



User Manual

PostFinance Checkout Flex Payment Plugin v17.0



Table of Contents

| | |
|--|----|
| 1. Introduction | 3 |
| 2. Features | 3 |
| 3. Screenshots..... | 4 |
| 4. Brief description | 10 |
| 5. Technical Requirements / Compatible With: | 11 |
| 6. Limitations..... | 11 |
| 7. Changes Log / Release Notes..... | 11 |
| 8. Support | 11 |

1. Introduction

PostFinance Checkout Flex extension from PIT Solutions is a connector between PostFinance Checkout Flex and Odoo Web Shop. It is a standardized way to accept payments via a multitude of different payment providers in the world. It also supports payment gateways such as PostFinancePay, TWINT, Paypal, Online Banking, and Credit/Debit Card. More information can be found under PostFinance Checkout Flex.

The extension connects Odoo Shop users to the payment hub, which has more than 50 payment gateways and processors linked to it. The connector works with the help of the Rest API. This reduces the tendency of customers abandoning their cart when their preferred payment gateway is missing on the payment page. It also connects the user to the different payment service provider APIs, thereby lowering the payment routing costs.

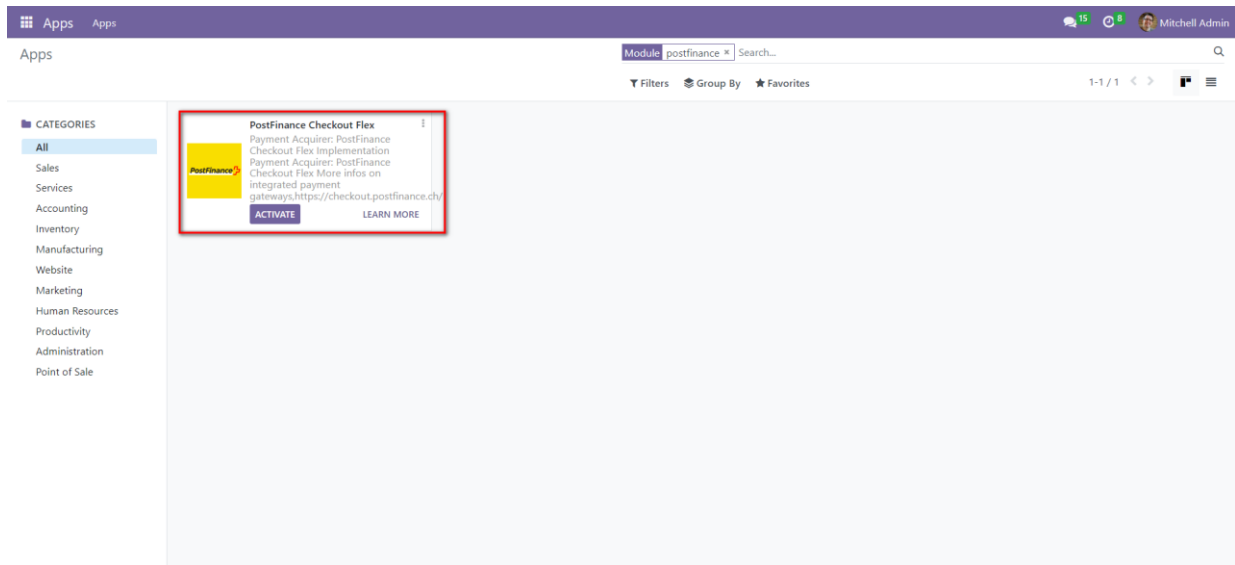
2. Features

- Easy to install.
- Flexible.
- User-friendly and configurable as per one's requirements.
- Multiple payment methods.
- Maintain Transaction.
- I-frame Integration.
- Support payment gateways such as PostFinance pay, TWINT, Paypal, Online Banking, Credit/Debit Card.
- Payment methods are available for the payment processors: Wordline, TWINT, Postfinance Acquiring, and PayPal.

3. Screenshots

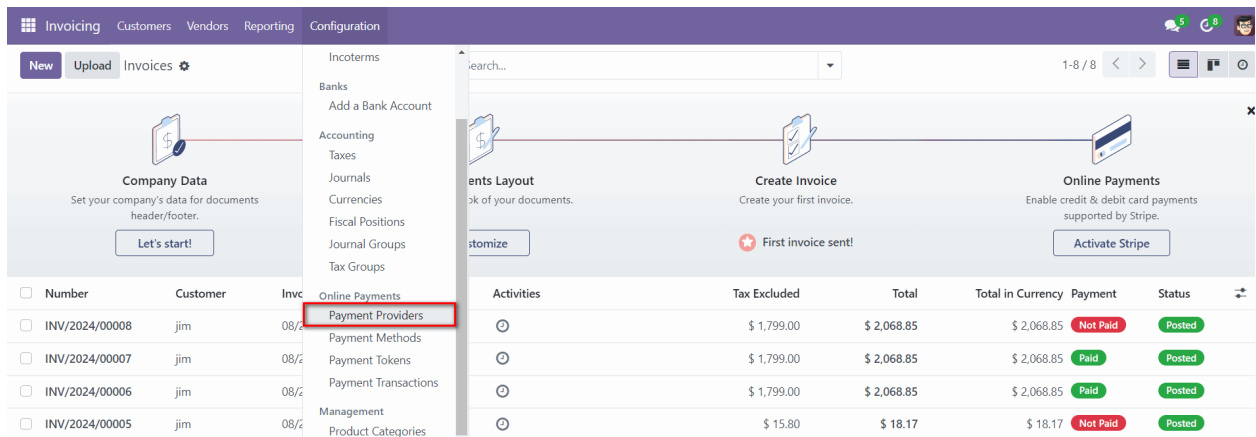
Install the PostFinance module:

- Go to *Apps* -> Search for PostFinance.
- Click *Activate*.



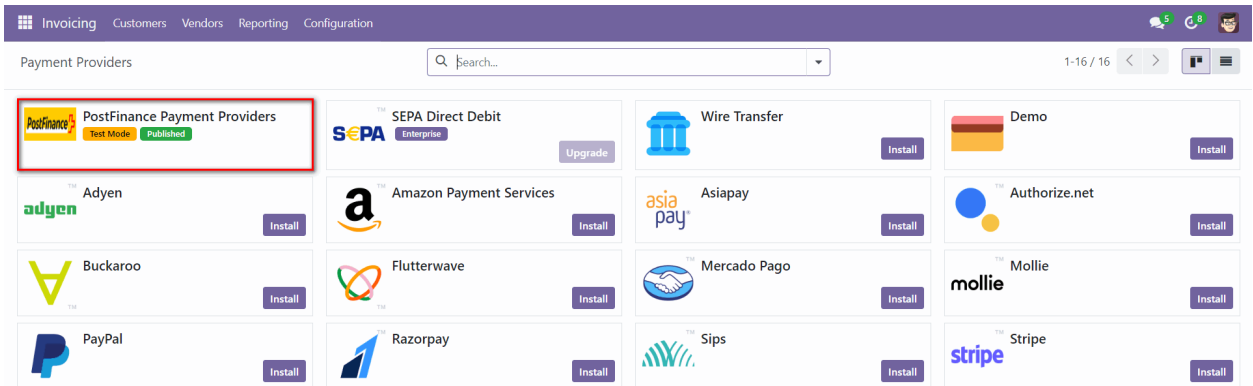
Screenshot 1: PostFinance app activation

- Go to *Invoicing* module -> *Configuration* -> Select *Payment Providers*.



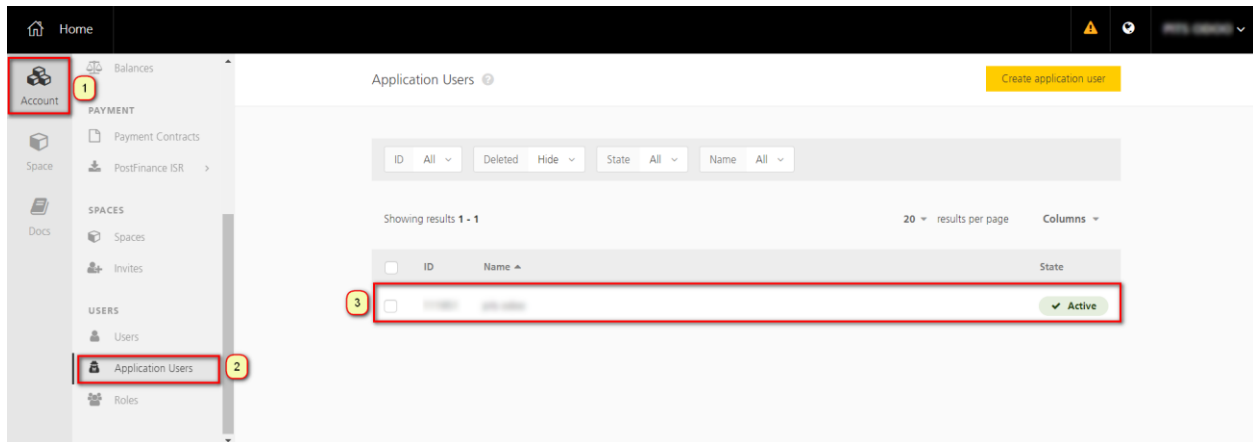
Screenshot 2: Payment Providers menu item

- Click on *PostFinance Payment Providers*.



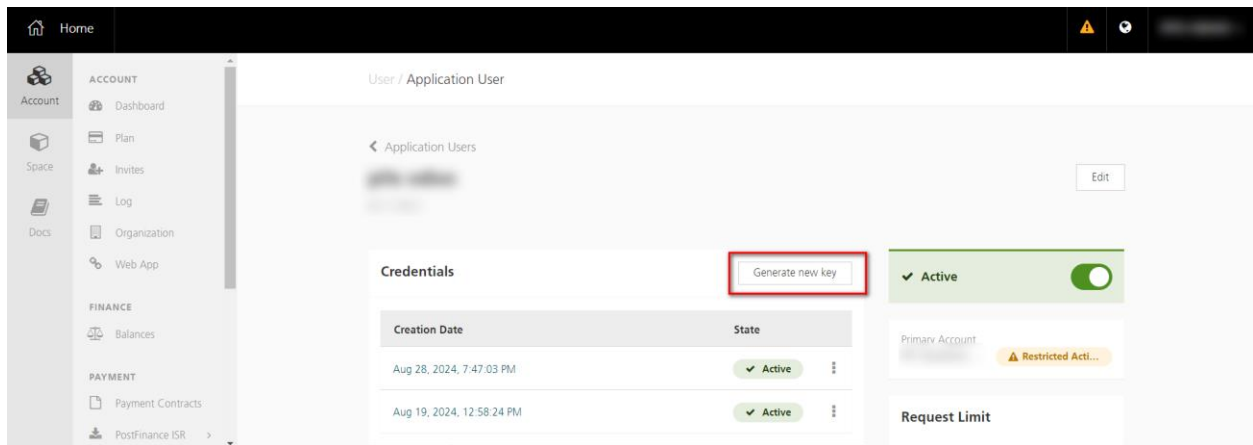
Screenshot 3: PostFinance Payment Provider

- Go to <https://checkout.postfinance.ch/> -> Login.
- Navigate to *Account* -> *Application Users* -> *Open User* -> Copy the ID.



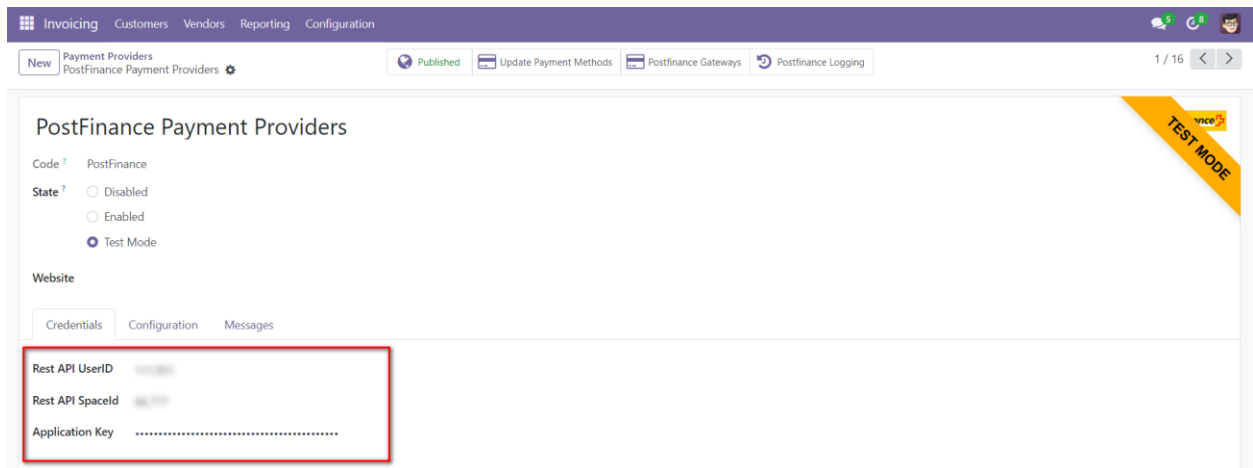
Screenshot 4: PostFinance Account Page

- Generate new key -> Copy the generated key.



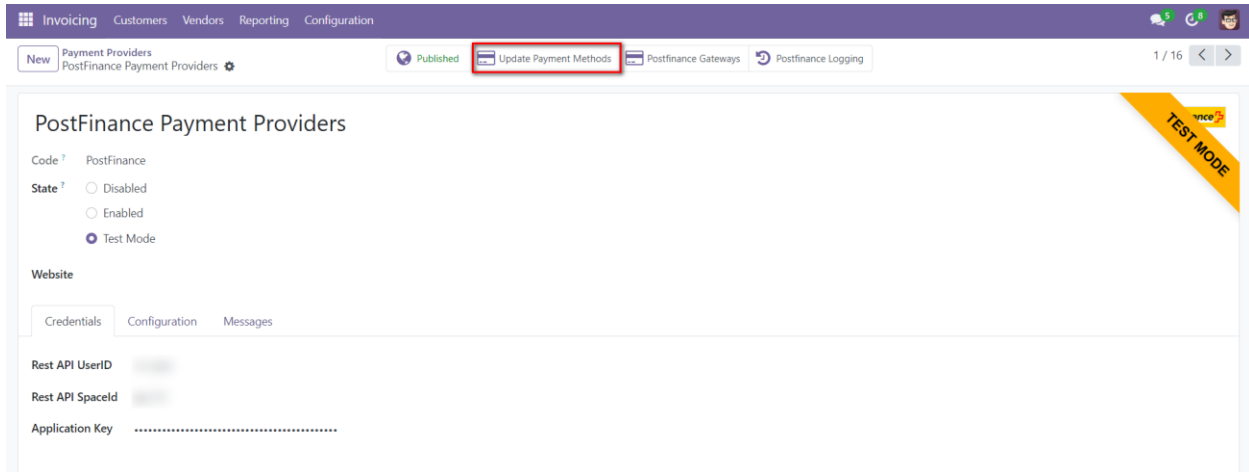
Screenshot 5: PostFinance New key Generation

- Go to Spaces -> Fetch the Space ID.
- Enter the Rest API UserID, Rest API Space ID and Application Key to PostFinance payment provider configuration in Odoo backend.
- Move the payment provider to desired state and publish the provider.



Screenshot 6: PostFinance configuration in Odoo backend

- Click on Update Payment Methods smart button to sync payment methods data from PostFinance back-office.



Screenshot 7: PostFinance Update Payment Methods

- Go to Website -> Shop.
- Add items to cart -> Go to Cart.
- Click *Process Checkout*.

Confirm order

Billing: [redacted] [Edit](#)
Shipping: [redacted]

Choose a delivery method

Standard delivery Free


Pay with

CHOOSE A PAYMENT METHOD

Credit / Debit Card - ONSITE 

PayPal 

PostFinance Pay 

| | | |
|---|------------------------------|-----------------------|
|  | 1 x Conference Chair (Steel) | \$ 33.00 |
| Delivery | | \$ 0.00 |
| Subtotal | | \$ 33.00 |
| Taxes | | \$ 4.95 |
| Total | | \$ 37.95 |
| Discount code... | | Apply |
| Pay now | | |
| or | | |
| Back to cart | | |

Screenshot 8: Process Checkout Page

- Select the desired payment method -> Click *Pay Now*.

Powered By Postfinance Interface ×

▼ Simulation ×

You can use the test information to simulate payments.

Manually enter your card details:

Card Number *

Expiry Date *



Security Code *

Store the card details for future use.


Confirm

Close

Screenshot 9: Onsite payment using iframe for Credit/Debit Card payment method

← Cancel payment  

39.73 CHF



| | | | | |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

The TWINT processor is configured to simulate the payment. As such please choose the result which should be simulated.

Simulate Success

Simulate Failure

Screenshot 10: Offsite payment using TWINT payment method

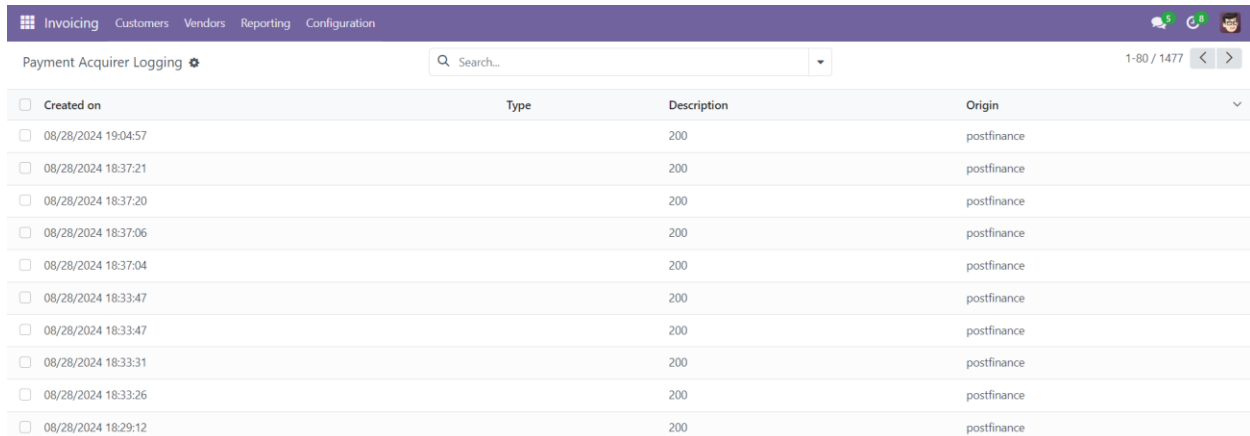
The screenshot shows a payment success page. At the top left is the 'YourLogo' and navigation links 'Home Shop Contact us'. At the top right are icons for a shopping cart, search, phone (+1 (650) 555-0111), and a 'Contact Us' button. The main content area features a 'Thank you for your order.' message with a 'Print' button and 'Order S00102'. Below this is a 'Payment Information' section showing 'PostFinance Payment Providers' with a 'Total: \$ 37.95'. A green banner states 'Your payment has been successfully processed.' Below this are fields for 'Billing:' and 'Shipping:'. On the right, a table lists the order items: '1 x Conference Chair (Steel)' for \$33.00, 'Delivery' for \$0.00, 'Subtotal' for \$33.00, 'Taxes' for \$4.95, and a 'Total' of \$37.95.

Screenshot 11: Payment success page

The screenshot shows a payment cancel page. The layout is identical to Screenshot 11, but the green success banner is replaced by a red banner stating 'Your payment has been cancelled.' The 'Payment Information' section still shows 'PostFinance Payment Providers' with a 'Total: \$ 37.95'. The table on the right remains the same, listing the order items and their prices.

Screenshot 12: Payment Cancel Page

- Go to *Invoicing* -> *Payment Providers* -> Open *PostFinance Payment Provider*.
- Click on *PostFinance Logging*.



| Created on | Type | Description | Origin |
|--|------|-------------|-------------|
| <input type="checkbox"/> 08/28/2024 19:04:57 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:37:21 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:37:20 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:37:06 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:37:04 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:33:47 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:33:47 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:33:31 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:33:26 | | 200 | postfinance |
| <input type="checkbox"/> 08/28/2024 18:29:12 | | 200 | postfinance |

Screenshot 13: PostFinance Log History

4. Brief description

For smooth working of this plugin, there are few configurations which are to be done in the backend. Setting up PostFinance acquirer configuration is the initial step where the User ID, Space ID and Application key of your PostFinance flex account must be provided. Once the configuration is set, activate the provider and continue shopping. The PostFinance flex payment methods will be listed in the shop payment page. Choose the PostFinance payment method and pay from the payment method page or the payment popup window and get back to the Odoo Webshop.

Initial step-by-step description

Prerequisites: Before integrating the PostFinance payment acquirer plugin make sure that you have a PosFinance account in <https://checkout.postfinance.ch/> - This website helps in easy verification and transaction processing.

Step 1: PostFinance account and Payment Acquirer configuration.

Step 2: Activate/Publish/Enable PostFinance Payment Provider.

Step 3: Go to the e-commerce website -> Add products to cart -> Proceed to checkout.

Step 4: Choose the PostFinance flex payment method and click Pay now.

Step 5: Complete the transaction by filling out the necessary details in the payment page/popup.

Step 6: The order is placed on successful payment transaction.

5. Technical Requirements / Compatible With:

- Compatible with Odoo version 17

6. Limitations

- The extension is not multi-website compatible.

7. Changes Log / Release Notes

Version 2.0.1: August 2024

- Iframe loading and address mapping bug fixes

Version 2.0.0: August 2024

- Added Onsite payment methods

Version 1.0.0: January 2024

- Initial version.

8. Support

If you have questions, use our contact form at webshopextension.com or email at support@webshopextension.com.