

User Manual

# PostFinance Checkout Flex Payment Plugin v17.0



# Table of Contents

1.	Introduction	. 3
2.	Features	. 3
З.	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.

III Apps Apps			🗨 15 🛛 🙆 🌘 Mitchell Admin
Apps		Module postfinance * Search	Q
		▼ Filters 📚 Group By 🔺 Favorites	1-1/1 < > F 🔳
CATEGORIES All Sales Services Accounting Inventory Manufacturing Website Marketing Human Resources Productivity Administration Point of Sale	PostFinance Checkout Flex         I           Payment Acquirer: PostFinance         Checkout Flex Nore infos on integrated payment queryays.https://checkout.postFinance.chy           Activate         LEARN MORE		
	Screenshot 1: PostF	inance app activation	

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

Invoicing Custor	ners Vendors Rep	orting	Configuration					ی 🔩	.8 🐼
New Upload Invo	ices 🌣		Incoterms Banks	earch	•	•	1-8/8 <		• 0
Com Set your compan heaa Le	pany Data ys data for documents der/footer. t's start!		Add a Bank Account Accounting Taxes Journals Currencies Fiscal Positions Journal Groups Tax Groups	<b>ents Layout</b> ok of your documents. stomize	Create Invoic Create your first inv Create your first invoice	e roice. sent!	Online Paym Enable credit & debit ca supported by S Activate Stri	ents Ird payments Irripe.	×
Number	Customer	Invo	Online Payments	Activities	Tax Excluded	Total	Total in Currency Payment	Status	#
INV/2024/00008	jim	08/2	Payment Providers Payment Methods	0	\$ 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	0	\$ 15.80	\$ 18.17	\$ 18.17 Not Paid	Posted	

Screenshot 2: Payment Providers menu item



• Click on PostFinance Payment Providers.

Invoicing Customers Vendors Reporting Co	nfiguration		💐 🛃
Payment Providers	Q þearch	•	1-16 / 16 < >
RedFinance Payment Providers	SEPA Direct Debit	Wire Transfer	Demo
Adyen adyen	Amazon Payment Services	Asiapay pay Install	Authorize.net
Buckaroo	Flutterwave	Mercado Pago	Mollie Install
PayPal	Razorpay	Sips Install	Stripe Install

Screenshot 3: PostFinance Payment Provider

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

ណ៍ ម	lome			A	٢	~
& Account	Balances 1 PAYMENT	Application Users 💿	Creat	e application user		
<b>Space</b>	Payment Contracts PostFinance ISR >	ID All v Deleted Hide v State All v Name All v				
Docs	SPACES	Showing results 1 - 1	20 👻 results per page	Columns 👻		
	🏭 Invites	ID Name A		State		
	USERS	3		✓ Active		
	Users  Application Users  Roles					

Screenshot 4: PostFinance Account Page



• Generate new key -> Copy the generated key.

லி на	ome				<b>A Q</b>
Account	ACCOUNT	User / Application User			
Space	Plan  Plan  Log  Concentration	Application Users			Edit
	6 Web App	Credentials	Generate new key	✓ Active	
	FINANCE	Creation Date Aug 28, 2024, 7:47:03 PM	State	Primary Account	d 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.

III Invoicing Customers Vendors Reporting Configuration					😒 🚱 👼
New Payment Providers PostFinance Payment Providers	Published	Update Payment Methods	Postfinance Gateways	Destfinance Logging	1 / 16 < >
PostFinance Payment Providers         Code ?       PostFinance         State ?       Disabled         © Enabled       Enabled         © Test Mode					FEST HOLE
Website					
Credentials Configuration Messages					
Rest API UserID Rest API SpaceId Application Key					





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

Invoicing Customers Vendors Reporting Configuration	💉 👶 👹
New Payment Providers Postfinance Payment Providers I Destinance Gateways Destfinance Cateways Destfinance Logging	1/16 < >
PostFinance Payment Providers Code <sup>7</sup> PostFinance State <sup>7</sup> O Disabled © Enabled © Test Mode	TEST MODE
Website	
Credentials Configuration Messages	
Rest API UserID	
Rest API SpaceId	
Application Key	

#### Screenshot 7: PostFinance Update Payment Methods

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

Confirm order		1 x Conference (Steel)	Chair \$ 33.00
Billing:	<i>ø</i> ⁰ Edit		
Shipping:		Delivery	\$ 0.00
		Subtotal	\$ 33.00
Choose a delivery method		Taxes	\$ 4.95
Standard delivery	Free	Total	\$ 37.95
Pay with		Discount code	Apply
CHOOSE A PAYMENT METHOD		Pay no	w
		or	
Credit / Debit Card - ONSITE 🗛	• • •	< Back to	o cart
🔿 PayPal 🔺	2 - M		
🔿 PostFinance Pay 🔺	PF Pay		

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 *
MM / YY	
Store the card details for future use.	
Confirm Close	
Screenshot 9: Onsite payment using ifr	ame for Credit/Debit Card payment method

← Cancel payment		
	39.73 CHF	
		4 5
	The TWINT processor is configured to simulate the payment. As such please choose the resu	It which should be simulated.
	Simulate Success Simulate Failure	

Screenshot 10: Offsite payment using TWINT payment method



CourLogo Home Shop Contact us		😭 Q 📞 +1 (650) 555-0111	Contact Us
Thank you for your order. Order \$00102 ©	🖨 Print	1 x Conference C (Steel)	hair \$ 33.00
Payment Information		Delivery	\$ 0.00
PostFinance Payment Providers	Total: \$ 37.95	Subtotal	\$ 33.00
Your payment has been successfully processed		Taxes	\$ 4.95
rou payment has been successiony procession.		Total	\$ 37.95
Billing :			
Shipping:			

#### Screenshot 11: Payment success page

R Q & +1 (650) 555-0111	Contact Us
1 x Conference Chai	r \$ 33.00
(Steel)	
Delivery	\$ 0.00
Subtotal	\$ 33.00
Taxes	\$ 4.95
Total	\$ 37.95
	Q L +1 (650) 555-0111 I x Conference Chair (Steel) Delivery Subtotal Taxes Total

Screenshot 12: Payment Cancel Page



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

Invoicing Customers Vendors Reporting Configuration				💉 🚱 🝯
Payment Acquirer Logging 🕏	Q Search	•		1-80 / 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 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 <u>https://checkout.postfinance.ch/</u> - 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 <u>webshopextension.com</u> or email at <u>support@webshopextension.com</u>.