

User Manual

PostFinance Checkout Flex Payment Plugin v18.0



Table of Contents

1.	Introduction	3
2.	Features	3
З.	Screenshots	4
4.	Brief description	12
5.	Technical Requirements / Compatible With:	13
6.	Limitations	13
7.	Changes Log / Release Notes	13
8.	Support	14



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, PayPal, 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.

pits

3. Screenshots

Install the PostFinance module:

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

Hpps Apps		😞 15 🕜 8 🕼 Mitchell Admin
Apps	Module postfinance * Search_	Q
	▼ Filters 💲 Group By ★ Favorites	1-1/1 <>
CATEGORIES All Sales Services Accounting Inventory Manufacturing Website Marketing Human Resources Productivity Administration Point of Sale	PostFinance Checkout Flex 1 Payment Acquier: PostFinance Payment Acquier: PostFinance Checkout Flex More Infos on Integrated payment agarwayt.https://checkout.postfinance.ch/ Activity LEARN MORE	
	Screenshot 1: PostFinance app activation	

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

Invoicing Cust	omers Vendors Re	eporting	Configuration						2 5	ି 🖉
New Upload Inv	roices 🌣		Incoterms Banks	earch	Ţ		1	-8/8 <		• •
Company Data Set your company's data for documents header/footer. Let's start!		ts	Add a Bank Account Accounting Taxes Journals Currencies Fiscal Positions Journal Groups Tax Groups	ents Layout sk of your documents. stomize	Create Invoice Create your first invoice S First invoice so) pice: ent!	Enable c	Dnline Payme redit & debit ca upported by St Activate Strip	ents rd payments ripe. pe	
Number	Customer	Invc	Online Payments	Activities	Tax Excluded	Total	Total in Currency	Payment	Status	ŧ
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	Ø	\$ 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	onfiguration		🐋 O ⁸ 😽
Payment Providers	Q ķearch	•	1-16 / 16 < >
Addfinance Payment Providers Test Mode Publiched	SEPA Direct Debit	Wire Transfer	Demo
Adyen adyen install	Amazon Payment Services	Asiapay pay Install	Authorize.net
Buckaroo	Flutterwave	Mercado Pago	Mollie
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.

ណឹ ម	lome			A	۲	
& Account	Balances PAYMENT	Application Users	Create	application user		
P Space	 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		
	Lusers					
	Application Users Roles					

Screenshot 4: PostFinance Account Page



• Generate new key -> Copy the generated key.

லி на	ome				A C	2	-
Account	ACCOUNT BB Dashboard	User / Application User					
Space	Plan Invites Log Organization	Application Users			Edit		
	% Web App	Credentials	Generate new key	✓ Active	0		
	FINANCE	Creation Date Aug 28, 2024, 7:47:03 PM	State	Primary Account	d Acti		
	Payment Contracts	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 🕸	Se Published 🔚 Update	e Payment Methods	Postfinance Gateways	Destfinance Logging	1/16 < >
PostFinance Payment Providers Code ² PostFinance State ² Disabled Enabled Enabled Test Mode Test Mode					TEST NODE
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 Settings Q Search							
General Settings	Settings of Website	My Website 1 + New Website					
S Website	Website Info						
Invoicing	Domain Homepage URL Languages → Install langu	https://www.odoo.com / Enalish (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 ⁷ Postfinance State ⁷ O Disabled O Enabled O Test Mode	TEST 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.



- 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	Close	
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.	na			
Rest API UserID 111,951	Gose				
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 Ch (Steel)	nair \$ 33.00
Billing: Shipping:	₽ Edit	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 K Back to c	art
🔿 PayPal 🔺	22.00		
O PostFinance Pay 🔺	PF Pay		

Screenshot 10: Process Checkout Page

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



-

×



Screenshot 11: Onsite payment using I-frame for Credit/Debit Card payment method





Thank you for your order. Order S00102 ©	🖨 Print	1 x Conference (Steel)	Chair \$ 33.00
Payment Information		Definer	t o o
PostFinance Payment Providers	Total: \$ 37.95	Subtotal	\$ 0.00
Your payment has been successfully processed		Taxes	\$ 4.9
four payment has been successfully processed.		Total	\$ 37 95

Screenshot 13: Payment success page



Home Shop Contact us		Q L +1 (650) 555-0111	Contact Us
Thank you for your order.	🖨 Print	1 x Conference Cha (Steel)	ir \$ 33.00
Payment Information			
PostFinance Payment Providers	Total: \$ 37.95	Delivery	\$ 0.00
		Subtotal	\$ 33.00
Your payment has been cancelled.		Taxes	\$ 4.95
Billing :		Total	\$ 37.95
Shinning:			

Screenshot 14: Payment Cancel Page

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

Invoicing Customers Vendors Reporting Configuration			👟 Ca 😂
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 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 18

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 1.0.0: October 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>.