

User Manual

PostFinance Checkout Flex Payment Plugin for Odoo 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**.



### 3. Screenshots

Install the PostFinance module:

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

Apps Apps				🔍 <sup>15</sup> 🙋 <sup>8</sup> 🙀 Mitchell Ad
ops		Module postfinance * Sea	arch	
		▼ Filters 🛛 ♦ Group By	<b>★</b> Favorites	1-1/1 <>
CATEGORIES PostFinance Checkout Fle	x =			
All Payment Acquirer: PostFin Checkout Flex Implement Payment Acquirer: PostFin Payment Acquirer: PostFin Checkout Flex More infos	ance tion			
Sales PostFinance Payment Acquirer: PostFin Checkout Flex More infos	ance			
Services integrated payment gateways,https://checkout	.postfinance.ch/			
	ARN MORE			
Inventory				
Manufacturing				
Vebsite				
Marketing				
Human Resources				
Productivity				
Administration				
Point of Sale				

Screenshot 1: PostFinance app activation

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

Invoicing Custon	ners Vendors Re	eporting	Configuration					🧈 😒	
New Upload Invo	ices 🏟		Incoterms Banks	iearch	•		1-8 / 8 <		• •
Set your compan head	pany Data y's data for document der/footer. t's start!	ts	Add a Bank Account Accounting Taxes Journals Currencies Fiscal Positions Journal Groups Tax Groups	ents Layout ex of your documents. stomize	Create Invoice Create your first invoice S First invoice sent		Online Paym Enable credit & debit ca supported by st Activate Stri	rd payments ripe.	×
Number	Customer	Invc	Online Payments	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	Ø	\$ 1,799.00	\$ 2,068.85	\$ 2,068.85 Paid	Posted	
INV/2024/00006	jim	08/2	Payment Transactions	Ø	\$ 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 Şearch	•	1-16 / 16 < >
Retifinance Payment Providers Test Mode Retailined	SEPA Direct Debit	Wire Transfer	Demo
َ Adyen عنايرهم استعاد	Amazon Payment Services	Asiapay pag	Authorize.net
Buckaroo	Flutterwave	Mercado Pago	Mollie mollie
PayPal Install	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.

බී Home		<b>A O</b> ~
Account PAYMENT	Application Users 💿	Create application user
Space PostFinance ISR >	ID All v Deleted Hide v State All v Name All v	
Docs Spaces	Showing results 1 - 1	20 v results per page Columns v
Let Invites	D Name 🔺	State
USERS	3	✓ Active
Users  Application Users  Roles		

Screenshot 4: PostFinance Account Page



• Generate new key -> Copy the generated key.

රෝ Ho	me				A Q
& Account	ACCOUNT @B Dashboard	User / Application User			
Space	Plan	Application Users			
	➡ Log	phi obse			Edit
Docs	Organization  Web App	Credentials	Generate new key	✓ Active	
	FINANCE	Creation Date	State		
	PAYMENT	Aug 28, 2024, 7:47:03 PM	✓ Active	Primary Account	ed 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					<b>≪</b> ⁵ ⊘8
New PostFinance Payment Providers	Published	Update Payment Methods	Postfinance Gateways	Postfinance Logging	1/16 <
PostFinance Payment Providers Code ? Postfinance State ? Disabled © Enabled © Test Mode					TRSPRESS
Website					
Credentials Configuration Messages					
Rest API UserID	1				
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.

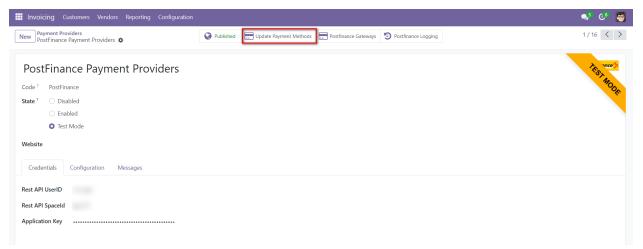


• Navigate to *Website > Configuration > Settings* to create and configure websites as per the requirement.

Website Site e	Commerce Reporting Co	onfiguration	
Save Discard Sett	ings	Q Search	
<ul> <li>General Settings</li> <li>Sales</li> </ul>	Settings of Website	My Website 1 + New Website	
😌 Website	Website Info		
Invoicing	Domain Homepage URL Languages → Install langu	https://www.odoo.com / English (US) × ~	Website     My Website 1       Name     Favicon

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.



Screenshot 8: PostFinance Update Payment Methods

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

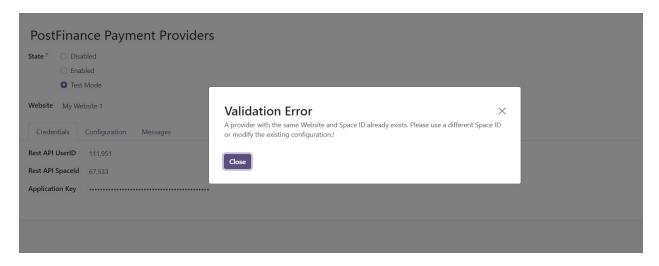


- The application will raise a warning if the user attempts to configure a provider that meets any of the following conditions:
  - Condition 1: Duplicate Website and Space ID Combination
     If a provider with the same combination of Website and Space ID is already configured, the system will raise 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.



DIES



PostFinance Payment Providers		
State ? Disabled Disabled State ? Disst Mode		
Website Credentials Configuration Messages	Validation Error You cannot configure a PostFinance provider using this Space ID without associating it with Website. This Space ID is already linked to another provider.	X
Rest API UserID 111.951 Rest API SpaceId 67,533		
Application Key		

Screenshot 9: Validations

#### **Process Workflow**

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

Confirm order		1 x Conference Chair (Steel)	\$ 33.00
Billing:	🖋 Edit	(Steel)	
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 now	
🔿 Credit / Debit Card - ONSITE 🔺		or < Back to cart	
🔿 PayPal 🔺	P		
🔿 PostFinance Pay 🔺	PFPay		

Screenshot 10: Process Checkout Page

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



Powered By Postfinance Inter	face	>
<ul> <li>Simulation</li> <li>You can use the test information to simulate</li> </ul>	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 payment using I-frame for Credit/Debit Card payment method

← Cancel payment	<b>Ο ΤWINT</b> (i)
	39.73 CHF
	The TWINT processor is configured to simulate the payment. As such please choose the result which should be simulated.
	Simulate Success Simulate Failure

Screenshot 12: Offsite payment using TWINT payment method



Your Logo Home Shop Contact us		😭 Q 📞 +1 (650) 555-0111	Contact Us
Thank you for your order. <sup>Order</sup> s00102 ©	🖨 Print	1 x Conference (Steel)	Chair \$ 33.00
Payment Information		Delivery	\$ 0.00
ostFinance Payment Providers	Total: \$ 37.95	Subtotal	\$ 33.00
Your payment has been successfully processed.		Taxes	\$ 4.95
Tour payment has been successionly processed.		Total	\$ 37.95
Billing :			
Shipping:			

Screenshot 13: Payment success page

KourLogo Home Shop Contact us		😭 Q 📞 +1 (650) 555-0111 Contact Us	
Thank you for your order.	🖨 Print	1 x Conference Ch (Steel)	air \$ 33.00
Payment Information		VIG .	
ostFinance Payment Providers	Total: \$ 37.95	Delivery	\$ 0.00
		Subtotal	\$ 33.00
Your payment has been cancelled.		Taxes	\$ 4.95
Pilling		Total	\$ 37.95
Billing :			
Shipping:			

Screenshot 14: Payment Cancel Page



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

Invoicing Customers Vendors Reporting Configuration		喿 8 🕑 12 My Company (San Francisco) 🦉
Postfinance Payment Provider Logs 🕏	Q. Search	1-80 / 372 < >
Created on	Description	Status Code
02/11/2025 11:03:50	Successfully executed PostFinance Services	200
02/11/2025 11:03:49	Successfully executed PostFinance Services	200
02/11/2025 10:54:43	Successfully executed PostFinance Services	200
02/11/2025 10:54:43	Successfully executed PostFinance Services	200
02/11/2025 10:44:42	Successfully executed PostFinance Services	200
02/11/2025 10:44:41	Successfully executed PostFinance Services	200
02/11/2025 10:33:55	Successfully executed PostFinance Services	200
02/11/2025 10:33:54	Successfully executed PostFinance Services	200
02/11/2025 10:24:14	Successfully executed PostFinance Services	200
02/11/2025 10:24:13	Successfully executed PostFinance Services	200
02/11/2025 10:14:33	Successfully executed PostFinance Services	200
02/11/2025 10:14:32	Successfully executed PostFinance Services	200
02/11/2025 10:03:50	Successfully executed PostFinance Services	200
02/11/2025 10:03:49	Successfully executed PostFinance Services	200
02/11/2025 09:54:01	Successfully executed PostFinance Services	200

### 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 community version 17.0

### 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 4.0.1: February 2025

• Refinement of payment transaction logging feature.

Version 3.0.1: January 2025

• Bug fixes and improvements.

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>.