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payolution OXID Modul

## Documentation / Manual
For module version 1.5.1 as at 2021-03-26

Vendor:
payolution GmbH
www.unzer.com/de/unzer-payments

Technical Implementation:
cgrd GmbH
www.cgrd.de

# **Table of Contents**

# Introduction and Overview

## Modulename

payolution OXID Module

## Modulecategory

Payments
This module adds additional payment methods to the OXID eShop.

## Author, Link and Contact Mail

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## Module description

payolution integrates the payment methods „Instalment", „Invoice (consumer)", „Invoice (company)" and Direct Debit into the OXID eShop. After appropriate configuration users may choose one of these additional payment options when arriving on the payment selection page. Depending on the chosen option user might have to specify additional data as for instance birthdate or for direct debit payments the account details, for companies the registration number or the desired duration for instalments. On the basis of this data the user will get checked in realtime – if the result is positive, the user may complete the purchase. Using the OXID administration back-end the merchant may afterwards report the delivery and register returns. The shop will submit the correspondent operations to payolution using the interface.

## Supported countries and payment methods

The payolution payment methods are available in the following countries:

Direct debit: DE, AT
Instalment: DE, AT, CH, UK
Invoice (company): DE, AT, CH
Invoice (consumer): DE, AT, CH, NL

# Getting Started

## Security Advice

We recommend for your own safety to create a **backup**, both of your shop files as of your mysql-database, before starting the installation, so you preserve the opportunity to rollback all your changes.

Hint: Best-practise is to prepare the installation including all necessary template changes on a stage-system first, before altering your productive system.

## System Requirements

This manual describes a fresh installation of the payolution Module for the OXID eShop Community Edition, Professional Edition or Enterprise Edition from version 6.0.1.

**Do not install this module, if you are using a different OXID eShop version!**

If you have been using a previous payolution OXID Module in your shop, you will have to uninstall that old module first.

The server, which you plan to use with the payolution OXID Module, has to adhere the OXID server- and system requirements, of course:

https://docs.oxid-esales.com/eshop/en/6.2/installation/new-installation/server-and-system-requirements.html

The payolution OXID Module is compatible with PHP versions 7.1, 7.2, 7.3 and 7.4.

The OXID standard themes flow and wave are supported.

The following additional PHP libraries are also required:

- Curl

# Step-by-step module installation

To install the payolution OXID Module in your shop please realise the following steps in the given order:

## 1. Edit composer.json file

The installation for OXID6 is done using composer. Please add the following line to the central composer.json file of your project within the section „require":

```
"topconcepts/oxid-payolution-6": "v1.5.1"
```

## 2. Run composer update

Run the following command on the console of your server:

```
composer update
```

## 3. /tmp folder

Please delete all files from the /tmp folder of your shop.

## 4. Please log in

Please log in to the OXID admin back-end.

## 5. Activation

1. Go to „Extensions" -> „Modules" -> „payolution" -> „Overview" and click the button „Activate"
2. Please log off from the OXID admin back-end (logout)
3. Please once more delete all files from the /tmp folder of your shop
4. Re-Login to the OXID admin back-end

## 6. Database updates

Choose the freshly created menue-item „payolution" and click on „Start". Now the database will be checked, required fields and tables will be added. Success messages will appear on the screen.

Hint: If the module has already been installed, clicking on "Start" will show you the version number of the currently installed payolution OXID Module. Moreover you will find contact details and a download-link for the latest copy of the payolution OXID Modul manual.

## 7. Module Configuration

Now go to "payolution" -> "Configuration" and enter all necessary settings. Please enter your login credentials and channel data, which payolution provided to you.

Please also check the page "JavaScript instalment library" and update initially the javascript library required by payolution by clicking the button.

Make sure webserver has write permissions to folder modules/tc/payolution/out/src/js/libs/payolution.

Detailed annotations regarding module configuration can be found in the chapter "Configuration" within this manual.

## 8. User-groups

Please assign user-groups to the freshly added payolution payment methods in the section „Shop Settings" -> „Payment Methods", just in the same way as you would configure it for any other payment method in OXID eShop.

**Important:**

Please make sure to specify as "Purchase Price (€) - from … to ..." a minimum, which is equal or higher than the amount, which you specified in the module configuration at the menue-item "Payolution" in the chapter "Other settings" for "Minimal instalment amount". The maximum amounts on the other hand should be equal in both sections.

## 9. Shipping settings

Please assign the freshly added payolution payment methods to shipping settings in the section „Shop Settings" -> „Shipping Methods", just in the same way as you would configure it for any other shipping method in OXID eShop.

## 10. Sub-shops

If you are using OXID Enterprise Edition, please repeat the steps 4) to 9) for every single sub-shop.

## 11. Delete files from /tmp folder

Please once more delete all files from the /tmp folder of your shop.

## 12. Inspect your shop-templates

We recommend to compare and tick off all pages listed in the chapter "Structure and functionality" within this manual with your shop-templates, to ensure that both all contents and all legally required modifications for usage of the payolution Module for OXID have been implemented in a fully visible and functional way in your web-shop.

Hint: This is especially important, if you are using a different template in your web-shop as the "Azure" or "Flow Theme" standard themes which are generally shipped by OXID, or if you are using an individual or modified template or if you have removed or changed any OXID blocks from one of the default templates on your own.

## 13. Perform a test transaction

Please test the new payolution payment methods in your shop first, before activating it for all shop customers.

Prior to the Go-Live of the payolution payment methods please contact payolution integrations team, who will perform an approval cycle together with you.

## 14. Done

Congratulations! Your web-shop has now been configured to offer payolution payment methods. You are ready to start!

# Additional installation advices

## Multilingualism

If you are offering more than the languages English, German and Dutch in your shop, then you will have to copy the provided payolution language files (e.g. "de/payolution_lang.php") even to the other language folders of the shop and modify them accordingly. This payolution OXID extension is provided only with English, German and Dutch language support per default. By adding corresponding translations to the provided unencrypted *lang*-files you can simply add any languages. Please remember to even translate the names of the payment methods in the OXID admin back-end therefor you can use the button "Copy to ... ".
Unfortunately the content of the input-field "Fields" will not be copied to the target language. You have to copy and save the list of the used dynamic fields manually to each language and each payolution payment method.

Content of the input-field "Fields":

payolution_installment_birthday
payolution_installment_privacy
payolution_installment_iban
payolution_installment_account_holder
payolution_installment_period
payolution_b2c_privacy
payolution_b2c_birthday
payolution_b2c_phone
payolution_b2b_ust_id
payolution_b2b_privacy
payolution_b2b_birthday
payolution_b2b_phone
payolution_dd_birthday
payolution_dd_privacy
payolution_dd_holder
payolution_dd_iban
payolution_dd_mandate

# Configuration

In this chapter you will find annotations about the required and other possible settings for installation and configuration of the payolution OXID Module using the OXID eShop Admin back-end area. To access these settings please log in to the admin back-end of your OXID eShop as usual.

## Main menu

In the eShop admin main menu the new link "payolution" will appear on the left side with several sub-menu entries:
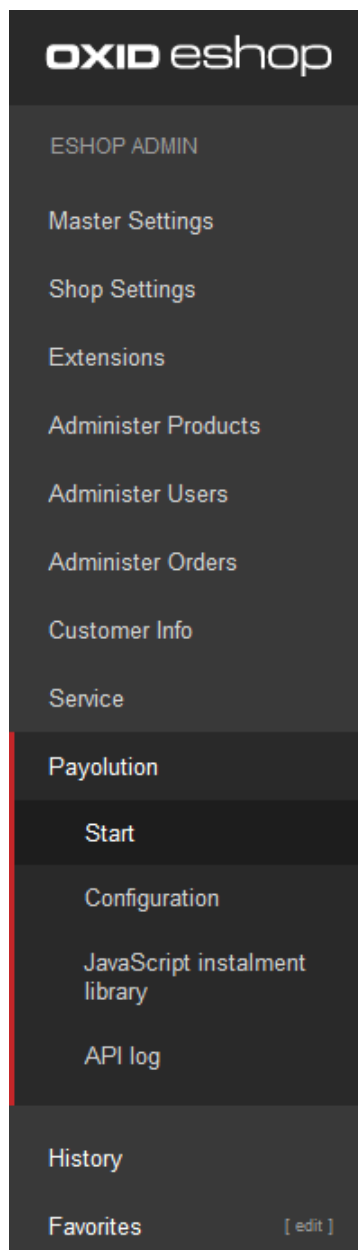
# Start

During the module installation (see above) you will initially have to click on the link "Start", to automatically update the database and module settings. If the installation has already been successfully completed, you will just see the version number of the currently installed module at the page top.



Additionally you will find payolution contact details and the download link to access the latest manual matching module version:

The download-link is:

https://www.cgrd.de/customer/payolution/payolution-for-oxid-en-1.5.1.pdf

# Configuration

Click on the link "Configuration" to see the following page. You will have to make important settings here to get started with the payolution OXID Module. We will describe these settings below. You can find more information in the OXID admin back-end using the tool-tip help, by clicking the question mark icon next to each setting.

At the page bottom you will find the button "Save". Please remember to save all your changes to make them effective.

## Configuration

Here you can configure the basic settings to use with the Payolution Checkout extension for OXID. For a detailed description of the different settings please see the tool-tip funktion, see the documentation or contact Payolution Integration Support.

**Extension mode:**  Test Server  ?

### ⊖ Login-Data

| Login | Login | ? |
| Password | Password | ? |

### ⊖ Optical settings

| Show instalment rates on details page | Yes | ? |
| Show instalment rates on catgory/list pages | Yes | ? |
| Show instalment rates on promotions on shop homepage | Yes | ? |
| Show instalment rates in basket view | Yes | ? |

### ⊖ Other settings

| Allow alternative shipping address | No | ? |
| Enable logging | Off | ? |
| BCC e-mail address | Your-Mail@adress | ? |
| Minimal instalment amount | 200 | ? |
| Maximum instalment amount | 999999 | ? |
| Base64 encoded company name | Base64 encoded company name | ? |

### ⊖ Bank details for invoice

| Country | Default | ? |
| Receiver | | ? |
| IBAN | | ? |
| BIC | | ? |

SAVE

## Login-Data

| Extension mode | Choose "Live Server" for productive mode, unless you got a different information from payolution. Below you may specify logindata for both test- and live-environment separately. |
|---|---|
| Login | You will receive this data from payolution. Test- and live-data differ. |
| Password | |

## Optical settings

| Show instalment rates on details page | Activates/deactivates display of instalment calculator on product details page. |
|---|---|
| Show instalment rates on catgory/list pages | Activates/deactivates display of instalment calculator on category/list page. |
| Show instalment rates on promotions on shop homepage | Activates/deactivates display of instalment calculator on promotions on homepage |
| Show instalment rates in basket view | Activates/deactivates display of instalment calculator on basket page. |

## Other settings

| Allow alternative shipping address | Whether or not different shipping and billing addresses are allowed. This option is disabled by default and can only be changed directly in database. Contact payolution if required. |
|---|---|
| Enable logging | Activates/deactivates logging |
| BCC e-mail address | BCC e-mail address, to which copies of generated OXID Payolution invoices and order confirmation e-mails will be e-mailed as BCC |
| Minimal instalment amount | Specify the minimum amount for which the instalment calculator will be displayed. **Caution!** This value should be equal or lower than the value specified for the payment method "Instalment" in the OXID payment method settings |
| Maximum instalment amount | Specify the maximum amount for which the instalment calculator will be displayed. **Caution!** This value should be equal to the value specified for the payment method "Instalment" in the OXID payment method settings |
| Base64 encoded company name | You will receive this data from payolution. Base64 encoded company name. |

## Bankdetails for invoice

| Country | Please pick the country for which you want to specify bank details. You can add more countries to this list by activating them in the Countries section of the OXID Master Settings. |
|---|---|
| Receiver | Please specify the name of the receiver / account holder |
| IBAN | Please enter the IBAN code, which should be stated on PDF invoices. |
| BIC | Please enter the BIC code |

# JavaScript instalment library

Here you can initially download the payolution JavaScript instalment library or update it.

## JavaScript installment library

Here you can update Payolution installment JavaScript library.
Library was last time updated on **2015-02-23 11:43**.

**UPDATE**

The JavaScript library includes specially customized conditions for your company for the calculation of instalments, for instance which periods will be offered at which rates. The JavaScript library will be used in the front-end of your store, whenever the instalment calculator will be opened.

Once a day the JavaScript library will update automatically. The update mechanism will be triggered by a random visitor of your shop front-end. If the last successful update of the library was more than 24 hours ago, the update will be started automatically.
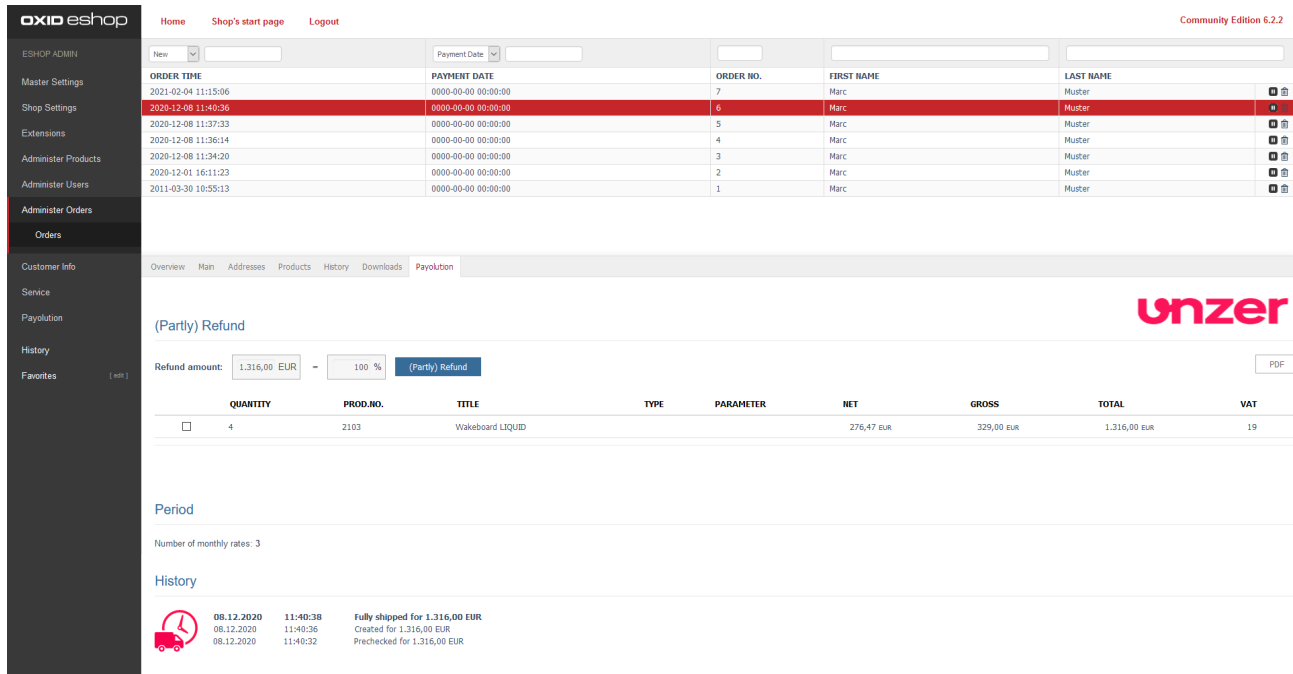
Make sure webserver has write permissions to folder modules/tc/payolution/out/src/js/libs/payolution.

# API Log

Here you can see an overview of the communication between OXID eShop and payolution. The log entries are ordered chronologically. You can browser through the different pages. A click on a row will reveal the details of the corresponding API-Call in the windows below, each with parameters for the request and the whole payolution response.

# Manage payolution orders in the shop

After the installation of the payolution OXID module a new tab „payolution" appears in the „Orders" menu after selection of an appropriate payolution order.



During the check-out process in the shop front-end a corresponding payolution transaction will be created upon positive response from payolution for each customer. To actually get paid for orders, you will have to inform payolution when shipping out goods. Only in case of instalments a ship-out notice will be sent to payolution automatically. You can inform payolution about a ship-out using the OXID admin back-end. Alternatively you can also use the business intelligence platform (BIP), an API or extended interfaces to ERP- or logistics software.

Using the buttons "Full cancellation" or "Full delivery" you can either delete the current transaction before ship-out, or report the ship-out to payolution. If you would only like to report single items of the order as "shipped out", then you'll have to check the check-box in front of each item, enter the quantity if desired, and confirm by clicking the button "Partial delivery" appearing in the right bottom corner.

Afterwards you can register returns or partial returns in exactly the same way using the OXID admin back-end. You can even grant a discount to the customer subsequently.

After the ship-out notice you can click the button "PDF" in the upper right corner to download an invoice PDF document. You may print the document and send it to the customer, by postal mail or e-mail. (Please note: The PDF printing feature is only available for OXID Community Edition and Professional Edition; there is no such feature in the OXID Enterprise Edition).

# Structure and functionality

Installation of payolution OXID Module has massive impact on the front-end of the web-shop. By comparing your shop template to the following screenshots you should check if the module has been properly installed in your shop, especially if you are using individualized shop-templates:

## Homepage

On the front page of the shop a payolution monthly rate and a link to an example calculation will appear next to all products which may be purchased by instalment:



You can hide the payolution monthly rates by editing "Optical Settings" -> "Show instalment rates on promotions on shop homepage ".

# Category view / List view / Search Result list

In the product lists the payolution monthly rates and a link will be included next to the prices. This can be hidden using „Optical settings" -> „Show instalment rates on catgory/list pages".

# Product details pages

If payolution payment method "Instalment" has been activated, here the monthly rate and a link to an example calculation will be displayed here. These rate details can be hidden using „Optical settings" -> „Show instalment rates on details page".

# Basket view

If payolution payment method "Instalment" has been activated, below the grand total the monthly rate and a link to an example calculation will be displayed. These rate details can be hidden using „Optical settings" -> „Show instalment rates in basket view".
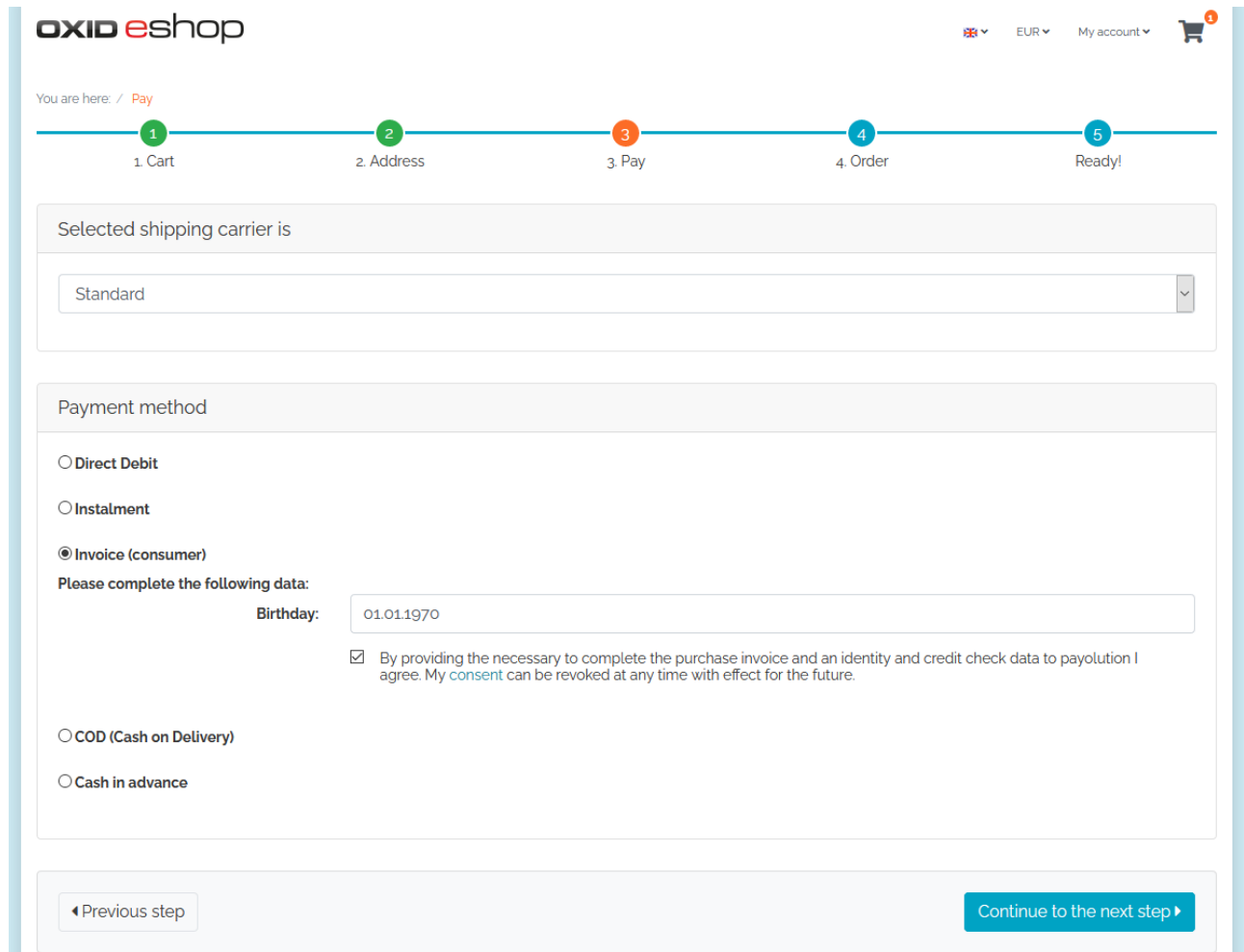
# Payments selection page

On the "default" payments selection page of the web-shop depending on the configuration of the OXID eShop payment methods "Instalment", "Invoice (consumer)", "Invoice (company)", "Direct Debit" and all other payment methods like cash in advance, cash on delivery or PayPal will be shown.

Hint: The payments selection page has remained completely untouched, so it corresponds with OXID default and even other payment modules from third-party vendors can be smoothly installed and used.



If not all required data has been entered by the customer in the previous step (such as birth date), so additional form fields will appear next to the payolution payment methods. At least the consent to data protection terms and conditions needs to be confirmed by ticking a checkbox.

# Connecting to external ERP-Systems

If you want to process payolution orders in a downstream ERP-system, such as the mail order selling software pixi*, in SAP Business One or in MS Dynamics NAV, then you will have to assure that the following fields will be submitted to these systems:

Table: OXORDER          Fieldname: PAYO_PREAUTH_ID

Table: OXORDER          Fieldname: PAYO_REFERENCE_ID

These two fields will be needed to continue processing (like for instance captures or credits) from an external ERP-system referencing the corresponding payolution transactions.

# Updates of the payolution OXID Module

Updates of the payolution OXID Module will be published to the github repository at:

https://github.com/topconcepts/OXID-Payolution-6/

You can see the current version of your installed module, when you go to „payolution" in the OXID Admin area and click „Start".


# Support for the payolution OXID Module

If necessary, you get support for installation, configuration, or in the daily operation of your module directly from payolution. To do so please contact your personal payolution integration manager or send an e-mail to integration-vie@unzer.com .

# Changelog of this manual

| | |
|---|---|
| 2015-02-23 | Initial Release |
| 2015-03-02 | Version Update 1.0.3 - No changes to documentation |
| 2015-03-27 | Version Update 1.0.4 - No changes to documentation |
| 2015-04-07 | Version Update 1.0.5 - No changes to documentation |
| 2015-04-13 | Version Update 1.0.6 - No changes to documentation |
| 2015-04-20 | Version Update 1.0.7 - No changes to documentation |
| 2015-04-28 | Version Update 1.0.8 |
| | Information about matching of Minimal instalment amount with payment method configuration added. |
| 2015-05-22 | Version Update 1.0.9 |
| | Removed chapter "ISO Character Set Support" |
| 2016-08-01 | Version Update 1.1.0 |
| | Configuration for Direct Debit added, Screenshots updated, small fixes |
| 2017-07-01 | Version Update 1.2.0 |
| | New Configuration section Bankdetails for invoice added |
| 2017-08-24 | Version Update 1.3.0 – No changes to documentation |
| 2018-01-26 | Corrected a mistake in step-by-step tutorial in step 2 |
| 2018-09-05 | Version Update 1.4.0 |
| | Version Update 1.4.1 |
| 2019-06-11 | Version Update 1.4.2 |
| | Added note about write permissions for javascript download |
| 2021-02-15 | Version Update 1.5.0 |
| | Refresh of screenshots, Unzer rebranding |
| 2021-03-26 | Version Update 1.5.1 – No changes to documentation |