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User Manual

Wallee Payment Provider Plugin for Odoo v18.0

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## 1. Introduction

The Wallee payment provider extension from PIT Solutions acts as a bridge between Wallee and the Odoo Web Shop, offering a standardized solution for accepting payments through a wide range of global payment providers.

Key Characteristics include:

- **Unified Payment Gateway:** This extension centralizes payments through a single gateway, enabling transactions with numerous providers including Credit/Debit Card, PostFinance E-Finance, PostFinance Card, PostFinance Pay, TWINT.
- **Comprehensive Payment Processing:** Wallee goes beyond basic payment processing by providing additional features such as reconciliation services.
- **Broad Payment Network:** It connects Odoo Shop users to a payment hub that integrates with over 50 payment gateways and processors, ensuring a broad array of payment options.
- **Efficient Integration:** Utilizing REST APIs, the connector helps reduce cart abandonment by providing customers with their preferred payment methods and lowers costs through optimized payment routing.

This extension significantly enhances the payment experience for Odoo Shop users, offering flexibility and cost-effectiveness while offering a wide variety of payment options.

## 2. Features

- **Easy to Install:** Quick and straightforward installation process.
- **Flexible:** Adapts to various business needs and payment requirements.
- **User-Friendly:** Intuitive interface and configurable settings to match individual preferences.
- **Unified Payment Gateway:** Centralized payment processing through a single gateway.

- **Multiple Payment Methods:** Supports a wide range of payment options including Credit/Debit Card, PostFinance E-Finance, PostFinance Card, TWINT.
- **Transaction Management:** Efficiently handles and maintains transaction records.
- **Customizable Notifications:** Allows for tailored system notifications.
- **Multi-Website and Multi-Space Support:** Configurable for multiple websites and spaces.

### 3. Working

The Wallee back-end offers flexible configuration options to tailor the payment experience:

**Payment Method Management:** Admins can define which payment methods are available to users, customizing the payment options as needed.

**Payment Completion Process:** Admins have the choice to redirect users to the payment service provider's site for transaction completion or handle payments within the shop site using an I-frame. The method of handling payments (redirection, I-frame, or both) depends on the capabilities of the payment service provider.

**Enhanced Security with 3D Secure:** Admins can enable 3D Secure functionality to add an extra layer of security during the checkout process. When enabled, users will be directed to the 3D Secure service of the payment method to handle their payment details securely.

**Customizable Notifications:** Admins can adjust notification contents for various payment statuses such as pending, completed, or canceled. Additionally, system notifications like help messages and order completion thank-you messages can be customized.

**Editable Documents:** Order emails, invoices, reminders, packing slips, and other related documents can be modified to fit specific formats and requirements.

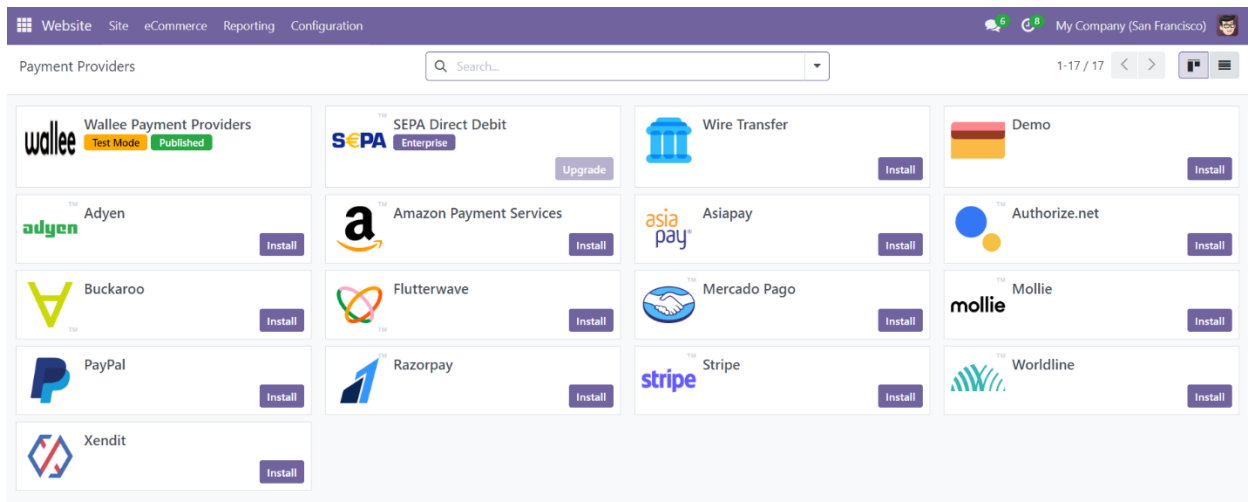
These features ensure a flexible, secure, and tailored payment experience for both administrators and users.

### 3.1 Odoo Backend Configuration for Wallee

You can access the payment providers through the following menu options:

- *Invoicing > Configuration > Payment Providers*
- *Website > Configuration > eCommerce > Payment Providers*

These paths will direct you to the configuration settings for managing payment providers.

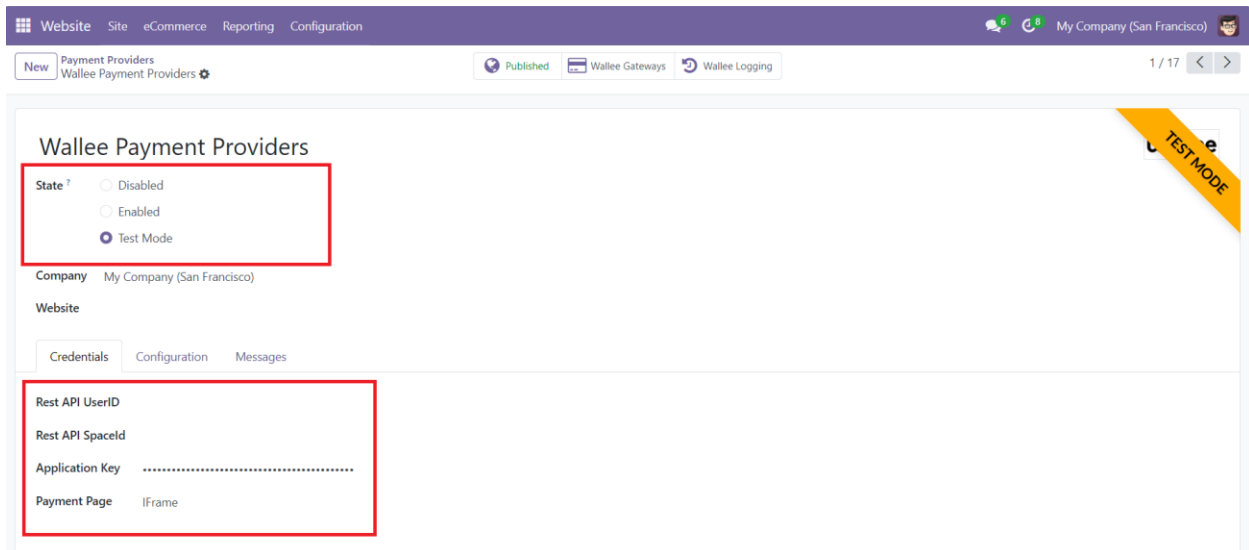


*Screenshot 1: Payment Providers Listed in Odoo Backend*

After selecting the **Wallee Payment Provider** from the list of available payment providers, proceed to the **Credentials** tab. This section allows you to configure your Wallee account by entering the necessary credentials associated with your Wallee Payment Provider space.

- **Enter Your Credentials:**
  - Provide the required Space ID, User ID, and API Key to establish a secure connection with your Wallee account.
  - Ensure that the credentials entered are accurate to avoid connection errors.

- Select the Payment Page Type:
  - Choose your preferred payment page type to define how the payment interface is displayed to customers:
  - I-Frame and Lightbox are the available options.



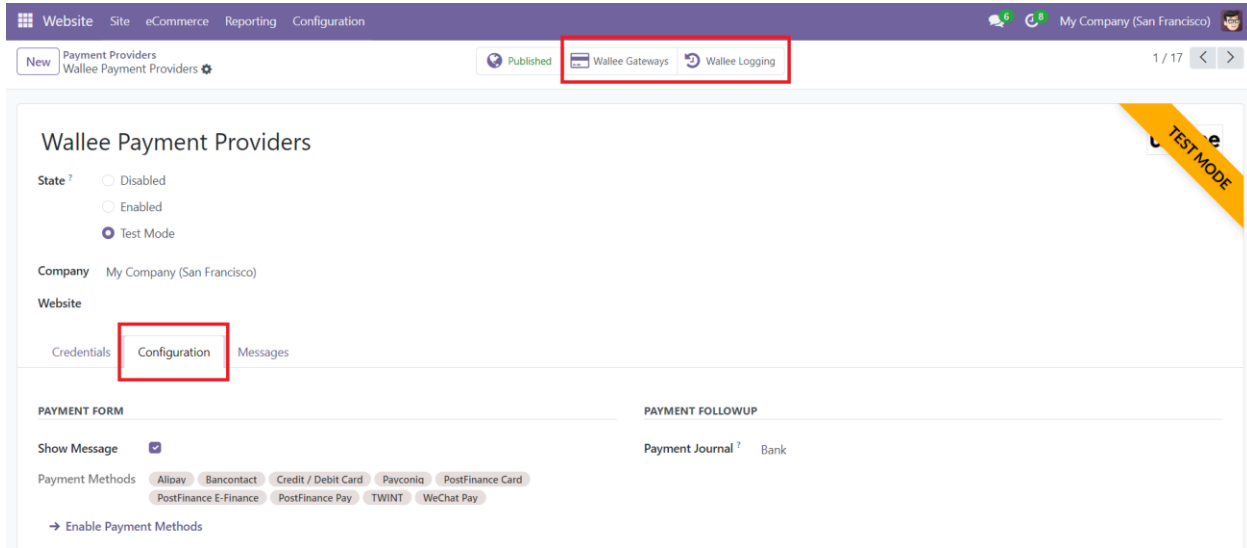
*Screenshot 2: Odoo Backend Configuration of Wallee Credentials*

To configure the Wallee Payment Provider in Odoo, you will need the following details from Wallee:

1. **Rest API UserID:** The Application User ID created in app.wallee.com.
2. **Rest API SpaceID:** The Space ID obtained from app.wallee.com.
3. **Application Key:** The Application Key generated in app.wallee.com.

After entering these details, you can set the status to '**Enabled**' for live transactions or '**Test Mode**' for testing purposes.

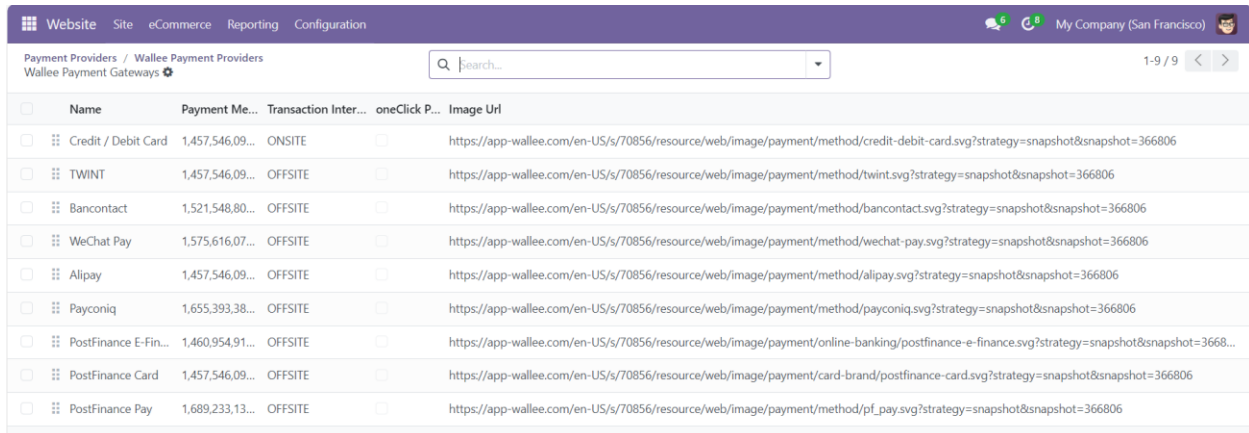
Additionally, you can customize the payment form and payment follow-up settings within the **Configuration** tab to tailor the payment experience to your needs.



*Screenshot 3: Odoo Backend Configuration*

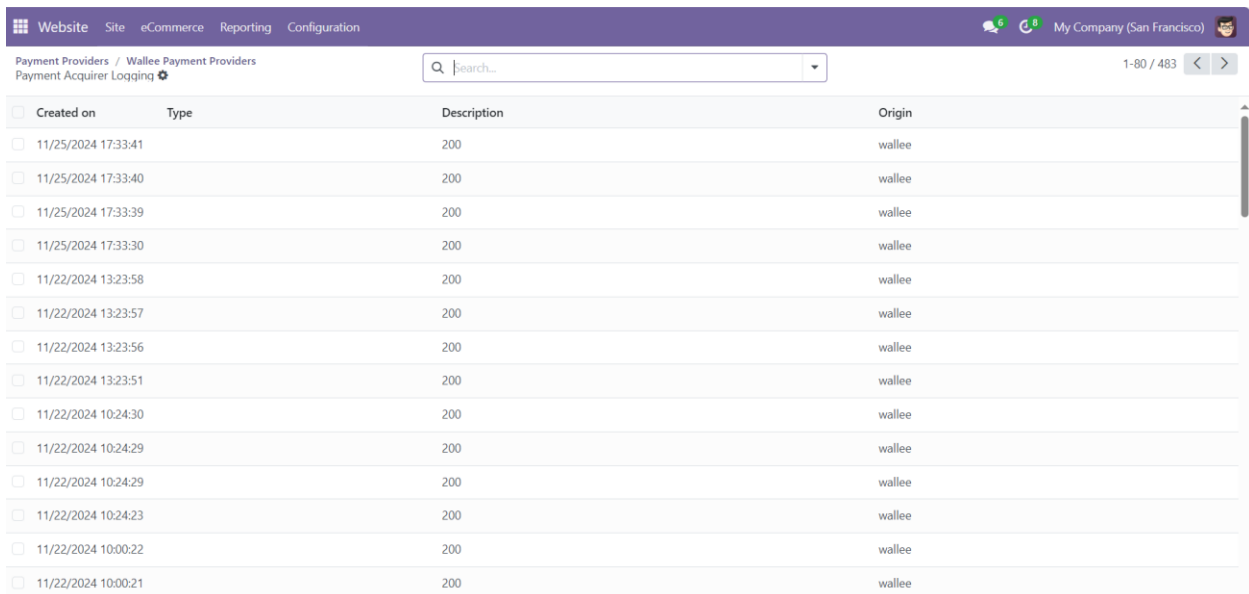
After successful configuration, you can view the payment methods and logs related to the Wallee Payment Provider as follows:

- **Payment Methods:** Click on the 'Wallee Gateways' button to view and manage the available payment methods.
- **Logs:** Click on the 'Wallee Logging' button to access and review logs related to the Wallee payment provider.



<input type="checkbox"/>	Name	Payment Me...	Transaction Inter...	oneClick P...	Image Url
<input type="checkbox"/>	Credit / Debit Card	1,457,546,09...	ONSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/credit-debit-card.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	TWINT	1,457,546,09...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/twint.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	Bancontact	1,521,548,80...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/bancontact.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	WeChat Pay	1,575,616,07...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/wechat-pay.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	Alipay	1,457,546,09...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/alipay.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	Payconiq	1,655,393,38...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/payconiq.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	PostFinance E-Fin...	1,460,954,91...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/online-banking/postfinance-e-finance.svg?strategy=snapshot&snapshot=3668...
<input type="checkbox"/>	PostFinance Card	1,457,546,09...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/card-brand/postfinance-card.svg?strategy=snapshot&snapshot=366806
<input type="checkbox"/>	PostFinance Pay	1,689,233,13...	OFFSITE	<input type="checkbox"/>	https://app-wallee.com/en-US/s/70856/resource/web/image/payment/method/pf_pay.svg?strategy=snapshot&snapshot=366806

Screenshot 4: Wallee Payment Methods



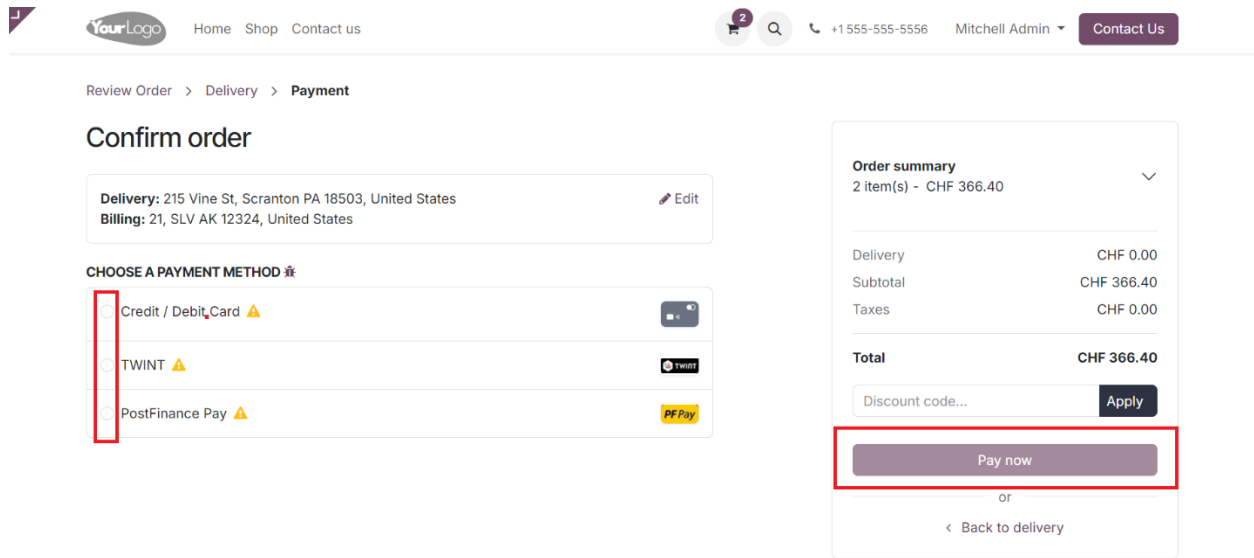
<input type="checkbox"/>	Created on	Type	Description	Origin
<input type="checkbox"/>	11/25/2024 17:33:41		200	wallee
<input type="checkbox"/>	11/25/2024 17:33:40		200	wallee
<input type="checkbox"/>	11/25/2024 17:33:39		200	wallee
<input type="checkbox"/>	11/25/2024 17:33:30		200	wallee
<input type="checkbox"/>	11/22/2024 13:23:58		200	wallee
<input type="checkbox"/>	11/22/2024 13:23:57		200	wallee
<input type="checkbox"/>	11/22/2024 13:23:56		200	wallee
<input type="checkbox"/>	11/22/2024 13:23:51		200	wallee
<input type="checkbox"/>	11/22/2024 10:24:30		200	wallee
<input type="checkbox"/>	11/22/2024 10:24:29		200	wallee
<input type="checkbox"/>	11/22/2024 10:24:29		200	wallee
<input type="checkbox"/>	11/22/2024 10:24:23		200	wallee
<input type="checkbox"/>	11/22/2024 10:00:22		200	wallee
<input type="checkbox"/>	11/22/2024 10:00:21		200	wallee

Screenshot 5: Wallee Payment Provider Logs

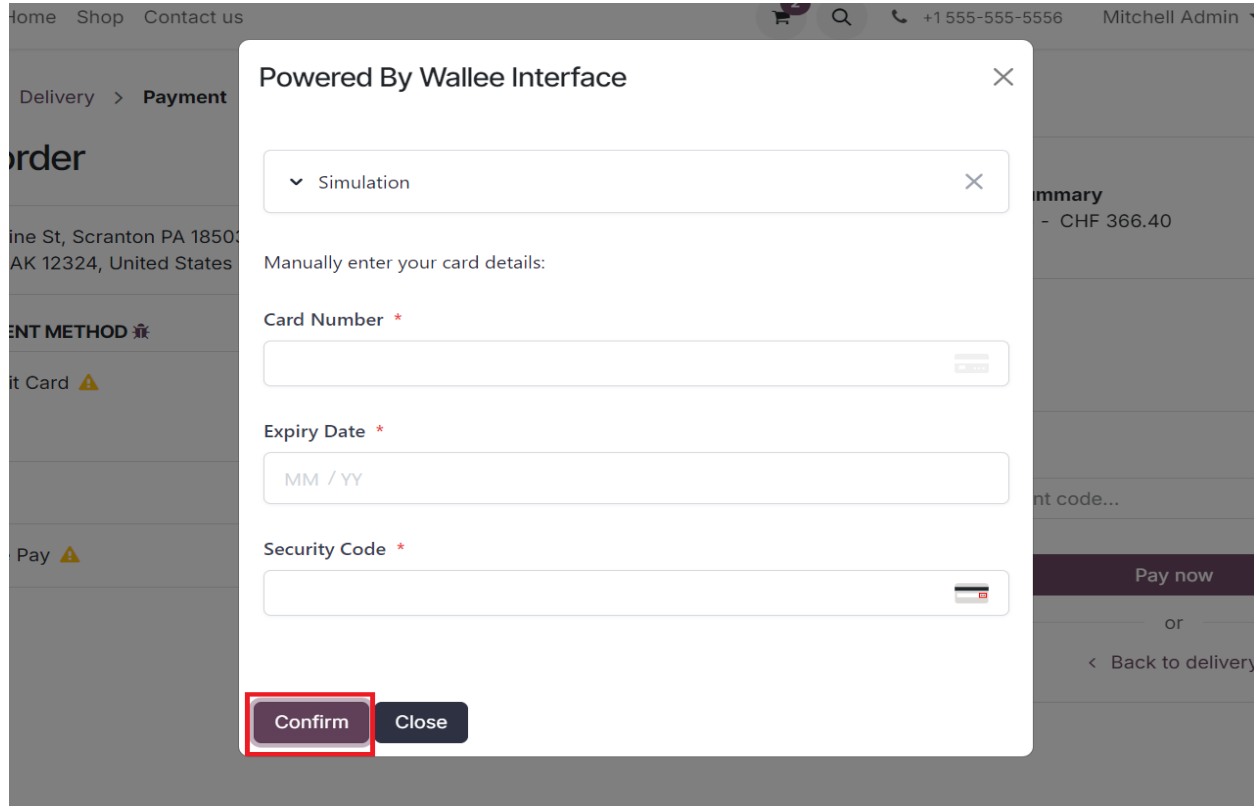
### 3.2 Payment Processing from Website

Choose your preferred payment method from those listed on the payment screen based on your currency. Then, click the **'Pay Now'** button on the Odoo eCommerce payment screen to proceed to the Wallee payment interface and complete your payment.





Screenshot 6: Multiple Payment Methods Listed in the Payment Screen



Screenshot 7: Wallee Payment Interface – I-Frame

**PITS**

CHF366.40

▼ Simulation



You can use the test information to simulate payments.

Manually enter your card details:

Card Number \*

Expiry Date \*

Security Code \*

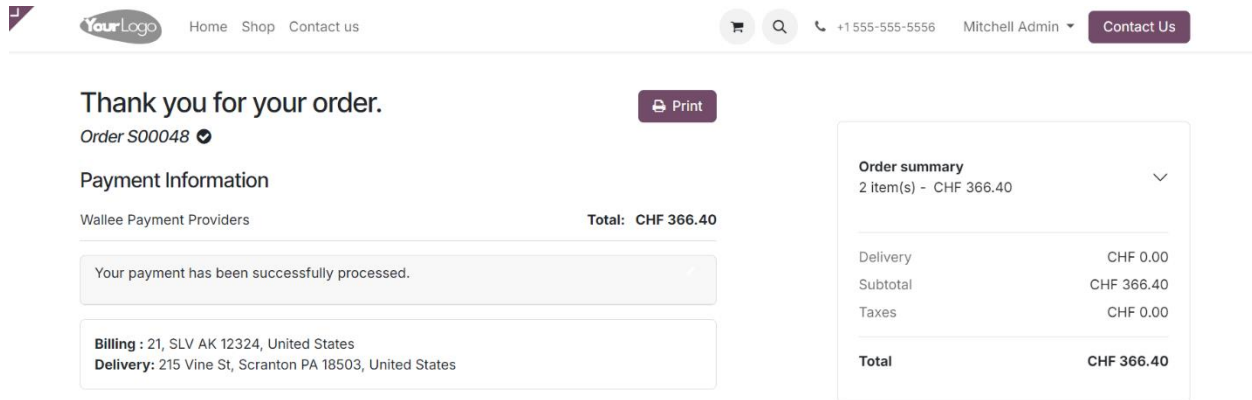
**Pay**

Cancel Payment

easy pay any way with **wallee***Screenshot 8: Wallee Payment Interface – Lightbox*

To proceed with your payment, enter your card details in the designated fields and click the 'Confirm'/'Pay' button. Upon successful submission, you will be redirected to the **Payment Status** page on the Odoo eCommerce website, where you can review the outcome of your transaction.

### 3.3 Order Status

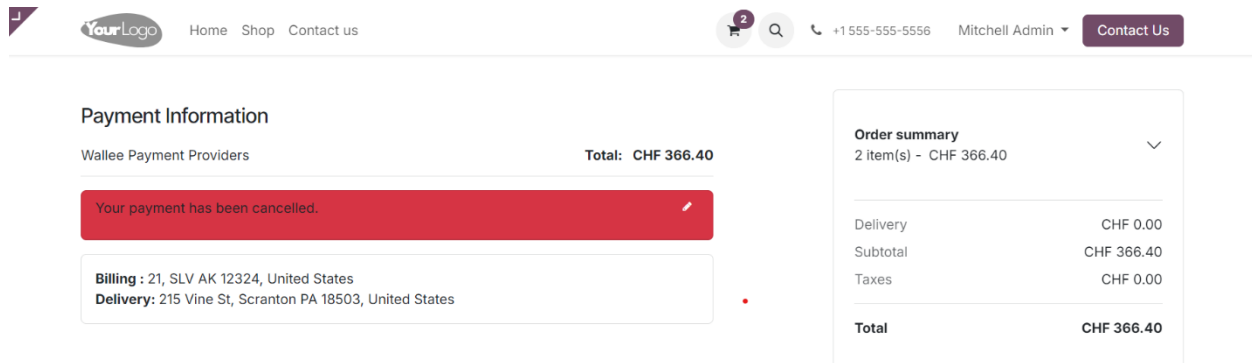


The screenshot shows an order confirmation page. At the top, there is a navigation bar with a logo, 'Home Shop Contact us', a shopping cart icon with '2' items, a search icon, a phone icon with '+1 555-555-5556', a user dropdown 'Mitchell Admin', and a 'Contact Us' button. The main content area features a 'Thank you for your order.' message with a 'Print' button and the order ID 'Order S00048'. Below this is the 'Payment Information' section, which states 'Wallee Payment Providers' and 'Total: CHF 366.40'. A green message box indicates 'Your payment has been successfully processed.' To the right is an 'Order summary' table:

Order summary	
2 item(s) - CHF 366.40	
Delivery	CHF 0.00
Subtotal	CHF 366.40
Taxes	CHF 0.00
<b>Total</b>	<b>CHF 366.40</b>

At the bottom, billing and delivery addresses are listed: 'Billing : 21, SLV AK 12324, United States' and 'Delivery: 215 Vine St, Scranton PA 18503, United States'.

Screenshot 9: Order Confirmation



The screenshot shows an order cancelled page. The navigation bar is identical to the previous screenshot. The main content area features a 'Payment Information' section with 'Wallee Payment Providers' and 'Total: CHF 366.40'. A red message box indicates 'Your payment has been cancelled.' To the right is an 'Order summary' table:

Order summary	
2 item(s) - CHF 366.40	
Delivery	CHF 0.00
Subtotal	CHF 366.40
Taxes	CHF 0.00
<b>Total</b>	<b>CHF 366.40</b>

At the bottom, billing and delivery addresses are listed: 'Billing : 21, SLV AK 12324, United States' and 'Delivery: 215 Vine St, Scranton PA 18503, United States'.

Screenshot 10: Order Cancelled

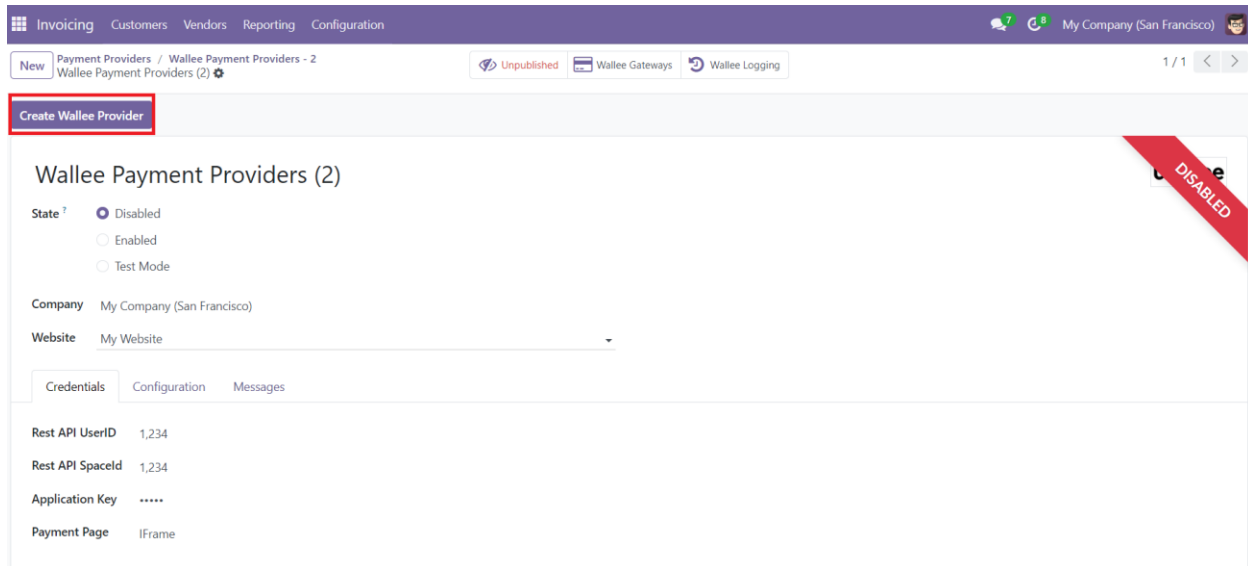
### 3.4 Wallee Multi-Website for Multi-Space Backend Configuration

To configure Wallee payment providers for multiple websites, you must create a separate payment provider for each website.

Follow these steps to set up individual payment providers:

1. Click the **“Create Wallee Provider”** button.
2. For each website, configure a distinct Wallee payment provider by filling in the required details.

By creating separate providers, you can ensure each website has its own tailored payment processing settings.



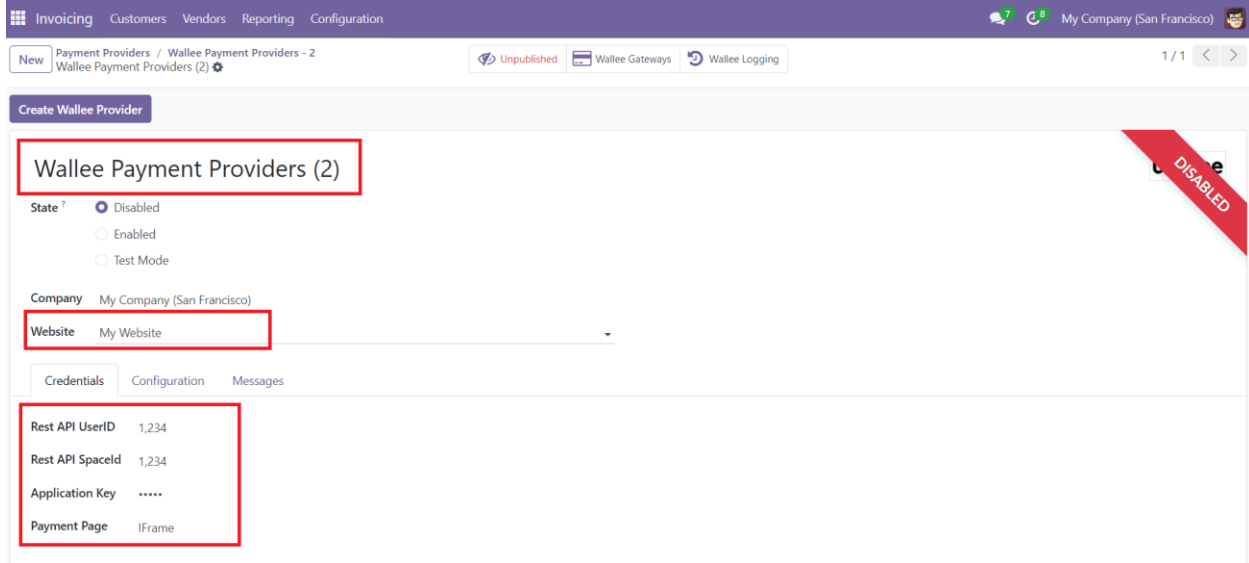
*Screenshot 11: Creating new Wallee Provider*

Clicking the “**Create Wallee Provider**” button will generate a new Wallee provider in Odoo with a unique name.

After creating the provider, follow these steps to complete the configuration:

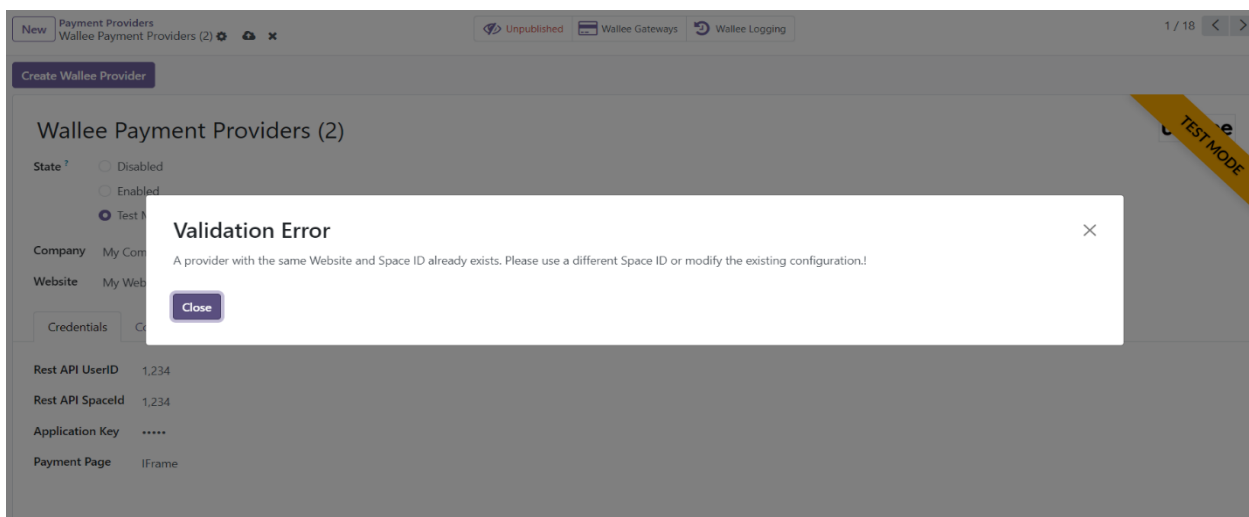
1. **Associate the Provider with a Website:** Select the desired website to link this Wallee provider.
2. **Input Credentials:** Enter the credentials for the Wallee space that has not yet been configured in Odoo. Ensure the information is accurate to establish a successful connection.

By completing these steps, you can seamlessly integrate Wallee payment processing for your specific website.



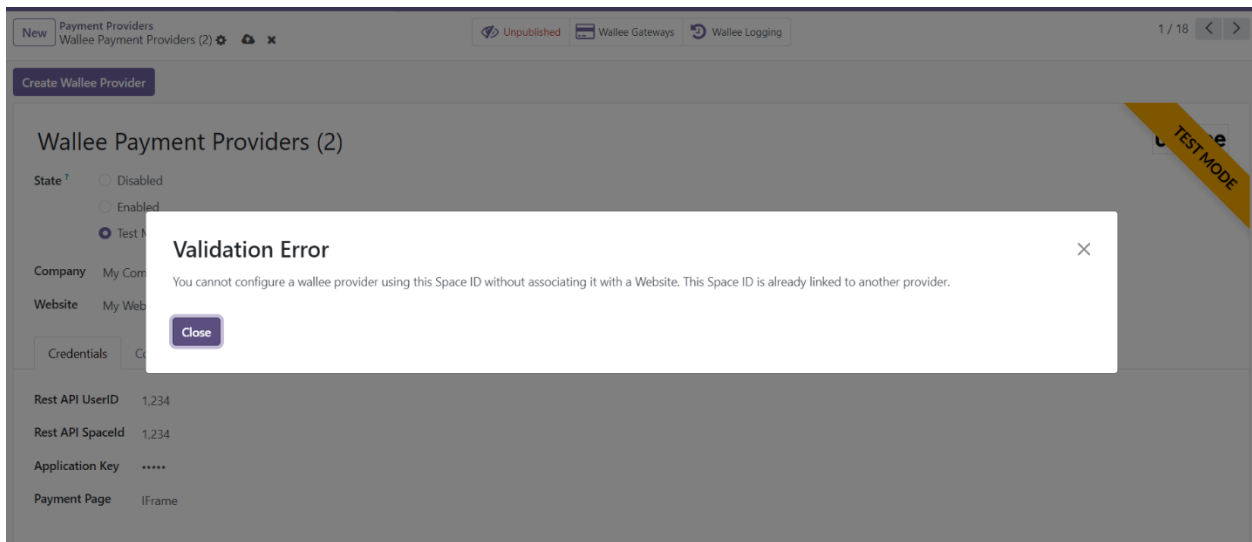
Screenshot 12: Mapping Website to Wallee Provider

- The application will raise a warning if the user attempts to configure a provider that meets any of the following conditions:
  - **Duplicate Website and Space ID Combination:** If a provider with the same combination of Website and Space ID is already configured, the system will raise a warning. This prevents duplication and ensures consistency across payment configurations.



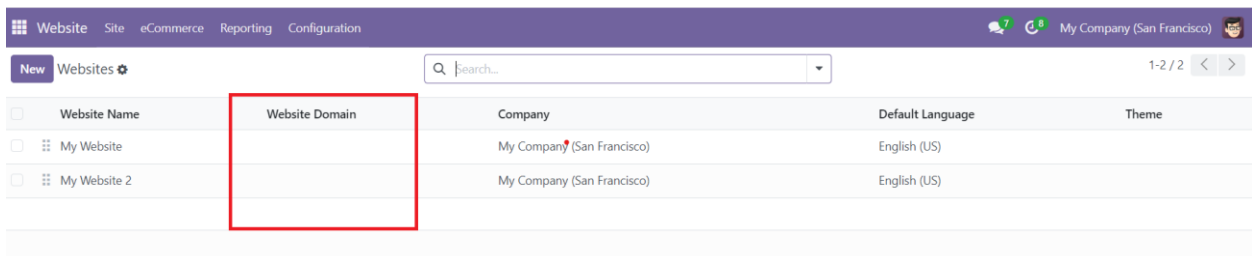
Screenshot 13: Validation message

- **Space ID Already Linked to Another Provider Without a Website:** A warning will be raised if the user attempts to configure a provider using a *Space ID* that is already linked to another provider without an associated website. This is critical because a provider configured without a website is accessible across all websites, making the new configuration redundant, as the existing provider already covers all potential payment scenarios.

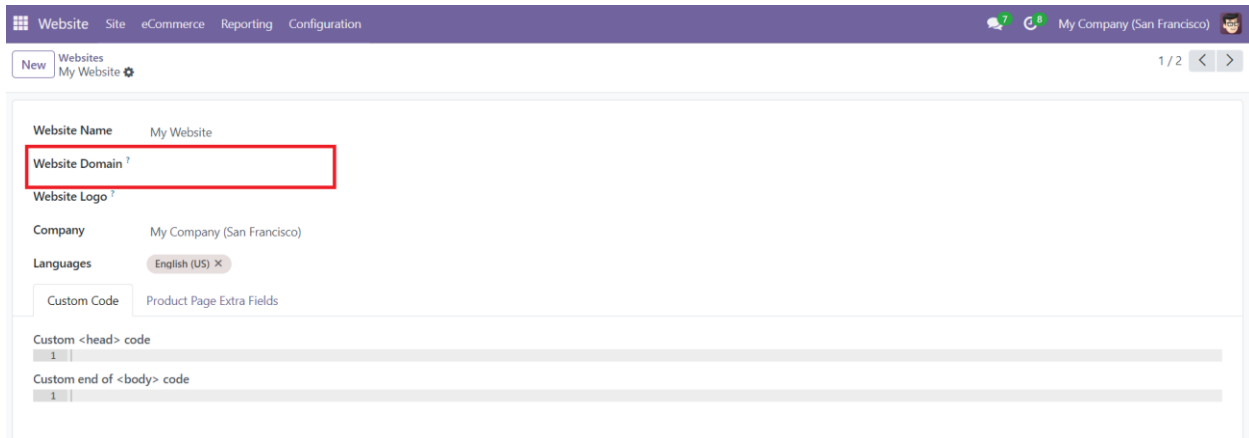


Screenshot 14: Validation message.

To enable multi-website functionality, you must configure the domain names for each website.



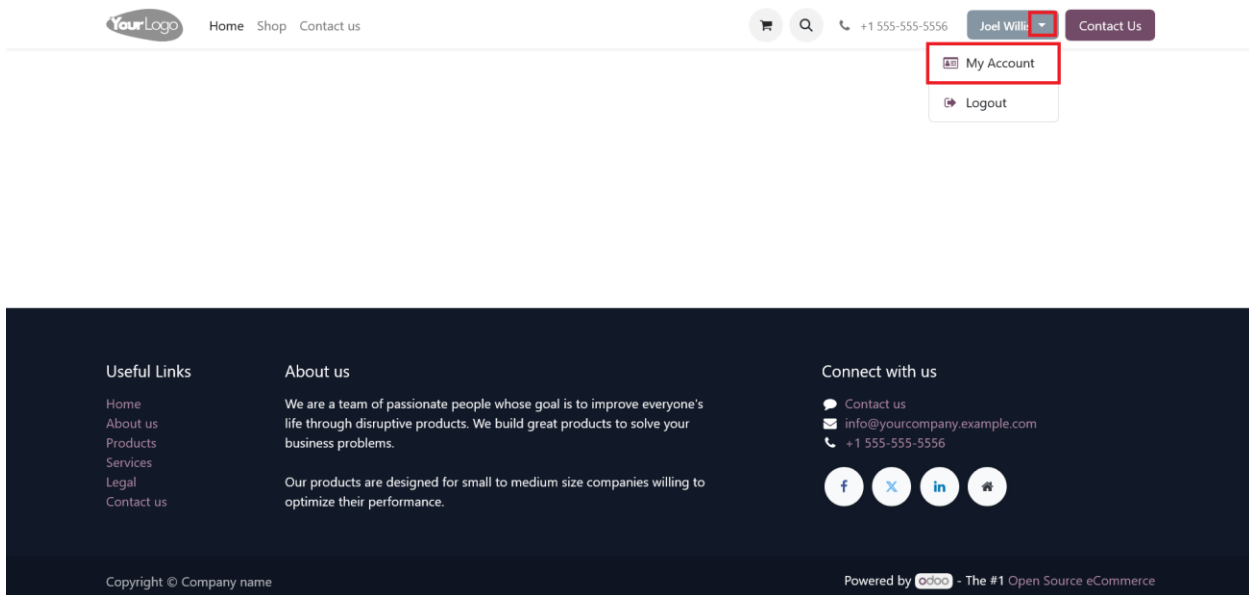
Screenshot 15: Mapping Domain to Websites.



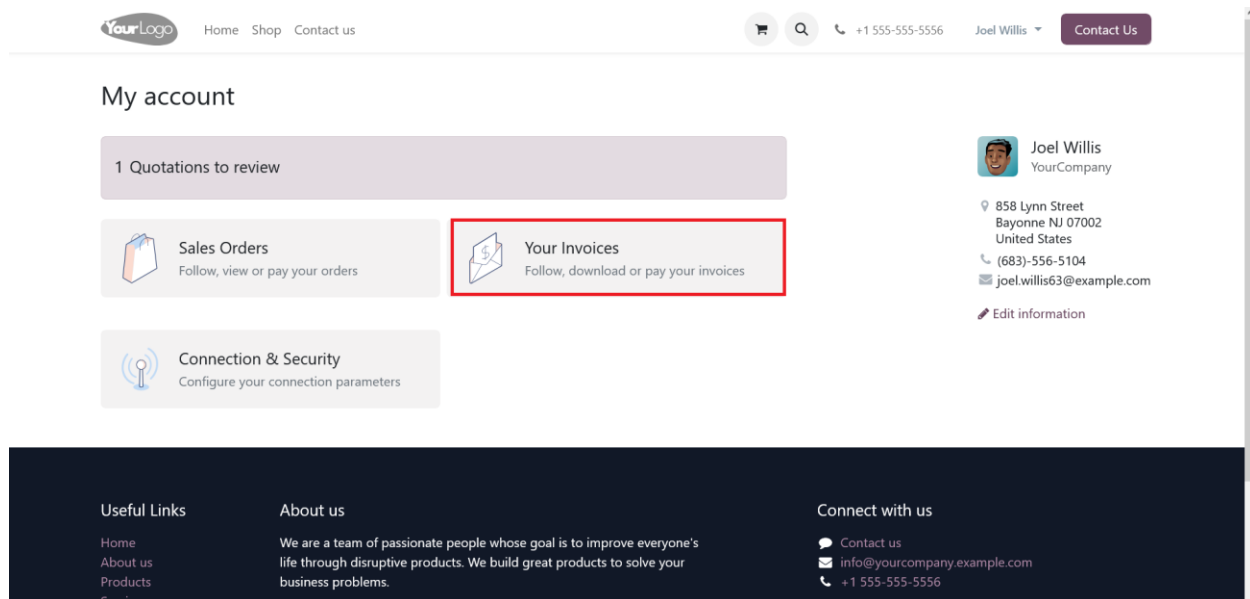
Screenshot 16: Mapping Website Domain address

### 3.5 Invoice Payment Process

By clicking on the **My Account** menu, users can view documents such as invoices and sales orders associated with their account.



Screenshot 17: Portal User Dashboard



*Screenshot 18: Portal User Account Dashboard*

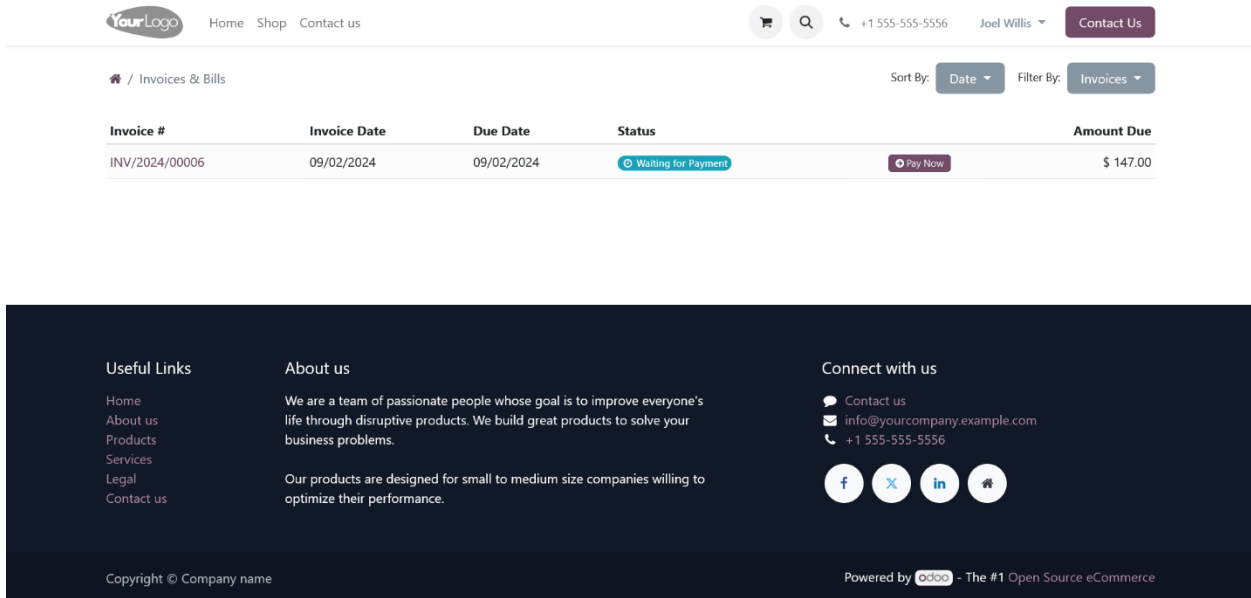
By clicking the “**Your Invoices**” menu, users can access a comprehensive list of all their invoices.

From this list, users can:

1. **Review Invoice Details:** View individual invoice records for better clarity.
2. **Proceed with Payment:** Select a specific invoice to initiate the payment process seamlessly.

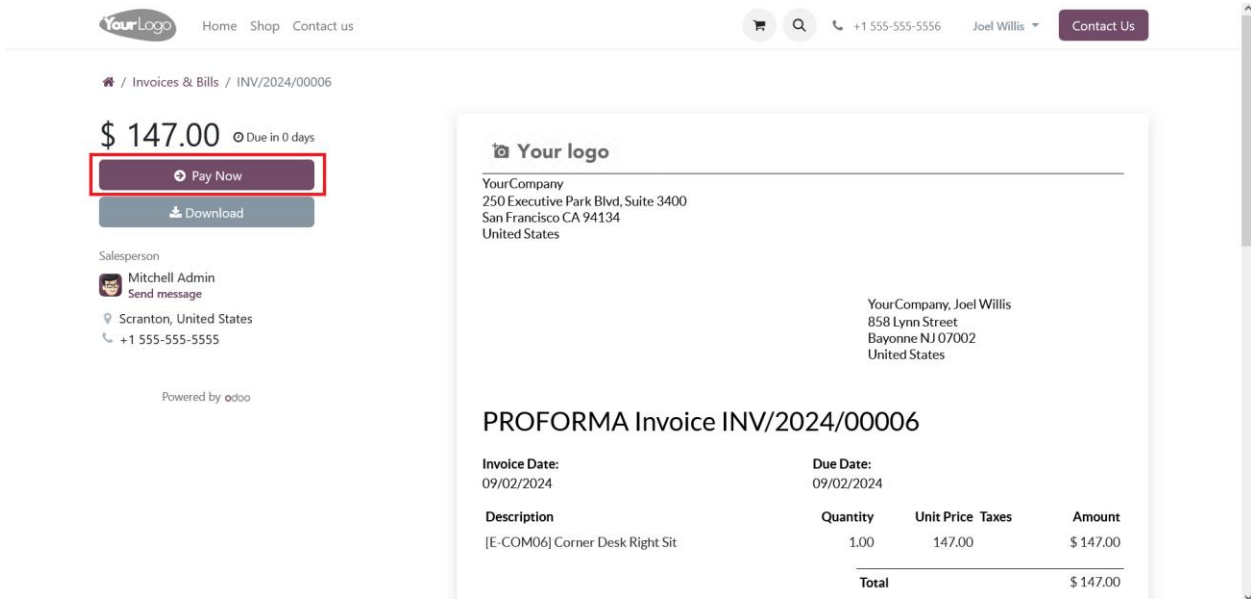
This feature provides users with an organized and efficient way to manage their invoices and complete payments





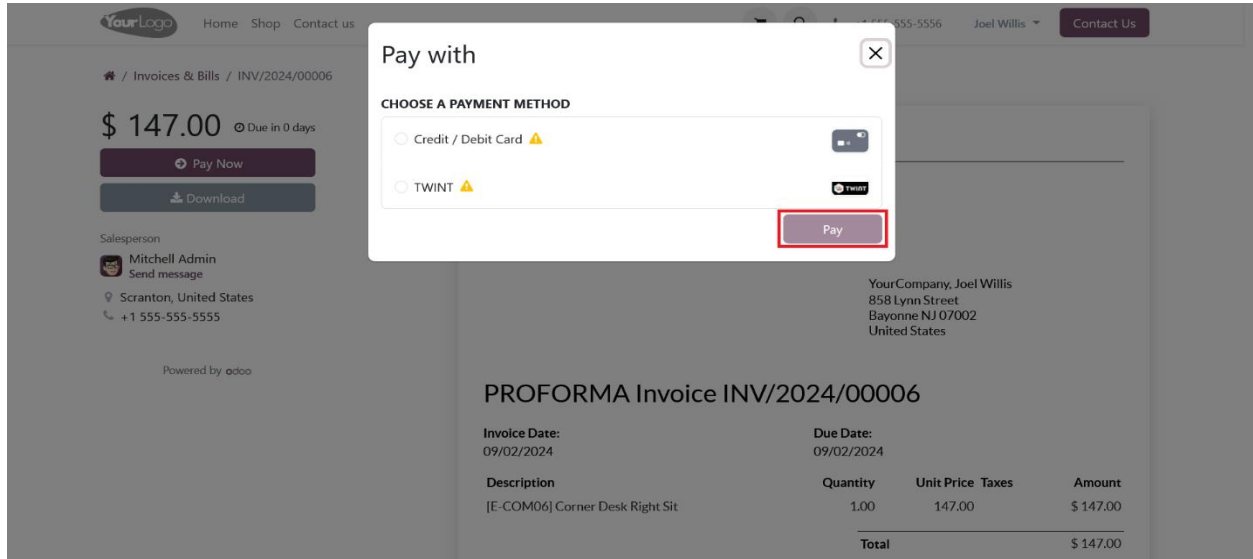
Screenshot 19: Invoices List

Click the 'Pay Now' button to proceed with the payment.



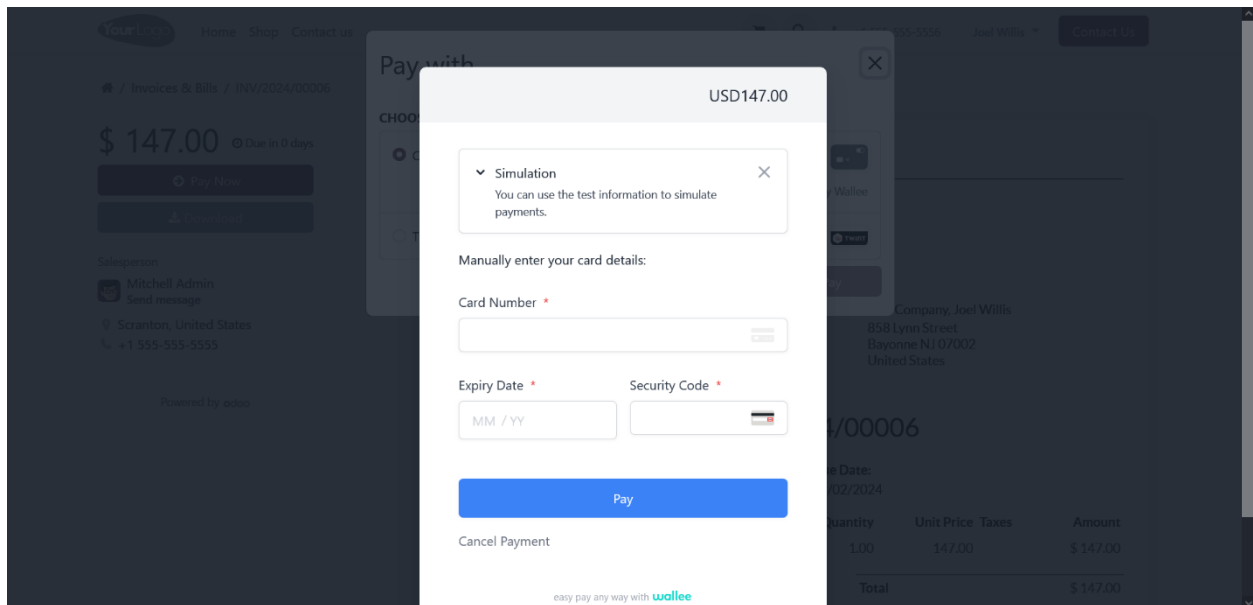
Screenshot 20: Invoices Payment Process

To proceed with the payment, choose the payment option that best suits your needs and click the **'Pay' Button**. This action will redirect you to the Wallee provider interface, where you can securely complete the payment process.



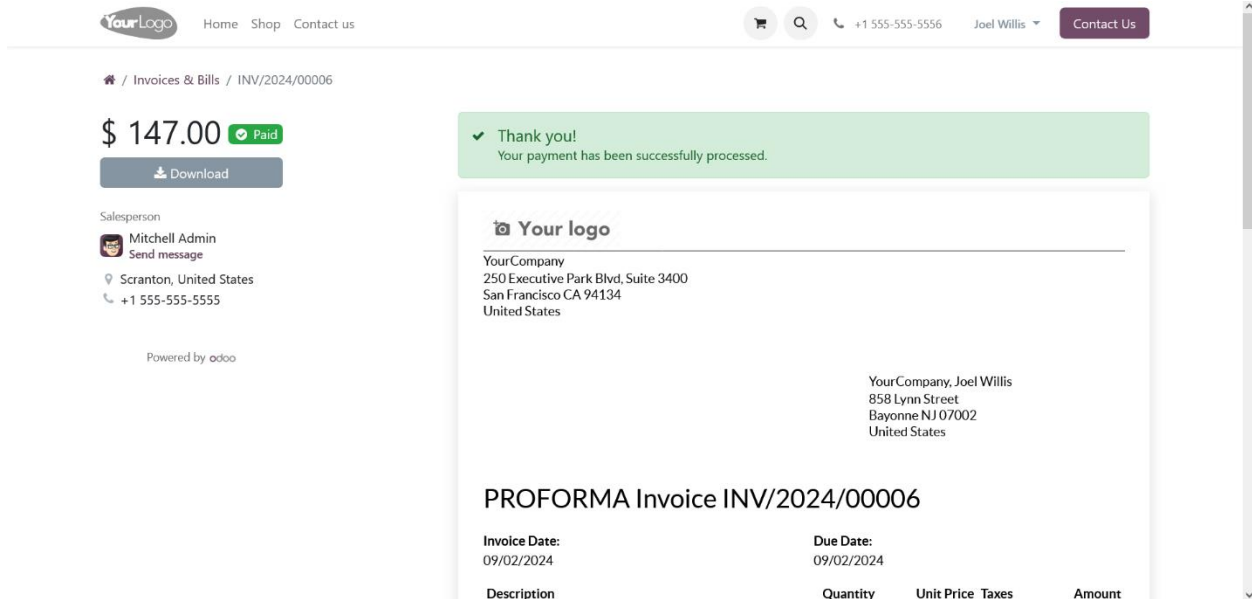
Screenshot 21: List of available Payment Methods

Based on the Wallee provider's payment page configuration, users will see either the Wallee I-Frame or Lightbox payment interface.

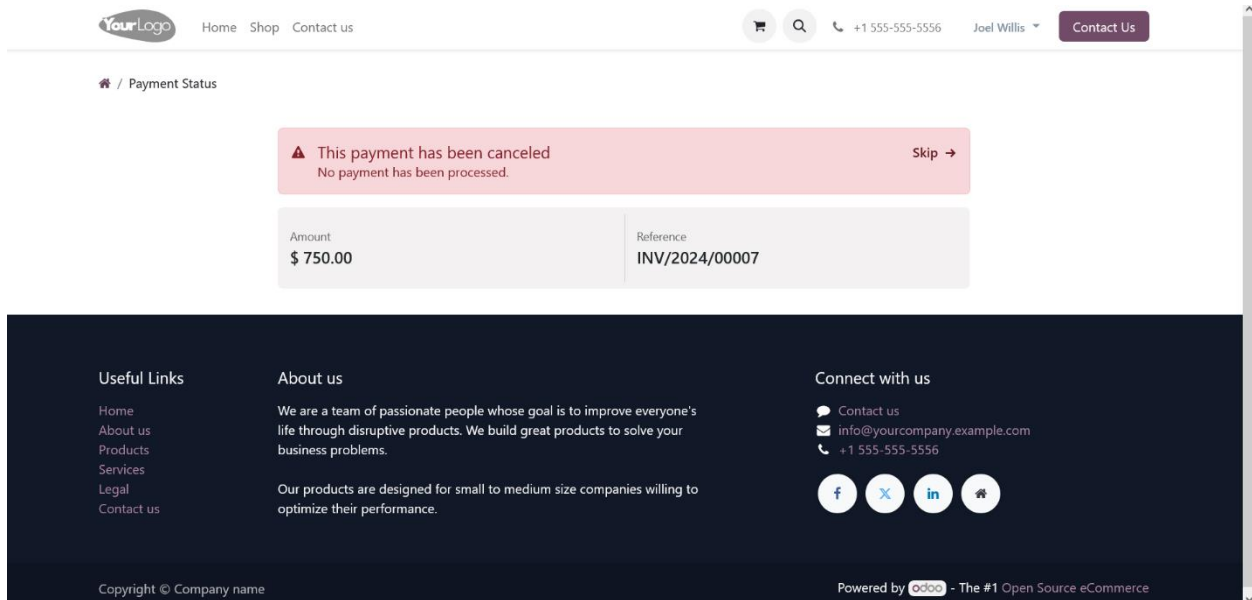


Screenshot 22: Wallee Payment Interface

After completing the payment successfully, users will receive a confirmation message displayed on the screen. This message serves as verification that the transaction has been processed securely and successfully.

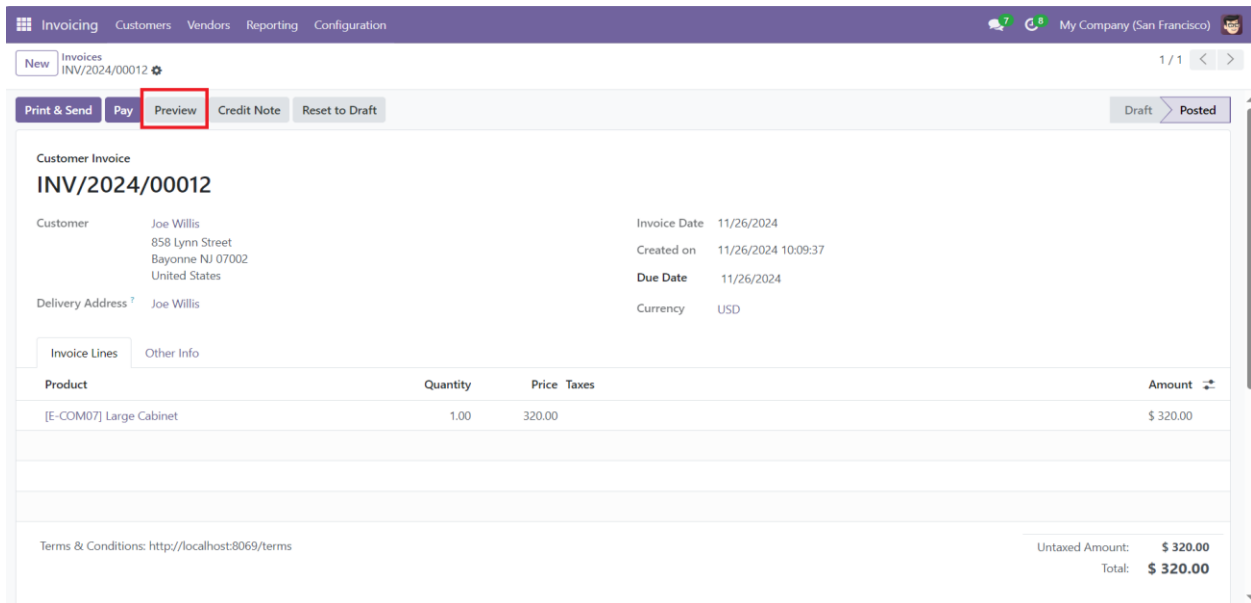


Screenshot 23: Payment Success Page

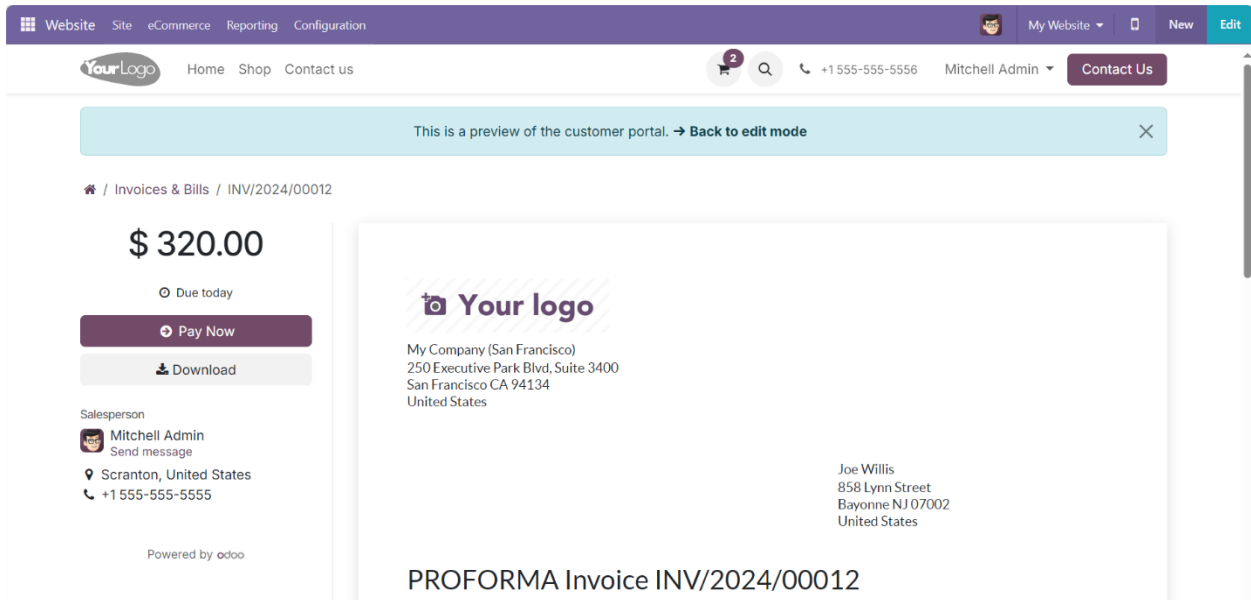


Screenshot 24: Payment Failed/Cancelled Page

After generating and confirming an invoice in the Odoo backend, a **'Preview'** button will become visible. Click the **'Preview'** button to be redirected to the portal page associated with the invoice. On the portal page, locate the **'Pay Now'** button. Clicking this button will open the payment interface, allowing you to securely complete the transaction as previously described.



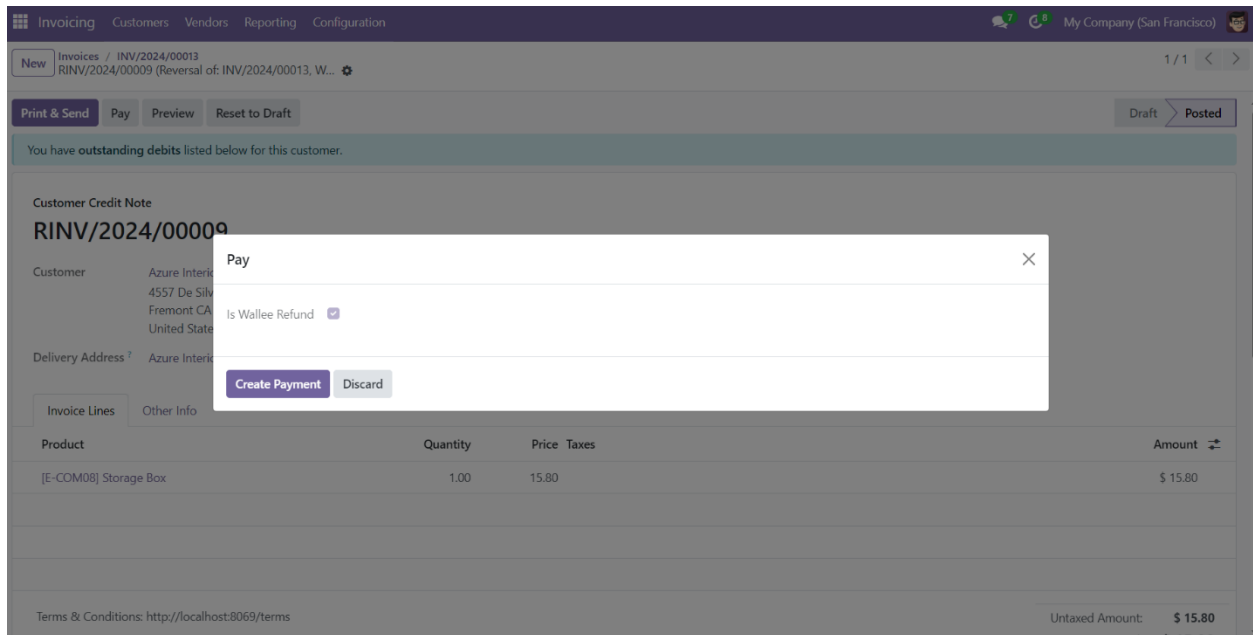
Screenshot 25: Invoice Payment Process from Odoo Backend



Screenshot 26: Invoice Payment Process Portal Page

## ➤ Processing Refund

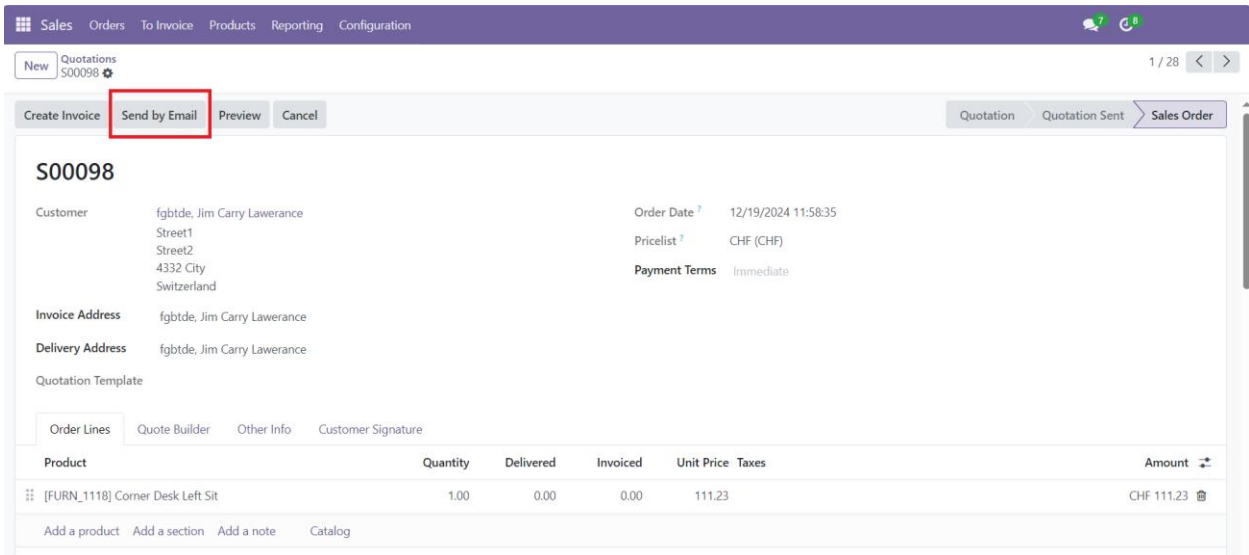
- To initiate a refund, generate a credit note corresponding to the original invoice amount by navigating to the invoice and clicking on Credit Note button.
- Once the credit note is created, confirm it by clicking the **Confirm** button. This action will validate the credit note and prepare it for the refund process.
- Once the credit note is confirmed, click the **Pay** button to proceed with the refund payment. If the original invoice was paid using the Wallee payment provider, the refund amount cannot be adjusted and must match the original amount.
- A transaction for the specified refund amount will be created and can be viewed in the Wallee back office



Screenshot 27: Processing Refund

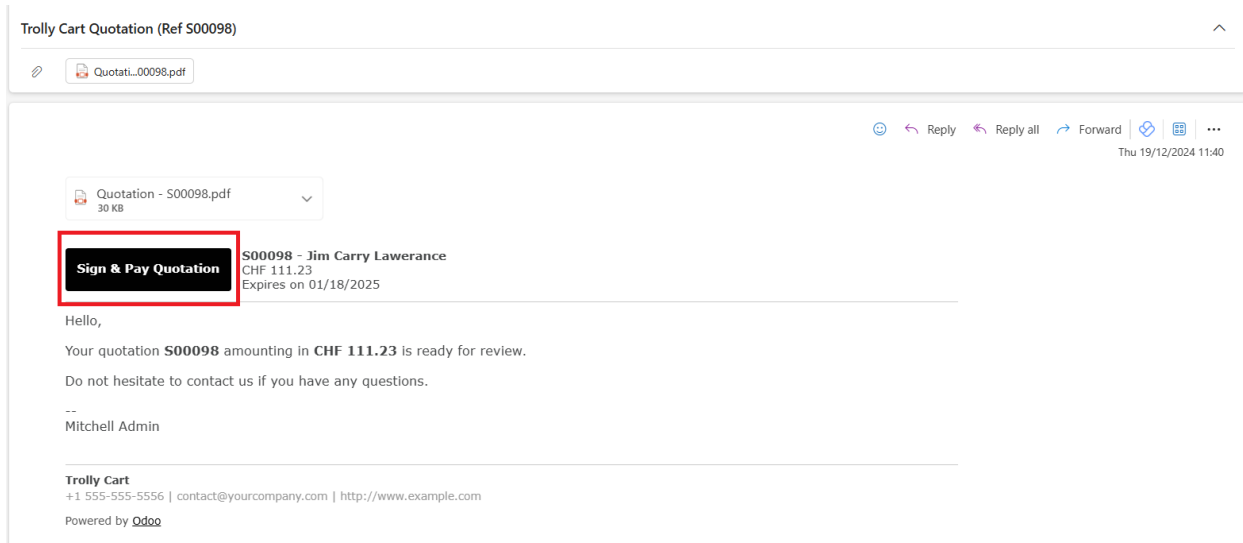
### 3.6 Sales Payment Process

To create a new Sale Order, navigate to the Sales menu and select the customer. Add the relevant products to the Sale Order Lines. Once the customer and product details are included, send the Sale Order via email by clicking the "Send by Email" button.



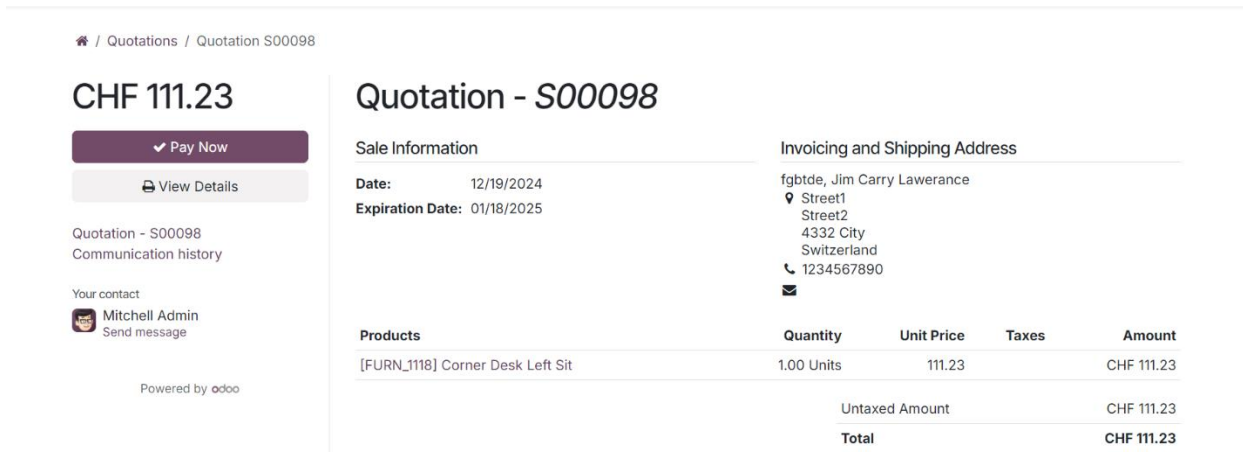
*Screenshot 28: Sale Order creation and sending via email*

This action will trigger a pop-up window, allowing the user to make any necessary changes to the email template. Once the email is sent, the customer can access the Sale Order details by clicking on the link provided in the email.



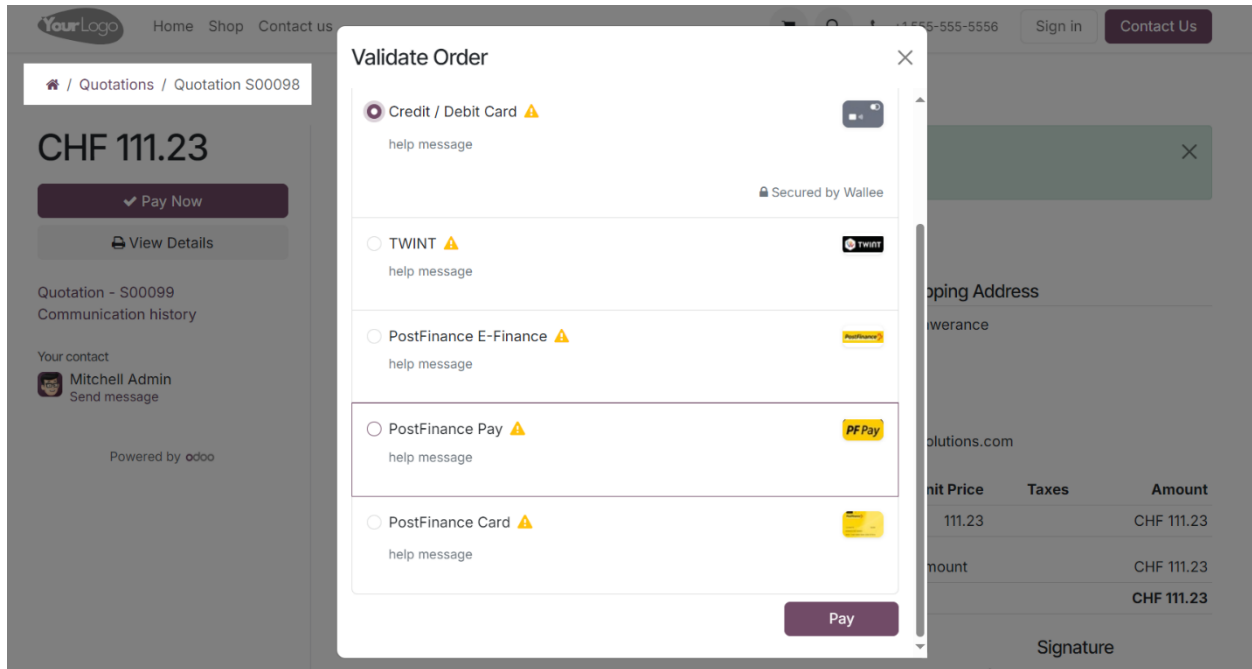
Screenshot 29: Customer accessing the Sale Order from the link provided in the mail

Clicking on this link will redirect the client to the Sale Order details page, where they can find the button to complete the payment.



Screenshot 30: Sale Oder Details Page

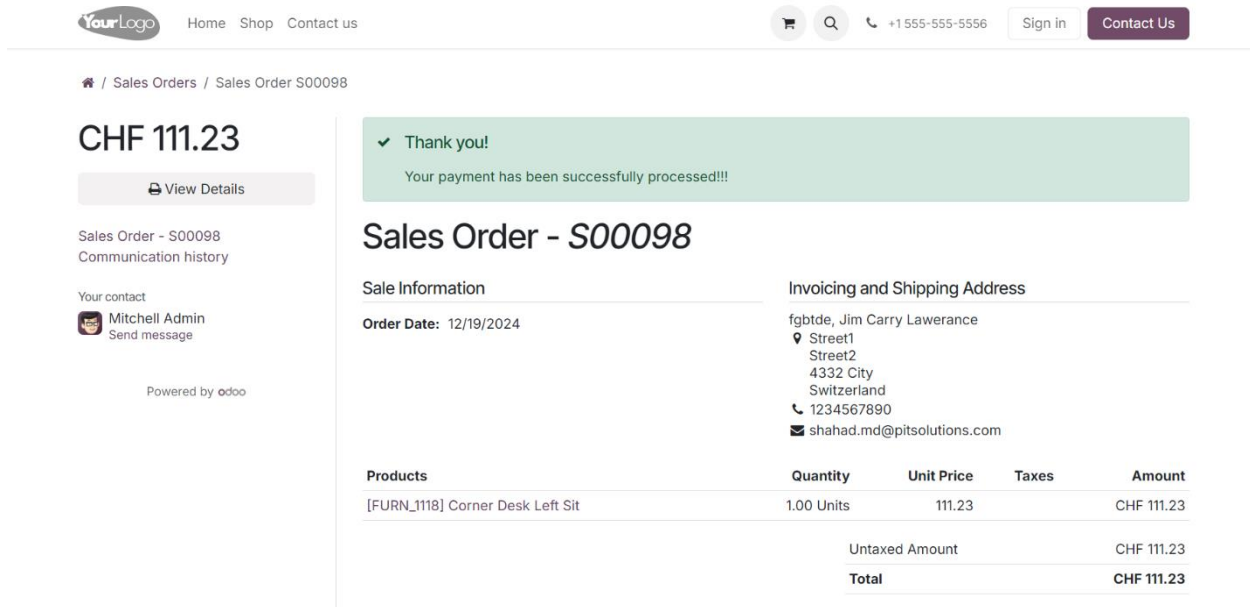
By clicking on “Pay Now” button, the client will be presented with a list of available payment methods. They can review these options and select the one that best suits their needs. Once the appropriate payment method is chosen, the client can proceed to complete the payment process.



*Screenshot 31: Listing available payment methods*

After the client completes the payment, the page will automatically redirect to the Payment Status page. This page will display the outcome of the transaction, indicating either a successful payment or a failure. In the case of a successful payment, the client will see a confirmation message along with the transaction details. If the payment fails, the client will be informed of the failure.






Home Shop Contact us +1 555-555-5556 Sign in Contact Us

Home / Sales Orders / Sales Order S00098

## CHF 111.23

[View Details](#)

Sales Order - S00098  
Communication history

Your contact  
 Mitchell Admin  
[Send message](#)

Powered by odoo

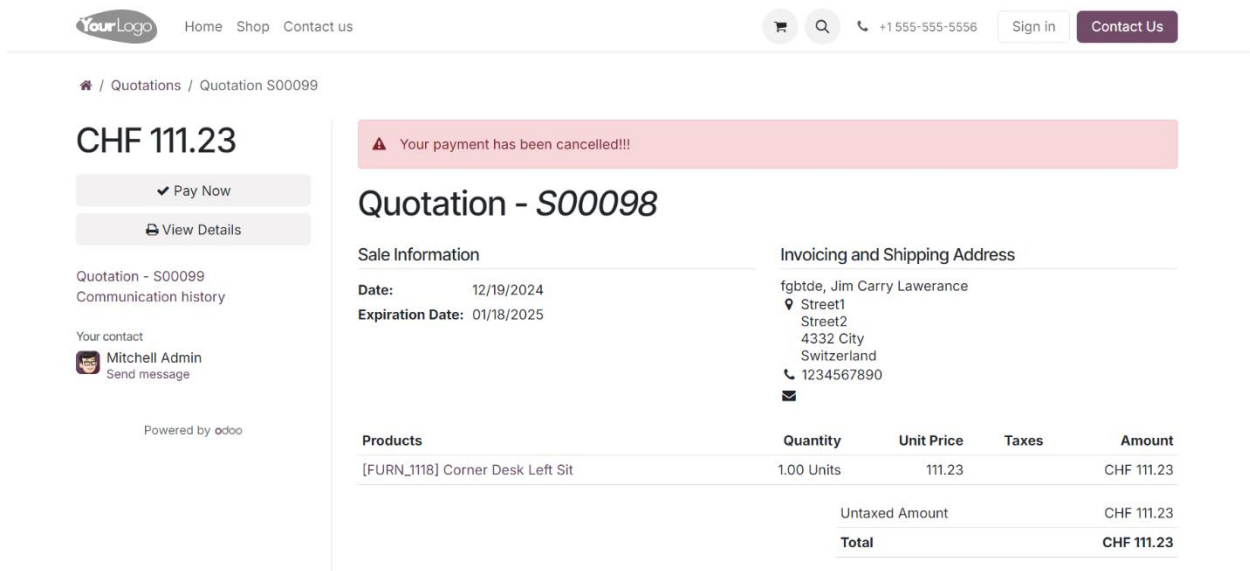
✓ **Thank you!**  
Your payment has been successfully processed!!!

### Sales Order - S00098

Sale Information		Invoicing and Shipping Address		
<b>Order Date:</b>	12/19/2024	fgbtde, Jim Carry Lawerance		
		Street1 Street2 4332 City Switzerland 1234567890 shahad.md@pitsolutions.com		

Products	Quantity	Unit Price	Taxes	Amount
[FURN_1118] Corner Desk Left Sit	1.00 Units	111.23		CHF 111.23
			Untaxed Amount	CHF 111.23
			<b>Total</b>	<b>CHF 111.23</b>

Screenshot 32: Payment Success Page



Home Shop Contact us +1 555-555-5556 Sign in Contact Us


Home / Quotations / Quotation S00099

## CHF 111.23

[Pay Now](#)

[View Details](#)

Quotation - S00099  
Communication history

Your contact  
 Mitchell Admin  
[Send message](#)

Powered by odoo

⚠ **Your payment has been cancelled!!!**

### Quotation - S00098

Sale Information		Invoicing and Shipping Address		
<b>Date:</b>	12/19/2024	fgbtde, Jim Carry Lawerance		
<b>Expiration Date:</b>	01/18/2025	Street1 Street2 4332 City Switzerland 1234567890		

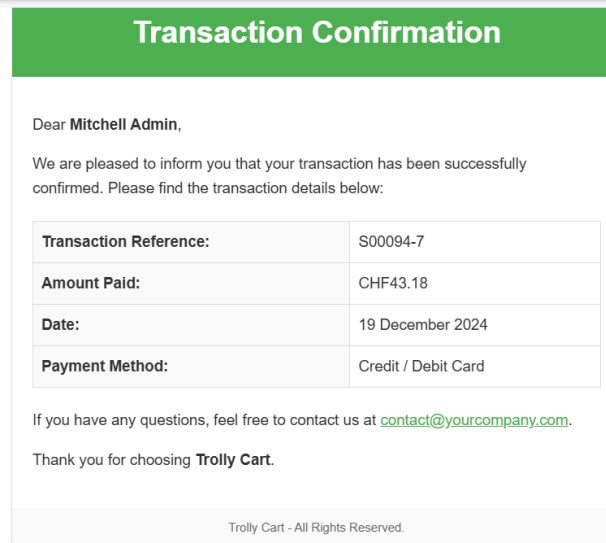
Products	Quantity	Unit Price	Taxes	Amount
[FURN_1118] Corner Desk Left Sit	1.00 Units	111.23		CHF 111.23
			Untaxed Amount	CHF 111.23
			<b>Total</b>	<b>CHF 111.23</b>

Screenshot 33: Payment Failure/Cancel Page

### 3.7 Payment Confirmation and Cancellation Emails

The payment provider plugin sends an email to customers automatically when a payment is confirmed or cancelled, detailing the transaction status, including the payment amount and reference details. This ensures that customers are promptly informed of any updates related to their transactions.

Confirmed: Payment Transaction - Ref: S00094-7



**Transaction Confirmation**

Dear **Mitchell Admin**,

We are pleased to inform you that your transaction has been successfully confirmed. Please find the transaction details below:

<b>Transaction Reference:</b>	S00094-7
<b>Amount Paid:</b>	CHF43.18
<b>Date:</b>	19 December 2024
<b>Payment Method:</b>	Credit / Debit Card

If you have any questions, feel free to contact us at [contact@yourcompany.com](mailto:contact@yourcompany.com).

Thank you for choosing **Trolley Cart**.

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*Screenshot 34: Email Template for Payment Confirmation*

Cancelled: Payment Transaction - Ref.: S00094-6

**Transaction Cancelled**

Dear **Mitchell Admin**,

We regret to inform you that your transaction has been cancelled. Please find the transaction details below:

<b>Transaction Reference:</b>	S00094-6
<b>Amount Paid:</b>	CHF43.18
<b>Date:</b>	19 December 2024
<b>Payment Method:</b>	Credit / Debit Card

If you have any questions, feel free to contact us at [contact@yourcompany.com](mailto:contact@yourcompany.com).

Thank you for choosing **Trolley Cart**.

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*Screenshot 35: Email Template for Payment Cancel*

### 3.8 Scheduled Automated Actions/Cron Jobs

The plugin includes the following automated actions/cron jobs to ensure seamless integration with the payment provider:

1. **Update Payment Transaction Status:** This cron job periodically checks and updates the status of payment transactions to ensure that the latest information is reflected in your system.
2. **Update Refund Transaction Status:** Like the payment transaction status update, this cron job ensures that refund transactions are accurately tracked and updated in your system.
3. **Synchronize Payment Methods from Wallee Back Office:** This cron job synchronizes the available payment methods from the Wallee Back Office, ensuring that your system always has the most up-to-date options for users.

**Note:** Wallee Provider payment methods support only full settlement of the bill amount and do not allow partial payments. Similarly, for refunds, only full refunds of the transaction amount are supported; partial refunds are not permitted. If a bill with partial payments is being completed, Wallee payment methods will not be available as a payment option on the payment page.

#### 4. Technical Requirements / Compatible With:

- Technical Requirements: Odoo Sales, Payment and Website Module.
- Compatible with Odoo 18.0, supporting both Community and Enterprise editions.

#### 5. Changes Log / Release Notes

- Version 1.0.0: January 2025
  - Initial release

#### 6. Support

If you have questions, use our contact form at [webshopextension.com](https://webshopextension.com) or email at [support@webshopextension.com](mailto:support@webshopextension.com).