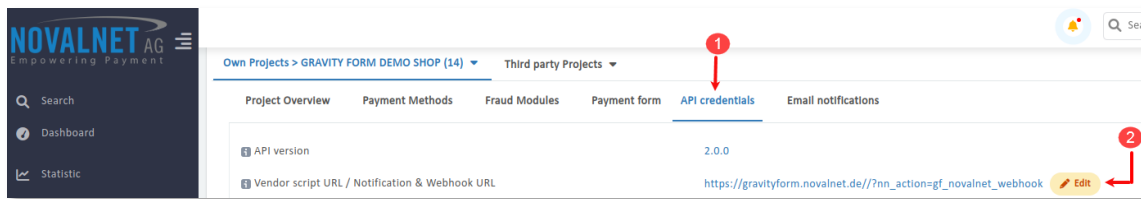


Figure 10

In your shop system, you can additionally test the Webhook URL manually and send notification emails to specific email addresses as shown below

Figure 11

- ❗ **Notification/Webhook URL** - Required to keep the merchant's database/system up to date and synchronized with Novalnet (for example: up-to-date transaction status delivery).
- ❗ **Deactivate IP address control (for test purpose only)** - Enable this to test the Novalnet Notification / Notification/Webhook URL manually. Disable this before setting your shop system live, to block unauthorized calls from external parties.
- ❗ **Send e-mail to** - Every execution will be sent as a message to the e-mail address defined in this field.

1.3 Payment Activation in the Novalnet Admin Portal

All the Novalnet supported payment methods can be viewed here: www.novalnet.com/payment. If you have questions on the payment methods or have additional payment method requests, please contact sales@novалnet.de

To activate the [preferred payment methods](#) for your website, navigate to [Novalnet Admin Portal](#) → **Projects** → Choose your projects → **Payment Methods** → click **Edit Payment Methods** in the top right corner as shown below

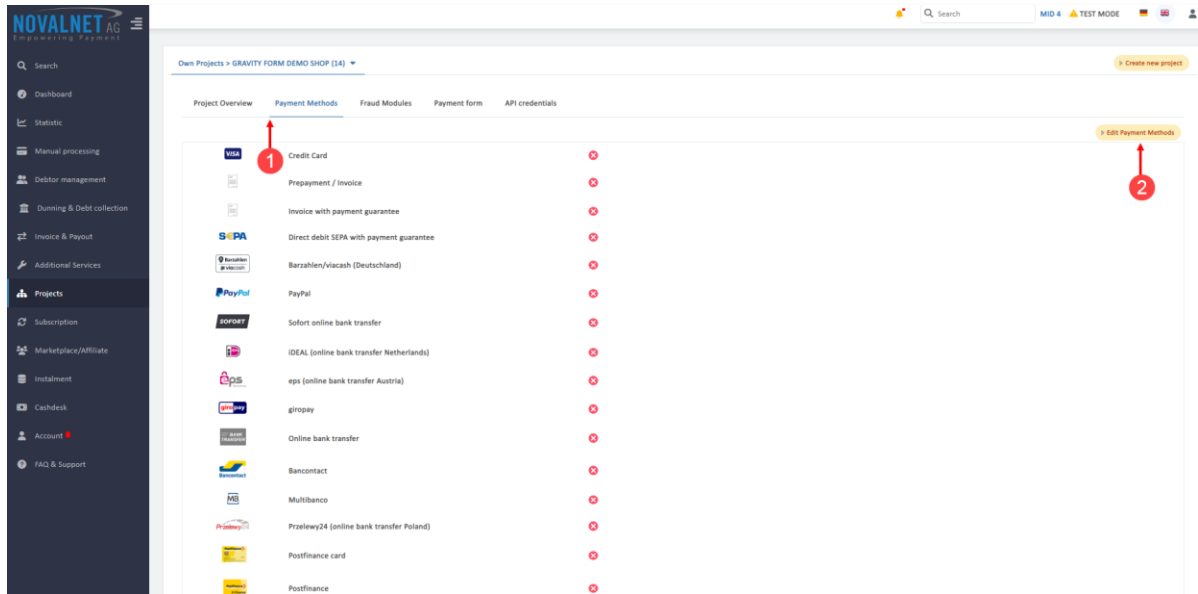


Figure 12

Now select the preferred payment methods and click **Update** to activate them.

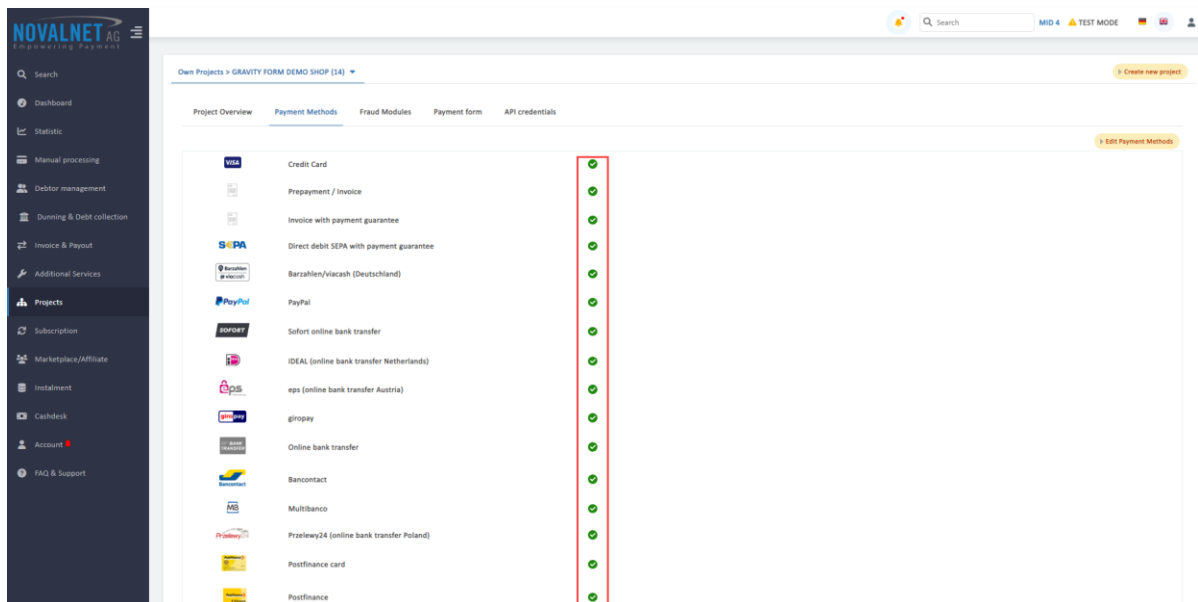


Figure 13

To use the **Apple Pay** payment method, go to **Apple Pay** → **Configure** → **Add new domain** in the [Novalnet Admin Portal](#) as shown below

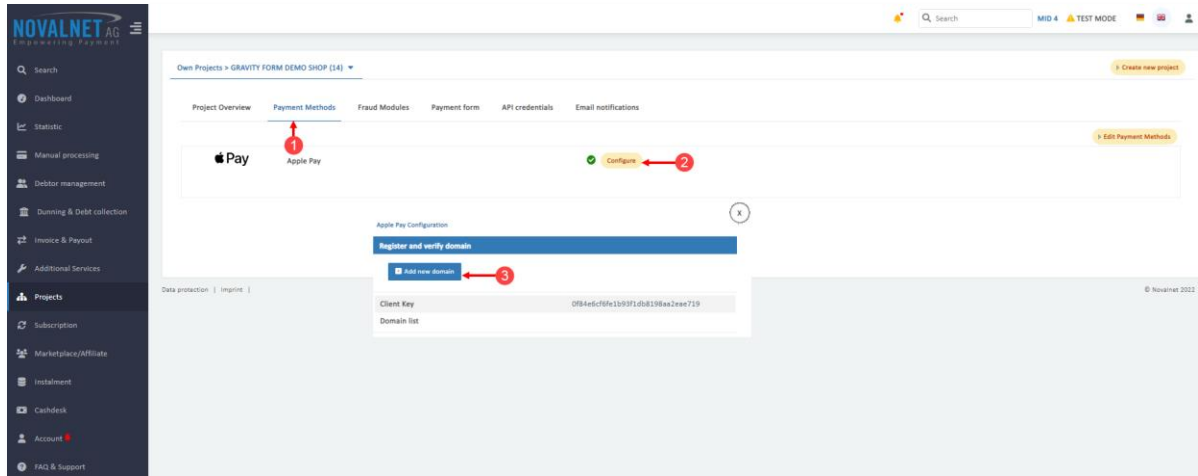


Figure 14

Then, paste your shop domain for which you enable **Apple Pay**, and click **Download verification file**. You will need to host that verification file in your domain's root directory.

For example: the path should be, <https://gravityform.novalnet.de/.well-known/apple-developer-merchantid-domain-association>

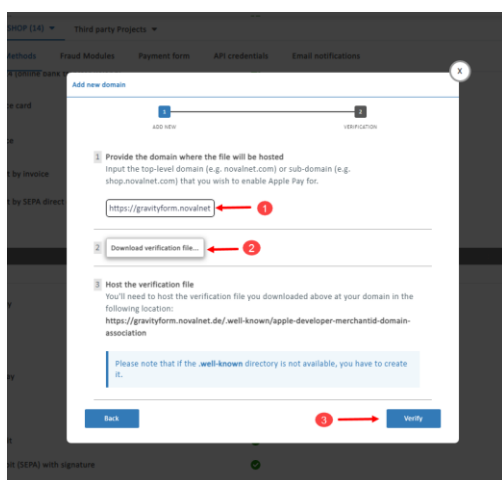


Figure 15

⚡ Please note that if the **.well-known** directory is not available, you have to create it.

To use the **PayPal** payment method, configure the PayPal API details in [Novalnet Admin Portal](#) as shown below

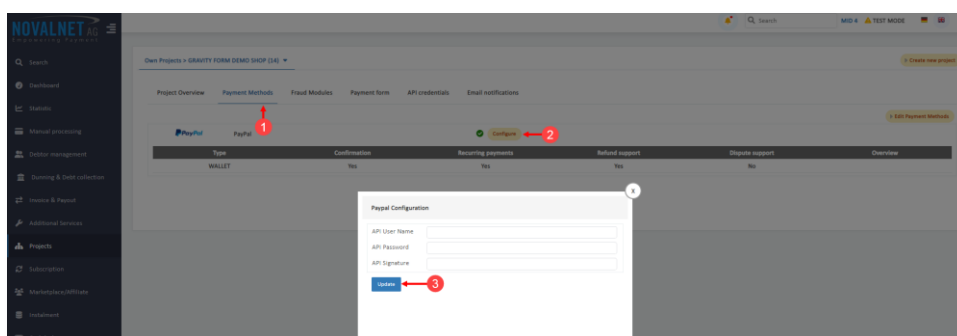


Figure 16

To use the **PostFinance** payment method, configure Ep2-Merchant ID details in [Novalnet Admin Portal](#) as shown below

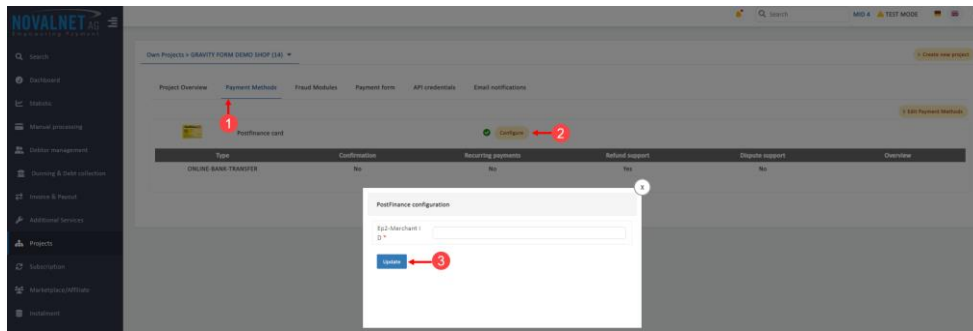


Figure 17

1.4 Payment Configuration in the Gravity Form shop system

Soon after the activation of payment methods in the [Novalnet Admin Portal](#), you must enable those payment methods in your shop system to display them on your Gravity Forms checkout page. Navigate to **Forms → Settings** as shown below

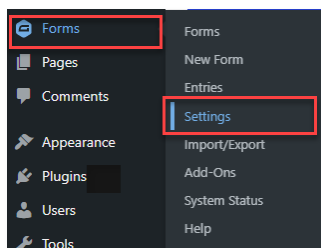


Figure 18

In the settings page, click **Novalnet** tab as shown below

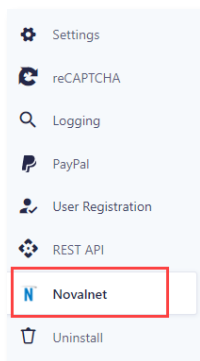


Figure 19

Refer chapter [3 ADDITIONAL CONFIGURATION](#) for more payment configurations.

- ① If you have any recommendations or suggestions for improvement, kindly share your thoughts with us on technic@novalnet.de or call us at +49 89 9230683-19.
- ① Are you happy with our service and support? Please spend a few minutes to share your success [here](#).

2 TESTING AND GOING LIVE

Execute test transactions by navigating to **Forms** → **Choice form settings** → **Novalnet** and check **Enable test mode** at global configuration page. In the test mode the transaction amount will not be charged by Novalnet.

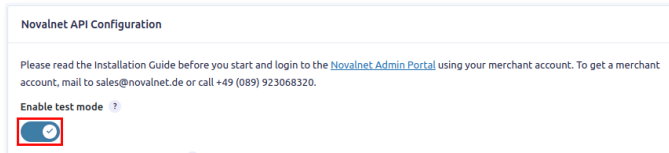


Figure 20

- ① Before going **LIVE**, change the individual payment configurations to update the payment method settings in the shop admin panel.
- ① Refer below URL for the Novalnet test payment data for testing
<https://developer.novalnet.de/testing/>

Execute orders in LIVE MODE

To proceed with **LIVE** orders, don't forget to uncheck/disable the **Enable test mode** option in the individual payment configuration page.

- ① If you have any recommendations or suggestions for improvement, kindly share your thoughts with us on technic@novalnet.de or call us at +49 89 9230683-19.
- ① Are you happy with our service and support? Please spend a few minutes to share your success [here](#).

3 ADDITIONAL CONFIGURATION

3.1 Additional configuration for all the payment methods

For additional payment configuration settings for each payment methods, navigate to **Forms** → **Settings** click **Novalnet** on the left of each payment method and configure the required additional payment settings.

Payment Action (Debit immediately / Reserve funds for later)

☛ This option is available only for **Credit/Debit Cards, Direct Debit SEPA, Direct Debit SEPA with payment guarantee, Instalment by Direct Debit SEPA, Invoice, Invoice with payment guarantee, Instalment by Invoice, PayPal, Apple Pay, and Google Pay.**

You can choose between two options - **Capture** and **Authorize** which are both explained below.

- ① **Capture** - This is the default setting where payments are directly executed, and funds are automatically transferred from buyer's account to the merchant account. This can be changed as per your business requirement.



Figure 21

- ① **Authorize** - Payment details are verified while the funds are reserved, which will be captured later.
- ① **Minimum transaction amount for authorization** - Transactions from this amount will be “authorized” (reserved) only and captured later. Leave the field blank to authorize all transactions.

Payment Action ?

Authorize

Minimum transaction amount for authorization ?

(in minimum unit of currency. E.g. enter 100 which is equal to 1.00)

Figure 22

Payment due date (in days)

Payment due date (in days) refers to the duration (number of days) given for the buyer to complete the payment. The payment process and duration may differ for each payment method.

☛ This option is available only for **Direct Debit SEPA**, , **Invoice**, **Invoice with payment guarantee**, and **Prepayment**.

Direct Debit SEPA

Payment due date (in days) ?

Figure 23

☛ This option is available only for **Barzahlen/viacash**.

Barzahlen

Slip expiry date (in days) ?

Figure 24

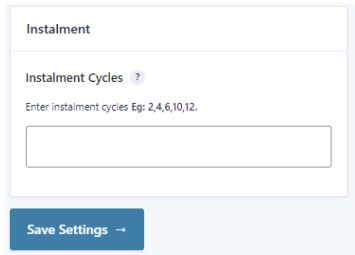
- ① For **Direct Debit SEPA**, enter the number of days after which the payment is debited (must be between 2 and 14 days).
- ① For **Invoice**, enter the number of days given to the buyer to transfer the amount to Novalnet (must be greater than 7 days). If this field is left blank, 14 days will be set by default.
- ① For **Prepayment**, enter the number of days given to the buyer to transfer the amount to Novalnet (must be between 7 days). If this field is left blank, 14 days will be set by default.
- ① For **Barzahlen/viacash**, enter the number of days given to the buyer to pay at a store nearby. If this field is left blank, 14 days will be set by default for slip expiry.

Instalment cycles

Instalment cycle refers to the pre-defined period for partial payments that allow the buyers to pay their full order amount in parts. The intervals or cycles vary based on shop admin configuration.

☛ This option is available only for **Instalment by Direct Debit SEPA** and **Instalment by Invoice**.

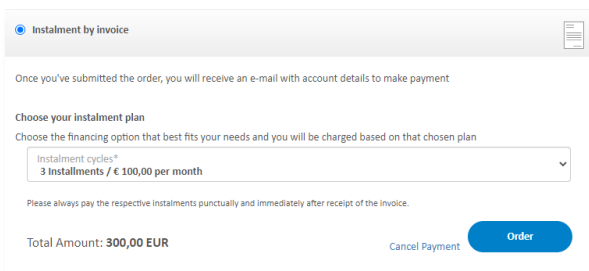
Define which instalment cycles you wish to offer in your shop (e.g., 3 cycles, 6 cycles, 9 cycles, 12 cycles etc.) and click **Save Settings**. The buyer can then choose among these instalment cycles, if they wish to pay in instalments.



The screenshot shows a form titled 'Instalment'. Under the heading 'Instalment Cycles' with a help icon, it says 'Enter instalment cycles Eg: 2,4,6,10,12.' Below this is a text input field. At the bottom of the form is a blue button labeled 'Save Settings' with a right-pointing arrow.

Figure 25

The pre-defined instalment details will be visible for the buyer under the chosen instalment payment method, as shown below



The screenshot shows a payment form for 'Instalment by invoice'. It includes a note: 'Once you've submitted the order, you will receive an e-mail with account details to make payment'. Under 'Choose your instalment plan', it says 'Choose the financing option that best fits your needs and you will be charged based on that chosen plan'. A dropdown menu shows 'Instalment cycles*' with the selected option '3 Installments / € 100,00 per month'. Below this is a disclaimer: 'Please always pay the respective Installments punctually and immediately after receipt of the invoice.' At the bottom, it shows 'Total Amount: 300,00 EUR' and two buttons: 'Cancel Payment' and 'Order'.

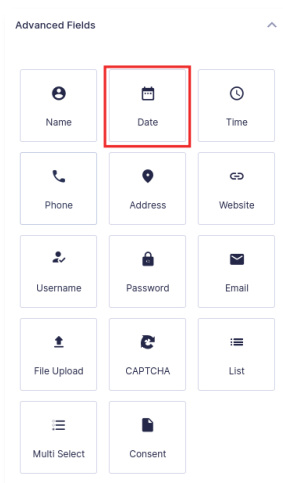
Figure 26

4 CUSTOM FIELD CREATION FOR GUARANTEED PAYMENTS

4.1 Date of Birth Field Creation (B2C)

During the form creation, create the **Date of birth** field, which is **mandatory** to proceed with the guaranteed payments.

Go to **Advanced Fields** → **Date**, drag and drop the date field



The screenshot shows a grid of field options under the heading 'Advanced Fields'. The options include Name, Date, Time, Phone, Address, Website, Username, Password, Email, File Upload, CAPTCHA, List, Multi Select, and Consent. The 'Date' field option, which includes a calendar icon, is highlighted with a red rectangular border.

Figure 27

Choose settings  under the **Date** field.

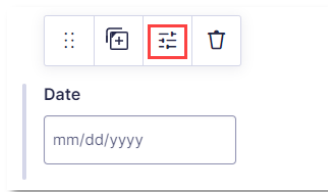


Figure 28

Next, enable the **Required** check box under **General** tab to display **Date of birth** field as a mandatory field in the shop front end.

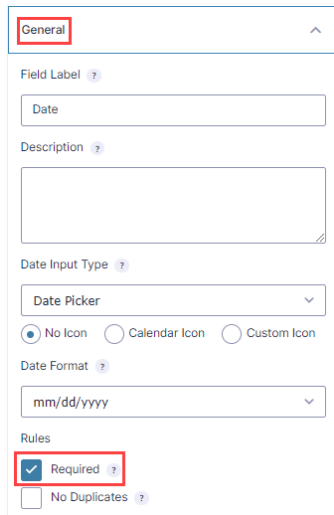


Figure 29

Then, choose **Advanced** tab, under the **Admin Field Label** provide the field name Eg., “**Birth Date**”.

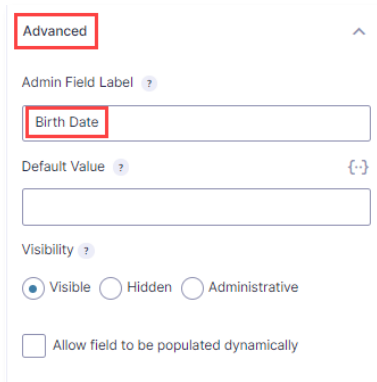


Figure 30

Click  button to update changes.

To view the Novalnet Feeds, go to **Forms**, under the respective form, click **Settings** → **Novalnet** from the list.

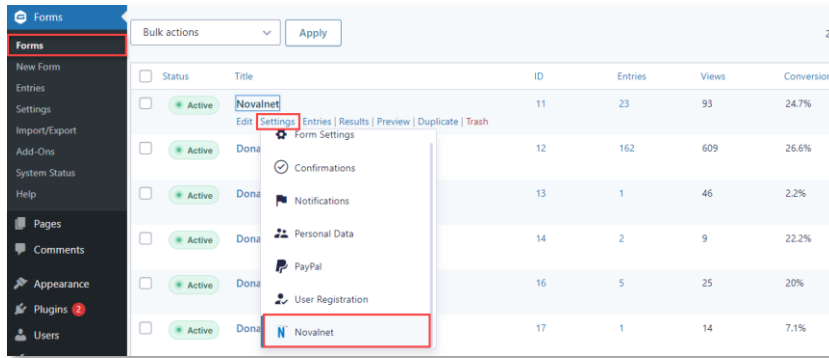


Figure 31

Make sure the **Birth Date** is added to the **Birth Date** field under **Other Settings**.

Other Settings

Billing Information

Field

Form Field

Company Name

Birth Date

First Name

Last Name

Email

Address

Address 2

City

State

Zip

Country

Figure 32

Finally, click **Save Settings** to update the settings.

4.2 Company Name Field Creation (B2B)

During the form creation process, create the **Company Name** field as a mandatory field to proceed with the guaranteed payments for B2B.

Step 1: Go to **Post Fields** → **Custom Field**.

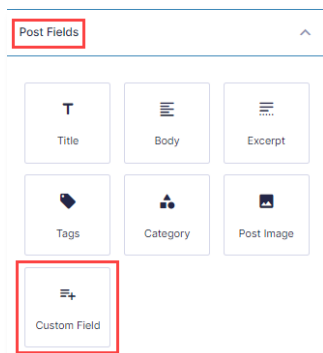


Figure 33

Step 2: Choose settings  under the **Post Custom field** as shown below

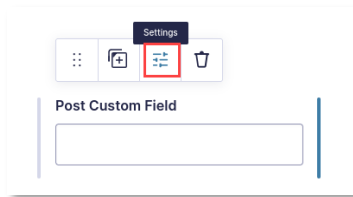


Figure 34

Step 3: Under the **General** tab, edit the “**Field Label**” text as you wish and enable the **Required** option to display the Company Field as a mandatory field in the shop front end.

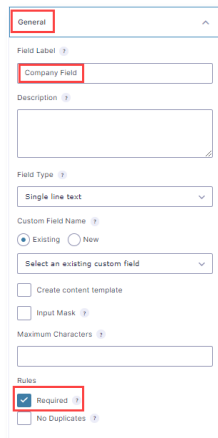


Figure 35

Then, choose **Advanced** tab and enter the Company Name in **Admin Field Label** field.

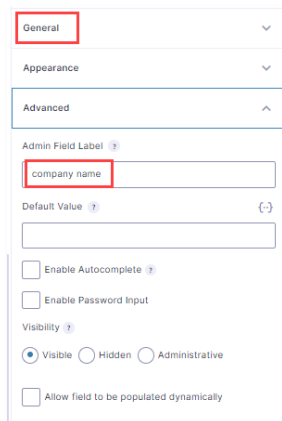


Figure 36

Click  for changes.

To view the Novalnet Feeds, kindly go to Forms, click the respective form and click **Settings** → **Novalnet** from the list.

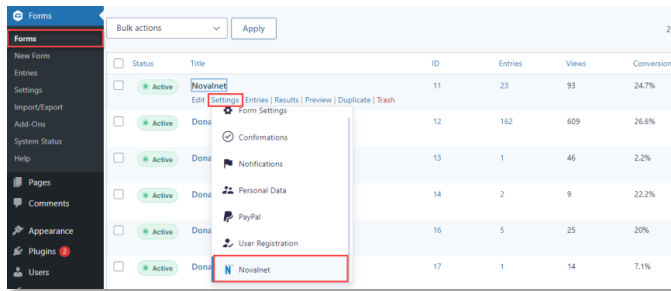


Figure 37

Make sure the **Company Name** is added into the **Company Name** field under **Other Settings**.

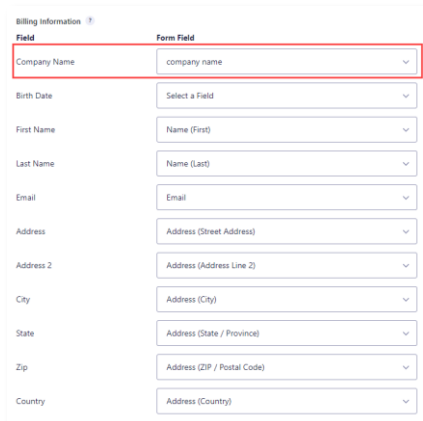


Figure 38

Finally, click **Save Settings** → to update the settings.

5 MANAGING GRAVITY FORMS ADMIN PANEL

5.1 Entries management

To view the entries, kindly go to **Forms** → **Entries** in the shop admin.

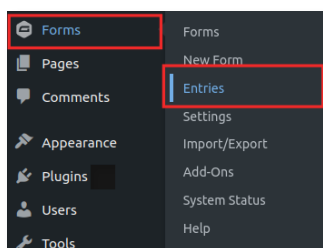


Figure 39

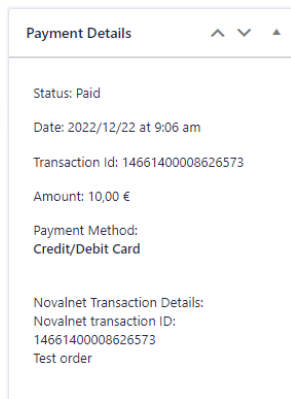
5.2 Entries overview

Click on the required **Entries** in respective form.



Figure 40

Now, you can review the transaction details of the respective entries under **Payment Details**.



Payment Details

Status: Paid

Date: 2022/12/22 at 9:06 am

Transaction Id: 14661400008626573

Amount: 10,00 €

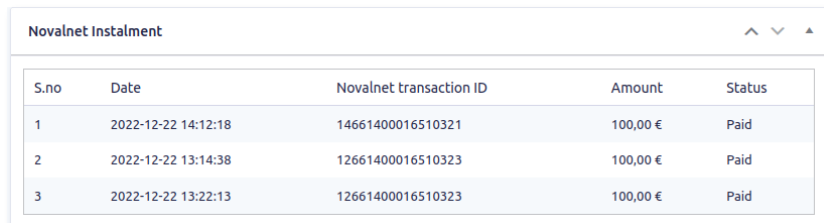
Payment Method:
Credit/Debit Card

Novalnet Transaction Details:
Novalnet transaction ID:
14661400008626573
Test order

Figure 41

5.3 Entries details for Instalment payments

To review the completed and pending payments for a particular instalment order, click the order number and scroll down to the **Novalnet Instalment** section as shown below



S.no	Date	Novalnet transaction ID	Amount	Status
1	2022-12-22 14:12:18	14661400016510321	100,00 €	Paid
2	2022-12-22 13:14:38	12661400016510323	100,00 €	Paid
3	2022-12-22 13:22:13	12661400016510323	100,00 €	Paid

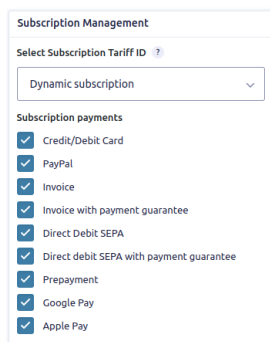
Figure 42

6 MANAGING SUBSCRIPTION

You can create subscription automatically through Novalnet, either based on the predefined settings in the [Novalnet Admin Portal](#) or through the dynamic subscription creation parameters passed during the initial API request and execute automated follow-up debits via supported payment methods. On each successful debits executed by the predefined subscription cycle, a new order is created in your shop system, specifying to the parent **TID** subscription.

Use the **Subscription payments** option in the **Novalnet API Configuration** tab to choose the payment methods you wish to offer for subscription payments.

☛ *This option is only available for **Credit/Debit Cards, Direct Debit SEPA, Invoice, Prepayment, PayPal, Direct Debit SEPA with payment guarantee, Invoice with payment guarantee, Google Pay and Apple Pay.***



Subscription Management

Select Subscription Tariff ID ?

Dynamic subscription

Subscription payments

- ☒ Credit/Debit Card
- ☒ PayPal
- ☒ Invoice
- ☒ Invoice with payment guarantee
- ☒ Direct Debit SEPA
- ☒ Direct debit SEPA with payment guarantee
- ☒ Prepayment
- ☒ Google Pay
- ☒ Apple Pay

Figure 43

Select Subscription Tariff ID

Choose the preferred Tariff ID (unique identifier for the tariff plan) that you created earlier in the [Novalnet Admin Portal](#) for your project's subscriptions.

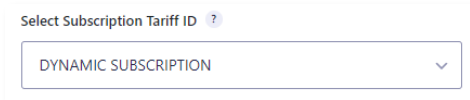


Figure 44

Please visit: <https://developer.novalnet.de/corecompetencies/dynamic> to know more about the dynamic subscription creation in the [Novalnet Admin Portal](#).

Display Subscription Cancellation Option for Buyer

The buyer can cancel the subscription by clicking **Edit** on the subscription order and by clicking **Cancel Subscription**.

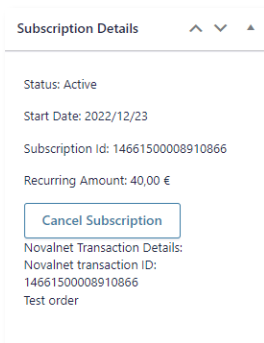


Figure 45

7 UNINSTALLATION

To uninstall the Novalnet Payment Plugin, please follow the steps below.

Step 1: Navigate to **Plugins** → **Installed Plugins** as shown below

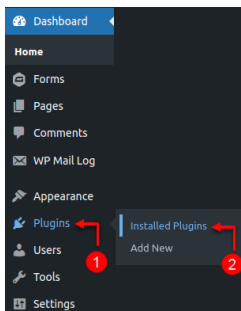


Figure 46

Step 2: Under the plugin **Novalnet payment plugin - Gravity Forms**, click **Deactivate** as shown below

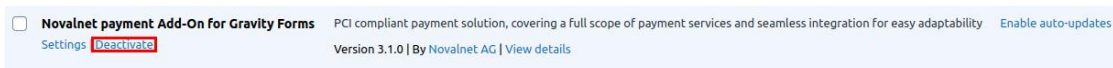


Figure 47

Step 3: After deactivating, click **Delete**.

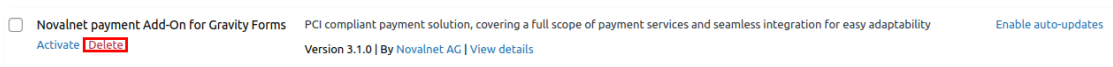


Figure 48

Step 4: Click **OK** to confirm that you wish to delete the Novalnet payment plugin permanently from your shop system.

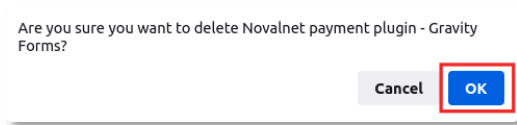


Figure 49

8 TECHNICAL SUPPORT THROUGH NOVALNET

For any questions or further enquiries please contact one of the following departments as per your requirement. Our in-house experts are ready to assist you in case of queries or issues.

For **installation assistance** contact technic@novalnet.de or call +49 89 9230683-19.

For a **merchant account, new payment plugin or additional payment methods**, please contact sales@novalnet.de or call +49 89 9230683-20.

If you have any recommendations or suggestions for improvement, kindly share your thoughts with us to develop our payment plugin further technic@novalnet.de or call us at +49 89 9230683-19.

Are you happy with our service and support? Please spend a few minutes to share your success [here](#).

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