

User Manual

PostFinance Checkout Flex Payment Plugin v17.0



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1. Introduction

The **PostFinance Checkout Flex extension** from PIT Solutions serves as a connector between PostFinance Checkout Flex and the Odoo Web Shop. It provides a standardized way to accept payments through a wide variety of payment providers worldwide. The extension supports payment gateways such as **PostFinancePay**, **TWINT**, **PayPaI**, **Online Banking**, and **Credit/Debit Cards**. More information is available under **PostFinance Checkout Flex**.

This extension links Odoo Shop users to a payment hub, which has over 50 payment gateways and processors integrated. It operates using the **Rest API**, helping to reduce cart abandonment by offering customers their preferred payment gateway. It also integrates with different payment service provider APIs, lowering payment routing costs.

2. Features

- Easy to install.
- Flexible.
- User-friendly and configurable to meet specific requirements.
- Supports multiple payment methods.
- Maintains transaction records.
- I-frame integration.
- Multi-website compatibility.
- Supports payment gateways like PostFinance Pay, TWINT, PayPal, Online Banking, and Credit/Debit Cards.
- Offers payment methods for processors such as **Worldline**, **TWINT**, **PostFinance Acquiring**, and **PayPal**.

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3. Screenshots

Install the PostFinance module:

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

CATEGORIES Postfinance Checkout Files Image: Checkout Files </th <th>Apps Apps</th> <th></th> <th>🗨 15 🛛 🖉 Mitchell Adm</th>	Apps Apps		🗨 15 🛛 🖉 Mitchell Adm
CATEGORIES Postfinance Checkout Flex Poyment Acquirer: PostFinance Sales Poyment Acquirer: PostFinance Checkout Flex Implementation Services Poyment Acquirer: PostFinance Checkout Flex Implementation Accounting Immemory Poyment Acquirer: PostFinance.chr Manufacturing Activate Italian More Webite Marketing Italian More Human Resources Poductivity Italian More Point of Sale Italian More Italian More	Apps	Module postfinance × Search	c
All Payment Acquirer: PostFinance Characteria Services Accounting Accounting Interpreterio Manufacturing Exervices Website Manufacturing Manufacturing Exervices Poductivity Activities Productivity Administration Point of Sale Administration		▼ Filters 💲 Group By 🔺 Favorites	1-1/1 < > ■
Services integrated payment inte	All Payment Acquirer: PostFinance Checkout Flex Implementation	8	
Manufacturing Website Marketing Human Resources Productivly Administration Point of Sale	Services integrated payment gateways.https://checkout.postfii Accounting ACTIVATE LEARN M		
Human Resources Productivity Administration Point of Sale	Manufacturing		
Administration Point of Sale			
	Point of Sale		
Screenshot 1: PostFinance app activation			

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

Invoicing Custom	ers Vendors Re	eporting	Configuration					, 5 €	• 😼
New Upload Invoid	ces 🌣		Incoterms Banks	earch	•		1-8/8		• •
Set your company head	sany Data 's data for documents er/footer. 's start!	s	Add a Bank Account Add a Bank Account Taxes Journals Currencies Fiscal Positions Journal Groups Tax Groups	sk of your documents.	Create Invoice Create your first invoice S First invoice sent		Online Paym Enable credit & debit c supported by S Activate Str	ard payments tripe.	×
Number	Customer	Invc		Activities	Tax Excluded	Total	Total in Currency Payment	Status	*
INV/2024/00008	jim	08/2	Payment Providers Payment Methods	Ø	\$ 1,799.00	\$ 2,068.85	\$ 2,068.85 Not Paid	Posted	
INV/2024/00007	jim	08/2	Payment Tokens	0	\$ 1,799.00	\$ 2,068.85	\$ 2,068.85 Paid	Posted	
INV/2024/00006	jim	08/2	Payment Transactions	0	\$ 1,799.00	\$ 2,068.85	\$ 2,068.85 Paid	Posted	
INV/2024/00005	jim	08/2	Management Product Categories	O	\$ 15.80	\$ 18.17	\$ 18.17 Not Paid	Posted	

Screenshot 2: Payment Providers menu item



• Click on PostFinance Payment Providers.

🖩 Invoicing Customers Vendors Reporting Configuration 🔍 🍕						
Payment Providers	Q þearch	•	1-16 / 16 < >			
Rotfinance Payment Providers Test Mode Published	SEPA Direct Debit	Wire Transfer	Demo			
َ Adyen عنایت امتدا	Amazon Payment Services	Asiapay pagi Install	Authorize.net			
Buckaroo	Flutterwave	Mercado Pago	Mollie Mollie			
PayPal	Razorpay	Sips Install	Stripe			

Screenshot 3: PostFinance Payment Provider

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

ි Home		▲ ♀ ~
Account	Application Users 💿	Create application user
PAYMENT Image: Constraint of the second s	ID All V Deleted Hide V State All V Name All V	
spaces Docs Spaces	Showing results 1 - 1	20 v results per page Columns v
Livites	□ ID Name ▲	State
a Users a Application Users a Roles		

Screenshot 4: PostFinance Account Page



• Generate new key -> Copy the generated key.

ش н	ome			A O
Account	ACCOUNT	User / Application User		
P ipace	Plan	Application Users		
	🖹 Log	and the second		Edit
Docs	Organization Web App	Credentials	Generate new key	✓ Active
	FINANCE	Creation Date	State	Primary Account
	PAYMENT	Aug 28, 2024, 7:47:03 PM	✓ Active	A Restricted Acti
	Payment Contracts PostFinance ISR	Aug 19, 2024, 12:58:24 PM	✓ Active	Request Limit

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.

Invoicing Customers Vendors Reporting Configuration		💉 👶 😽
New Payment Providers PostFinance Payment Providers	Published Update Payment Methods Postfinance Gateways D Postfinance Logging	1 / 16 < >
PostFinance Payment Providers Code ? PostFinance State ? Disabled © Enabled © Test Mode		TEST HODE
Website Credentials Configuration Messages		
Rest API UserID Rest API SpaceId Application Key		

Screenshot 6: PostFinance configuration in Odoo backend

Note: The PostFinance Pay method only supports CHF and EUR as transaction currencies. Any payments attempted with other currencies will not be processed.



• Navigate to *Website > Configuration > Settings* to create and configure websites as per the requirement.

III Website Site eCommerce Reporting Configuration								
Save Discard Sett	Save Discard Settings Q Search							
General Settings of Website My Website 1 + New Website								
S Website	Website Info							
S Invoicing	Domain Homepage URL Languages → Install langu	https://www.odoo.com / English (US) × •	Website Name Favicon	My Website 1				

Screenshot 7: Website Configuration

• Select the appropriate Website in the Website column to restrict the Payment provider to that specific website. Leaving this column blank will make this provider available in all the websites.

Invoicing Customers Vendors Reporting Configuration		🤜 👶 👼
New Payment Providers PostFinance Payment Providers	Published 🗮 Update Payment Methods 🚍 Postfinance Gateways 🥑 Postfinance Logging	1/16 < >
PostFinance Payment Providers Code ? PostFinance State ? Disabled © Enabled Enabled • Test Mode • Test Mode		HS THOOLE
Website		
Credentials Configuration Messages		
Rest API UserID		
Rest API Spaceld		
Application Key		

Screenshot 8: PostFinance Update Payment Methods

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



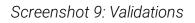
- The application will raise a warning if the user attempts to configure a provider that meets any of the following conditions:
 - Condition 1: Duplicate Website and Space ID Combination If a provider with the same combination of Website and Space ID is already configured, the system will raise a warning. This prevents duplication and ensures consistency across payment configurations.
 - Condition 2: 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.
 - Condition 3: Configuring a Provider Using a Space ID Without Linking to a Website

If the user configures a provider using a *Space ID* but does not associate it with a website, the system will issue a warning. This is because such a configuration would override all other providers using the same *Space ID*. To resolve this, the user must either disable the other configurations using the same *Space ID* or remove any existing website links from those configurations.

PostFinance Payment Providers							
State [?] Disabled Enabled • Test Mode							
Website My Website 1 Credentials Configuration Messages	Validation Error × A provider with the same Website and Space ID already exists. Please use a different Space ID or modify the existing configuration.						
Rest API UserID 111,951 Rest API SpaceId 67,533	Gose						
Application Key							



PostFinance Payment Providers		
State ? O Disabled		
 Enabled Test Mode 		
Website	Validation Error	×
Credentials Configuration Messages	You cannot configure a PostFinance provider using this Space ID without associating it with Website. This Space ID is already linked to another provider.	па
Rest API UserID 111,951	Close	
Rest API SpaceId 67,533		
Application Key		



Process Workflow

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

Confirm order		1 x Conference (Steel)	Chair \$ 33.0
Billing:	<i>∎</i> Edit		
Shipping:		Delivery	\$ 0.0
		Subtotal	\$ 33.0
Choose a delivery method		Taxes	\$ 4.9
Standard delivery	Free	Total	\$ 37.9
Pay with		Discount code	Apply
HOOSE A PAYMENT METHOD		Pay no	N
		or	
Credit / Debit Card - ONSITE 🔺		< Back to	cart
🔿 PayPal 🔺	21 M		
O PostFinance Pay 🔺	PFPay		

Screenshot 10: 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 *	
MM / YY			
Store the card details for future use.			
Confirm Close Screenshot 11: Onsite		ame for Credit/Debit Card pa דאוחד וֹ	ayment method
	39.7	73 CHF	
		1 2 3 4 5	
The TW		nent. As such please choose the result which should be simulated.	
	Simulate Succes	Simulate Failure	

Screenshot 12: Offsite payment using TWINT payment method



CourLogo Home Shop Contact us		R Q & +1 (650) 555-0111	Contact Us
Thank you for your order. Order 500102 ©	🖨 Print	1 x Conference ((Steel)	Chair \$ 33.00
Payment Information		Delivery	\$ 0.00
ostFinance Payment Providers	Total: \$ 37.95	Subtotal	\$ 33.00
		Taxes	\$ 4.95
Your payment has been successfully processed.			
		Total	\$ 37.95
Billing :			
Shipping:			

Screenshot 13: Payment success page

Гhank you for your order.	🖨 Print	1 x Conference	Chair \$ 33.00
Payment Information		(Steel)	
ostFinance Payment Providers	Total: \$ 37.95	Delivery	\$ 0.00
		Subtotal	\$ 33.00
Your payment has been cancelled.		Taxes	\$ 4.95

Screenshot 14: Payment Cancel Page



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

Payment Acquirer Logging 🔹	Q Search	•	I-80 / 1477 < >	
Created on	Туре	Description	Origin	~
08/28/2024 19:04:57		200	postfinance	
08/28/2024 18:37:21		200	postfinance	
08/28/2024 18:37:20		200	postfinance	
08/28/2024 18:37:06		200	postfinance	
08/28/2024 18:37:04		200	postfinance	
08/28/2024 18:33:47		200	postfinance	
08/28/2024 18:33:47		200	postfinance	
08/28/2024 18:33:31		200	postfinance	
08/28/2024 18:33:26		200	postfinance	
08/28/2024 18:29:12		200	postfinance	

Screenshot 15: PostFinance Log History

4. Brief description

For the smooth functioning of this plugin, a few backend configurations need to be set up. The initial step involves configuring the **PostFinance Acquirer**, where the **User ID**, **Space ID**, and **Application Key** from your PostFinance Flex account must be provided. Once this configuration is completed, activate the provider, and users can proceed with shopping. The PostFinance Flex payment methods will then appear on the shop's payment page. Customers can select their preferred **PostFinance payment method**, pay via the payment page or popup window, and then return to the Odoo Webshop.

Step-by-Step Instructions

Prerequisites: Before integrating the PostFinance payment acquirer plugin, ensure that you have a PostFinance account. You can create one at <u>https://checkout.postfinance.ch/</u> which facilitates easy verification and transaction processing.

Step 1: Set Up PostFinance Account and Configure Payment Acquirer.

• Enter your User ID, Space ID, and Application Key from your PostFinance Flex account.

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



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

Step 4: Select the PostFinance Flex payment method and click Pay Now.

Step 5: Complete the transaction by entering the necessary details on the payment page or in the popup window.

Step 6: Once the payment is successful, the order will be placed.

5. Technical Requirements / Compatible With:

• Compatible with Odoo version 17

6. Limitations

• **Cryptocurrency Payment Unavailable**: Please be aware that cryptocurrency payments powered by PostFinance are currently not supported. This limitation is due to PostFinance and is outside of our control. We recommend using alternative supported payment methods to complete your transaction.

7. Changes Log / Release Notes

Version 3.0.0: September 2024

• Added multi-website compatibility feature.

Version 2.0.1: August 2024

• Fixed I-frame loading and address mapping bugs.

Version 2.0.0: August 2024

• Introduced onsite payment methods.

Version 1.0.0: January 2024

• Initial release.



8. Support

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