

# Installation Manual for Concardis PayEngine WooCommerce

This manual describes the installation and usage of the Concardis PayEngine extension for WooCommerce.

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# 1 Introduction

This manual explains the installation, configuration and usage of the payment module for WooCommerce and Concardis PayEngine. It is important that you strictly follow the described steps. Only by doing so, a secure usage in compliance with all security regulations can be guaranteed.

Before beginning with the installation, please make sure that you are in possession of all necessary data:

- PSPID & Password. You receive these credentials from Concardis PayEngine after conclusion of contract. Our support staff is happy to help you acquiring a Concardis PayEngine contract if you do not yet have one.
- WooCommerce payment module from [sellxed.com/shop](https://sellxed.com/shop)
- FTP access to your server
- Login credentials for your shop

## 1.1 Procedure of the Installation

1. Configuration of the administration interface of Concardis PayEngine.
2. Upload of the module
3. Configuration of the [basic settings](#) of the [payment module](#)
4. Configuration of the **payment methods**
5. Carrying out a test purchase by means of the attached [test data](#) at the end of this document
6. If the test was successful, copy all data from your test account into the Concardis PayEngine live account.

## Installation Service

Our payment plugins should have per default the correct settings for most of our customers' preferences. That means once you have entered the required credentials in the plugin configuration to connect your account to your website, the plugin should be fully operational. Should you be willing to receive detailed informations on a setting you do not know, you may contact our support team who will be able to assist you further.

Our support team is at your disposal during regular business hours at: <http://www.sellxed.com/support>. Furthermore, you have the option of ordering our installation service. We will make sure the plugin is installed correctly in your shop: <http://www.sellxed.com/shop/de/integration-und-installation.html>

## .htaccess Directory Protection

In order to test the module, any kind of directory protection or IP blocking on your server must be deactivated. This is crucial; otherwise the payment feedback of Concardis PayEngine might not get through to the shop.

## 1.2 System Requirements

In general, the plugin has the same system requirements as WooCommerce. Below you can find the most important requirements of the plugin:

- PHP Version: 5.4.x or higher
- OpenSSL: Current version with support for TLS 1.2 or higher.
- fsockopen: The PHP function fsockopen must be enabled. The plugin must be able to connect to external systems over the Internet.
- PHP Functions: All common PHP functions must be enabled.

## 2 Configuration Concardis PayEngine - Back-End

For the configuration, log into the Concardis PayEngine back-end:

- Test Environment: <https://secure.payengine.de/ncol/test/backoffice>
- Live Environment: <https://secure.payengine.de/ncol/prod/backoffice>

The settings carried out on the following pages are a precondition for the [configuration of the main module](#).

The configuration of the settings is done under **Configuration > Technical Information**. In the following chapter the chapter titles correspond to the tabs in the back office of Concardis PayEngine. For some parts screenshots will be added for a more precise illustration. Should a specific setting not be mentioned then it has no importance for the configuration of the payment module and can be ignored by you as such.

### 2.1 Tab: Global Transaction Parameters

Under the tab Global Transaction Parameters you define the basic settings for the processing of transactions.

#### 2.1.1 Default operation code and default data capture procedure

We recommend choosing **Sale** and **"Automatic data capture by our system at the end of the day"**. All incoming payments will be directly processed and debited. If you are using transaction management and deferred capturing we strongly advise to use these settings. In case you have saved different settings in the module, then the module's settings will overwrite those of the Concardis PayEngine.

#### 2.1.2 Payment Retry

We recommend entering **10**.

#### 2.1.3 Processing for Individual Transactions

We recommend the option **"Online but switch to offline when the online acquiring system is unavailable"**.

### 2.2 Tab: Global Security Parameters

Here you define the security parameters for the interaction between your shop and the gateway of Concardis PayEngine.

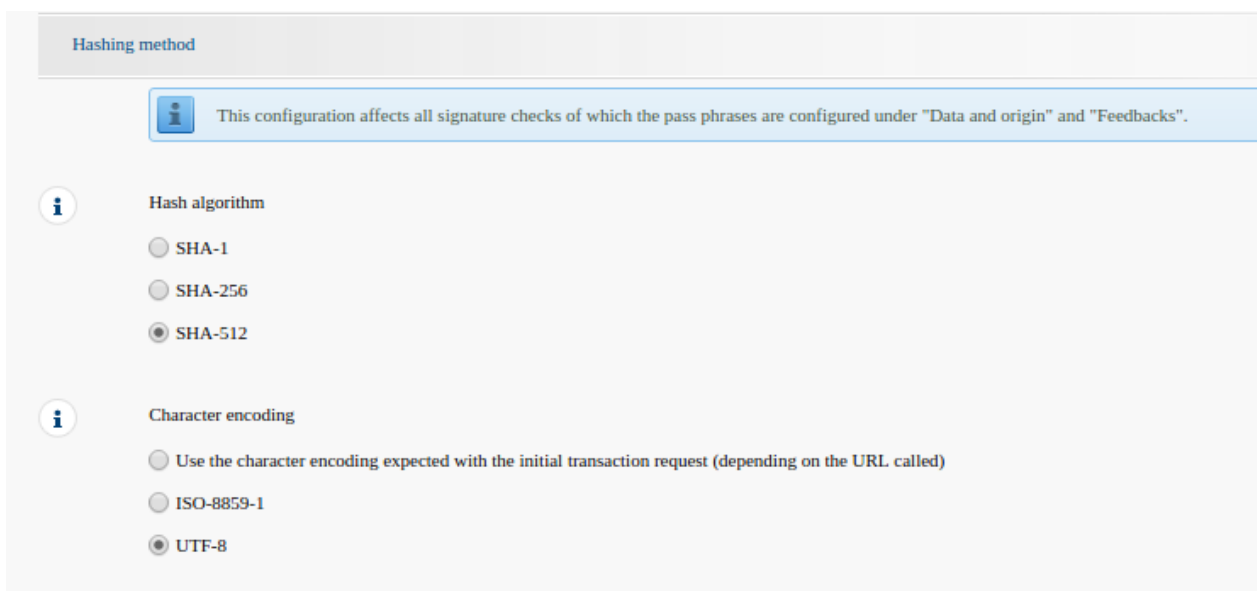


## 2.2.1 Hashing Method

The sellxed payment modules support all hashing methods. In order for the module to function, it is crucial that the settings saved with Concardis PayEngine correspond to those made in the back-end of your shop.

In order to guarantee a smooth processing of payments, we recommend the following hashing methods:

- Each parameter, followed by the pass phrase. It may be that this parameter is not visible in your shop. In this case it is transmitted automatically.
- Hash Algorithm = SHA 512
- Character Encoding = UTF-8



**Figure 2.1:** Configuration of the SHA-Hash.

These settings must be identical to the settings in the main module (cf. [Configuration of the main module](#)). Please note that the character encoding in our modules is set to UTF-8 per default and cannot be changed.

## 2.3 Tab: Payment Page

The checkbox under **Cancel Button** should be ticked. The field under Back Button Redirection can be left empty.

## 2.4 Tab: Data and Origin Verification

The tab Data and Origin Verification defines security elements concerning the transmission of data and the loading of the payment page.

### 2.4.1 Checks for e-commerce & Alias Gateway

The first box under "URL of the merchant page" can remain empty.

The box "SHA-IN pass phrase" is a security element of the payment verifying its authenticity. Therefore it is important that you use the same pass phrase in the back end and in the shop.

#### Customweb SHA-String Generator

Please note that only ASCII characters may be used for SHA pass phrases. Please use our [SHA pass phrase generator](#) so that you do not enter invalid characters.

### 2.4.2 Checks for Concardis PayEngine DirectLink and Concardis PayEngine Batch (Automatic)

DirectLink allows you to use the Hidden Authorisation (Alias Gateway) as well as the direct debiting of transactions within your shop. If you have activated DirectLink in your account and wish to use this feature, enter **the same** SHA-IN pass phrase in the box "SHA-IN pass phrase" as above.

Further information on the configuration of DirectLink can be found under [Configuration Hidden Authorisation](#).

## 2.5 Tab: Transaction Feedback

In the tab Transaction Feedback the response of Concardis PayEngine to the shop is controlled.

### 2.5.1 HTTP Redirection in the Browser

The parameters in the transaction feedback determine the processing in the shop after payment has been completed. However, the four fields for "HTTP Redirection in the Browser" can remain **empty** because they will be configured through the settings of our module.

**Un-tick** the option "I would like Concardis PayEngine to display a short text to the customer on the secure payment page if a redirection to my website is detected immediately after the payment process."

### 2.5.2 Direct HTTP-Server-to-Server-Request

- The "Timing of the Request" must be set to **Online but switch to a deferred request when the online requests fail**. As "Request Method" you must select **"POST"**.
- In the section **General** make sure that the Option: "I would like Concardis PayEngine to display a "processing" message to the customer during payment processing." is **un-ticked** too.
- Copy here the URL that is listed in the module backend under: **Concardis PayEngine > Setup**

URL on which the merchant wishes to receive a deferred HTTP request, should the status of a transaction change offline.

For the **Transaction Feedback** please enter the URL that is generated in the main module. More information can be found under the section [Transaction Feedback](#)

## All orders have the status 'Pending'

Should you notice during the tests that orders are not registered in the shop and that no confirmation email is sent, this might be due to a failure of the transaction feedback. Make sure that your firewall is not blocking any request coming from Concardis PayEngine.

**Direct HTTP server-to-server request**

**i** Timing of the request

No request.  
 Always deferred (not immediately after the payment).  
 Always online (immediately after the payment to allow customisation of the response seen by the customer).  
 Online but switch to a deferred request when the online requests fail.

**i** URL of the merchant's post-payment page

If the payment's status is "accepted", "on hold" or "uncertain".

SEE MANUAL FOR THIS URL // URL GEMÄSS MANUAL

If the payment's status is "cancelled by the client" or "too many rejections by the acquirer".

SEE MANUAL FOR THIS URL // URL GEMÄSS MANUAL

Request method

POST  
 GET

**Figure 2.1:** Configuration of the feedback URL for the HTTP-Feedback.

## Deferred Requests und Time Out

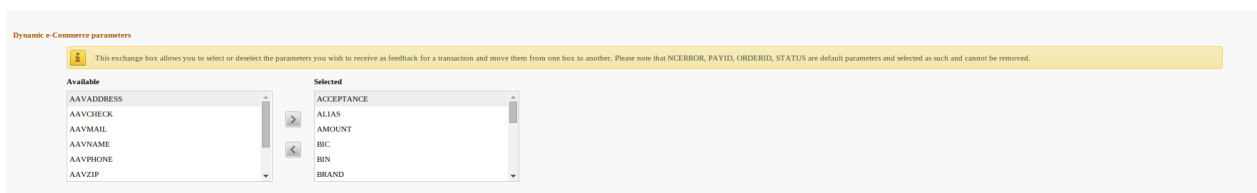
Concardis PayEngine sends the notification requests with a time out of 20 sec. Should your shop not respond to the HTTP Request within this time, a time out error will be sent. If you set the option to **Online but switch to a deferred request when the online requests fail** the request will be retrieved four times in ten minute intervals.

Please note that, depending on your Concardis PayEngine subscription, it is possible that the only option available is **Always online (immediately after the payment to allow customization of the response seen by the customer)**. In this case, always select this option.

### 2.5.3 Dynamic e-Commerce Parameters

With this option you control which parameters are sent in the response from Concardis PayEngine. In order for payments to effectively be evaluated in your shop, all necessary parameters must be sent. It is possible that you have other options available to select. Just make sure that you move every parameter from **available** to **selected** except for the following:

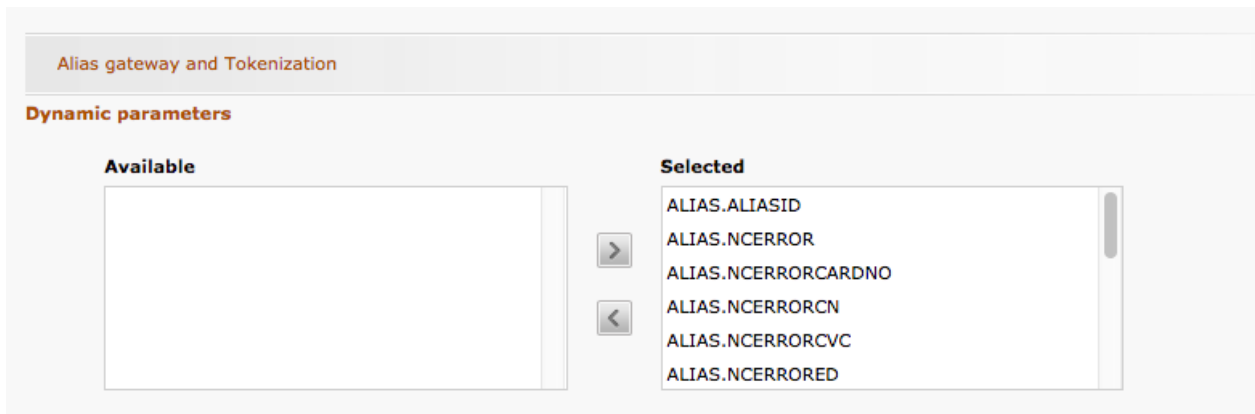
- PM
- CN
- SUBBRAND
- AAVADDRESS
- AAVCHECK
- AAVMAIL
- AAVNAME
- AAVPHONE
- AAVZIP



**Figure 2.1:** Configuration of the Dynamic E-Commerce Parameters. Your selection may look differently depending on your subscription with Concardis PayEngine.

### 2.5.4 Dynamic Parameters

With this option you control which parameters are sent in the response from Concardis PayEngine. In order for payments to effectively be evaluated in your shop, all parameters must be sent. It is possible that you have other options available to select. Just make sure that you move **every** parameters from **available** to **selected**.



**Figure 2.1:** Configuration of the Dynamic Parameters. Your selection may look differently depending on your subscription with Concardis PayEngine.

### 2.5.5 Security for Request Parameters

The box "SHA-OUT pass phrase" is an additional safety mechanism for payments. Here too must the entered pass phrase be identical to the one in your shop. However, please make sure that your SHA-OUT pass phrase differs from the SHA-IN pass phrase. .

#### Customweb SHA-String Generator

Please note that only ASCII characters may be used for SHA pass phrases. Please use our [SHA pass phrase generator](#) so that you do not enter invalid characters.

### 2.5.6 HTTP Request for Status Changes

You have the option to be informed about status changes by Concardis PayEngine directly. This feature is especially useful when a payment has an uncertain status because the acquirer system could not be reached. The payment status will be updated automatically. Furthermore this feature allows you to capture payments inside Concardis PayEngine and have synchronize them with your shop

In order to use this feature you will have to select the option **For each offline status change (payment, cancellation, etc.)**. Afterwards just copy the URL into the field that is displayed in the Setup of your Main configuration: **Concardis PayEngine > Setup**.

Enter the URL shown there into the field 'URL on which the merchant wishes to receive a deferred HTTP request, should the status of a transaction change offline.'

**HTTP request for status changes**

**i** Timing of the request

No request.

Only at the time of the order authorisation request.

For each offline status change (payment, cancellation, etc.).

URL on which the merchant wishes to receive a deferred HTTP request, should the status of a transaction change offline.

Figure 2.1: Enter the URL from the Setup of the Main Configuration.

### 2.5.7 Dynamic Parameters

Move all parameters from **available** to **selected**.

## 2.6 (Dynamic-)Template

You can now find the option template via **Configuration > Template**. The Dynamic Template enables you to design the payment mask for the credit card data so it matches your web shop. Should the field for the dynamic template not be visible, please contact Concardis PayEngine. It may be that you have to activate additional options in your account.

For the usage of the dynamic template, please save the following settings:

- Enable JavaScript on template: **'No'**
- Our modules do not allow "usage of static template". So click 'No'
- Allow usage of dynamic template: **'Yes'**
- In case you are using the dynamic template, enter the host name, i.e. `https://Your-Shop.com` in the lower box. The upper one must remain empty.

**Template**

**i** Enable JavaScript check on template

Yes

No

Allow usage of static template

Yes

No

Trusted static template name

**i** You may enter several template names, separated by ";" (e.g. template1.htm; template2.php)

Allow usage of dynamic template

Yes

No

Trusted dynamic template URL

**i** You may enter several template URL, separated by ";" (e.g. https://www.domain.com/tmp/template1.htm; https://www.domain.com/template2.php)

Trusted website hostname hosting the dynamic template

**i** You may enter several website hostnames, separated by ";" (e.g. https://www.domain.com; https://www.otherdomain.com)

**Figure 2.1:** Configuration of the Dynamic Template.

### Dynamic Template

Please note that you require an SSL certificate for the usage of the dynamic template. Otherwise the CSS-Resources will not be reloaded in certain browsers which might lead to layout issues.

The activation of the dynamic template in the shop is explained [here](#).

## 2.7 Hidden Authorisation, Ajax Authorization (FlexCheckout - Hosted Tokenization Page), External Checkout & Alias Manager

### 2.7.1 Preconditions

For the usage of the Hidden Authorization, Ajax Authorization (FlexCheckout), Alias Manager or External Checkout during the payment processing, certain adjustments are necessary in the back-end of Concardis PayEngine. Please check first if the options are activated in your account under **Account > Your Options**.

ID	Option	Activation	Monthly fee	Transaction/Unit cost	Status	
AFTP	AFTP Module	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
D3D	D3D (Direct Link 3D)	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
ELVDE	ELV (Direct Debits Germany)	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a> <a href="#">Configuration</a>
FAQQ	Foreign acquirers	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
INV	Invoice appearance	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
NPMA2	Foreign payment methods (fees per payment method activated) - CH	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
OPC	One Page Checkout	0 EUR	0 EUR	0 EUR	Active	<a href="#">Deactivate</a>
RECO1	Reconciliation Module	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
RECX	Alias Manager	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a> <a href="#">Configuration</a>
SCH	Scheduled Payments	0 CHF	0 CHF	0 CHF	Available	<a href="#">Activate</a>
SUB	Subscription manager	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a>
USR4	User Manager up to 20 users	0 CHF	0 CHF	0 CHF	Active	<a href="#">Deactivate</a> <a href="#">Configuration</a>
USR5	User Manager up to 50 users	0 CHF	0 CHF	0 CHF	Available	<a href="#">Activate</a>
USR6	User Manager up to 100 users	0 CHF	0 CHF	0 CHF	Available	<a href="#">Activate</a>
USR7	User Manager up to 200 users	0 CHF	0 CHF	0 CHF	Available	<a href="#">Activate</a>

(1) CAP1 : Includes transaction fee for 3-D Secure transactions

**Figure 2.1:** Make sure to activate the OPC and DPR options.

If an option is not available please contact Concardis PayEngine.

### Options and their Meanings:

- For the usage of the Hidden Authorization you require the option **OnePageCheckout (OPC)**.
- For the usage of the Ajax Authorization (FlexCheckout) you require the option **OnePageCheckout (OPC)** and **DirectLink (DPR)**.
- If you additionally want to use the Alias Manager, you also need the option **Alias Manager (RECX)**.

In case these options are not be available, please contact Concardis PayEngine directly.

## 2.7.2 Setting Up an API-User

If you want to use the features of the transaction management or the hidden authorization (Alias Gateway) you will need to set up an API user as described herafter:

Go to **Configuration > User Administration** and click on 'New User'. Choose a **User ID** and insert a user name of your choice and your e-mail address. Select **Administrator without user manager** as a profile. It is furthermore important that you select the option **Special user for API (no access to the administration)**. If you do not see this option, you will need to let Concardis PayEngine activate the option DirectLink for your account.

### Password of the API-User

The User ID and the API-user password may only contain letters and numbers as well as special characters. The following special characters are not allowed: & (Ampersand), " (double quotes), ' (single quotes)

Note down the access data. They will have to be inserted in the respective place in the [configuration of the main module](#).

## 2.7.3 Usage of the Alias Manager for Recurring Payments

The sellxed payment modules integrate recurring payments via the option **Alias Manager and Direct Link** and not via the Subscription Manager of WooCommerce. Please make sure, therefore, that both options are activated in your Concardis PayEngine account.

In order to be able to use the Alias for recurring payments, you must ensure that the token which is generated by Concardis PayEngine is re-transmitted to your shop. It is important, therefore, that you make sure that the Alias is part of the transaction feedback. To do so, please check the following steps:

1. Make sure that the parameter **ALIAS** is listed under 'Selected' (see screenshot 1 - Dynamic e-commerce Parameters).
2. The parameter **ALIAS** must also be selected in the Direct Link parameters (see screenshot 2 - Dynamic Parameters Direct Link).



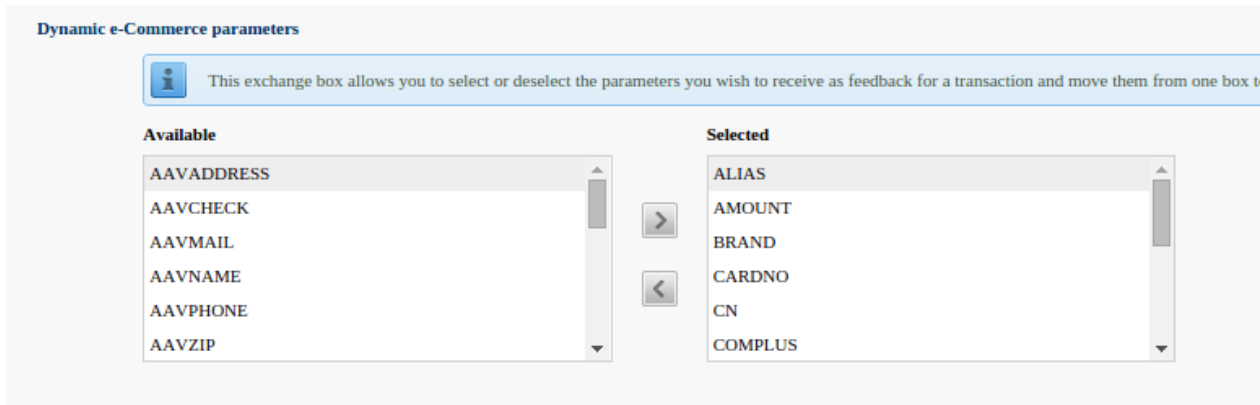


Figure 2.1: Screenshot 1 - Dynamic e-commerce Parameters.

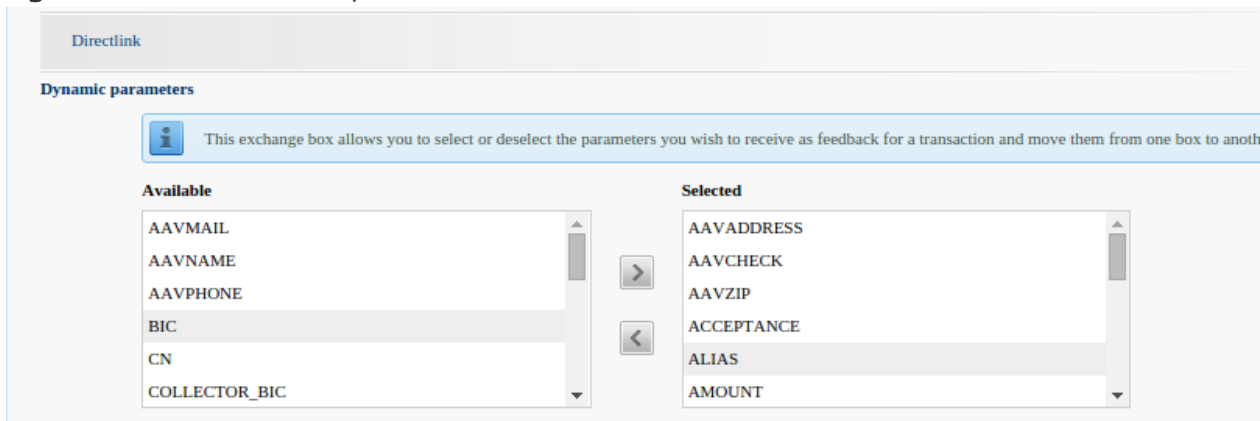


Figure 2.1: Screenshot 2 - Dynamic Parameters Direct Link.

## 2.7.4 Usage of External Checkouts

For the usage of external checkouts there are additional options required. External checkouts, such as MasterPass are payment methods, which offer the possibility to transfer addresses automatically.

The usage of the external checkouts asks for the option Direct Link and for the activation of payment method in your account.

For the performance of the payment method, you have to make sure that under Technical Information > Transactionfeedback in the section Direct Link all parameters selected are shifted

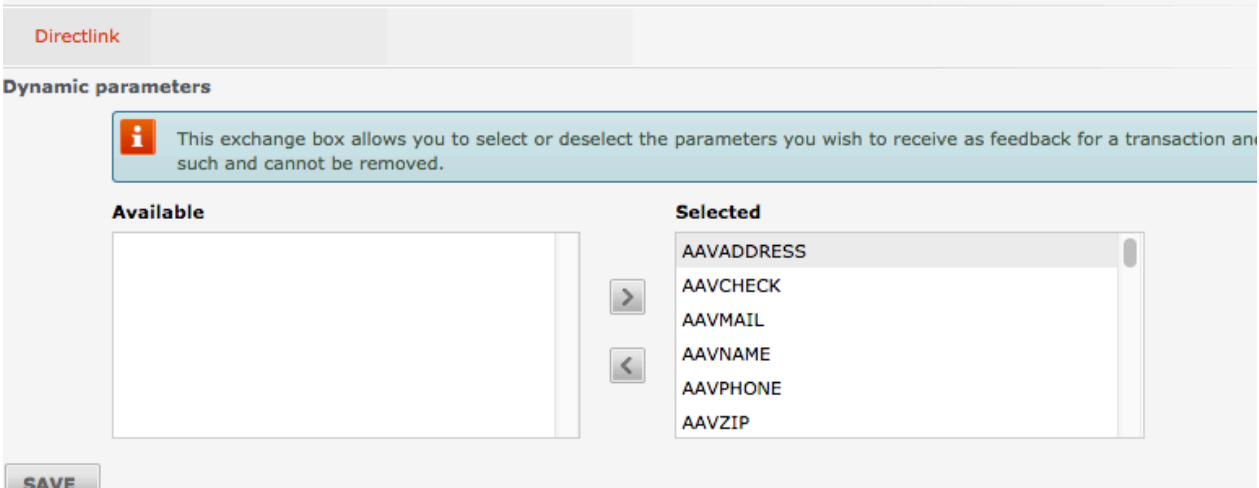


Figure 2.1: Response Parameter for Direct Link.

## 3 Module Installation and Update in the WooCommerce Shop

### 3.1 Installation

At this time you should already be in possession of the module. Should this not be the case, you can download the necessary files in your customer account in the [sellxed shop](#) (Menu "My Downloads Downloads"). In order to install the module in your shop, please carry out the following steps:

1. Download the plugin. The download can be found in your sellxed.com account under "My Downloads".
2. Unzip the archive you have just downloaded.
3. In the unzipped folder navigate to the folder "files"
4. For some shops there are different versions of the plugin provided. If this is the case open the folder which corresponds to your shops version.
5. Using your preferred FTP client upload **entire content** of this folder into the root directory of your shop. For some shops there is a specific folder containing the plugins. If thats the case upload the plugin into this folder. Make sure that the folders aren't replaced but merely merged.
6. If you haven't yet done so, log back into your shop.

### 3.2 Updates and Upgrades

You have direct and unlimited access to updates and upgrades during the duration of your support contract. In order to receive constant information about available updates we ask you to subscribe to our RSS feed that we publish for your module.

More information regarding the subscription of this RSS feed can be found under: [http://www.sellxed.com/en/updates\\_upgrades](http://www.sellxed.com/en/updates_upgrades).

We only recommend an update if something doesn't work in your shop, if you want to use new feature or if there is a necessary security update.

#### 3.2.1 Update Checklist

We ask you to strictly comply with the checklist below when doing an update:

1. Always do a back up for your database and your files in your shop
2. Use always a test system to test the update process.
3. Wait until all the files are copied to the shop, clear the cache if there is one in your shop and then visit the configuration page of the main module so that the update process will be initialized.

### Do not do updates directly in the live environment

Please test the update procedure first in your test shop. Our support team is able and willing to help you if you experience problems with the update process. However, if you decide to perform the update directly in your live shop there is the possibility of a downtime of the shop of more than two days depending on the availability of our support if you do not want to book our [complementary support](#).

Depending on the version it could be that the database has to be migrated. We recommend you therefore, to perform the updates in times when the shop is not visited too frequently by your customers

### 3.2.2 Update Instructions

Please always read the update instruction. They can be found on the plugin page in the shop under the section change log on the lower end of the page. If there are no special remarks, you can proceed by just overwriting the files in your system

## 4 Module Configuration in the WooCommerce Shop

The configuration consists of two steps. The first step is the configuration of the main module with all the basic settings (cf. [Configuration of the Main Module](#)). During the second step you can then carry out individual configurations for each [payment method](#). This allows for full flexibility and perfect adaptation to your processes.

### Create back-ups!

Please create a back-up of the main directory of your shop. In case of problems you will then always be able to return your shop to its original state.

We furthermore recommend testing the integration on a test system. Complications may arise with third party modules installed by you. In case of questions, our support is gladly at your disposal.

### 4.1 Configuration of the Main Module

You can activate the plug-in by clicking "activate" under the module WooCommerce Concardis PayEngine in the menu **Plugins**.

After the Installation of the plugin a new menu on the dashboard will appear called **Concardis PayEngine**. Enter all data in the corresponding fields. The required data has either already been saved in the back-end of Concardis PayEngine has been sent to you by Concardis PayEngine. Each option is, furthermore, explained in short info texts in the shop.

### 4.2 Defining the URL for the Transaction Feedback

To ensure correct payment processing in your shop, at least one Feedback URL has to be provided in the Concardis PayEngine configuration. The URL to be entered can be found in your WooCommerce Shop under: **Concardis PayEngine > Setup > Setup**

### 4.3 Configuration of the Payment Module

After having successfully configured the main module, you can find the settings for the individual payment methods in your shop under **WooCommerce > Settings > Checkout** (In earlier version it was **WooCommerce > Settings > Payment Gateways**). Each payment method is listed individually. Install the payment methods you wish to offer to your customers. You can carry out individual settings for each payment method and thereby optimally adapt the payment methods to your existing processes. The most central options are described in more detail further below.

By clicking on **Enable** the payment method is activated in your shop. For more detailed information on the settings, please refer to information provided directly within the module configuration.

## 4.4 Shop ID

In the case of a multi-store set up (cf. [chapter: Multi-Store](#)), the parameter Shop ID identifies the shop's request and, therefore, redirects the feedback of Concardis PayEngine based on the shop ID.

## 4.5 Order Prefix

With the option order prefix you can define your own order scheme for the transmission to Concardis PayEngine. This option helps you identify to which shop a transaction the back-end of Concardis PayEngine is related to. The tag "{id}" will automatically be replaced by the consecutive order number.

## 4.6 Selecting the Authorisation Method

You can choose between two options of authorizing credit card payments. By selecting one of the two under the option 'Authorisation Methods', you define how you want to process the individual payment methods.

Further information on the various authorisation methods can be found on our [sellxed website](#).

### Payment Processing

Please pay attention to the fact that you require the activation of further options with Concardis PayEngine in order to use some of the authorisation methods.

It may be that certain authorization methods are not available for every payment method.

Alongside the introduction of PCI 3 there are additional certification requirements in case you are using the authorization method Hidden or AJAX. Please contact Concardis PayEngine for further information or switch to another authorization method.

## 4.7 Direct Capturing of Transactions

The option "Capture" allows you to specify if you wish to debit payments directly or if you first wish to authorise them and the debit the payment at a later point.

Depending on your acquiring contract, a reservation is only guaranteed for a specific amount of time. Should you fail to debit the payment within that period, the authorisation may therefore no longer be guaranteed. Further information on this process can be found below.

### Different settings between Concardis PayEngine and the module

It may be that settings saved in the payment modules overwrite settings saved in Concardis PayEngine.

## 4.8 Uncertain Status Status

You can specifically label orders for which the money is not guaranteed to be received. This allows you to manually control the order before shipment.

### 4.8.1 Setting the order state

For each payment method you may select in which state the order should be set to depending on the booking state. This is the initial state of the order.

## 4.9 Optional: Validation

Note: It can be that this option is not visible in your module. In this case just ignore this section.

With the option 'Validation' you can define the moment when the payment method should be made visible to the customer during the checkout process. This setting is relevant for modules where the usage depends on the customer's compliance with specific preconditions. For example, if a solvency check has to be carried out or if the payment method is only available in certain countries. You have the choice between these options:

- **Validation before the selection of the payment method:** A validation verification is carried out before the customer selects the payment method. If he or she does not fulfill the requirements, the payment method is not displayed
- **Validation after selection of the payment method:** The verification of the compliance occurs after the selection of the payment method and before the confirmation of the order
- **During the authorisation:** The validation verification is carried out by Concardis PayEngine during the authorisation process. The payment method is displayed in any case

## 4.10 Multi-Shop Set-Up

The payment module is designed for the usage of one Concardis PayEngine contract for several shops. It must be differentiated, however, between the case of an integrated multi-shop functionality and independent shops:



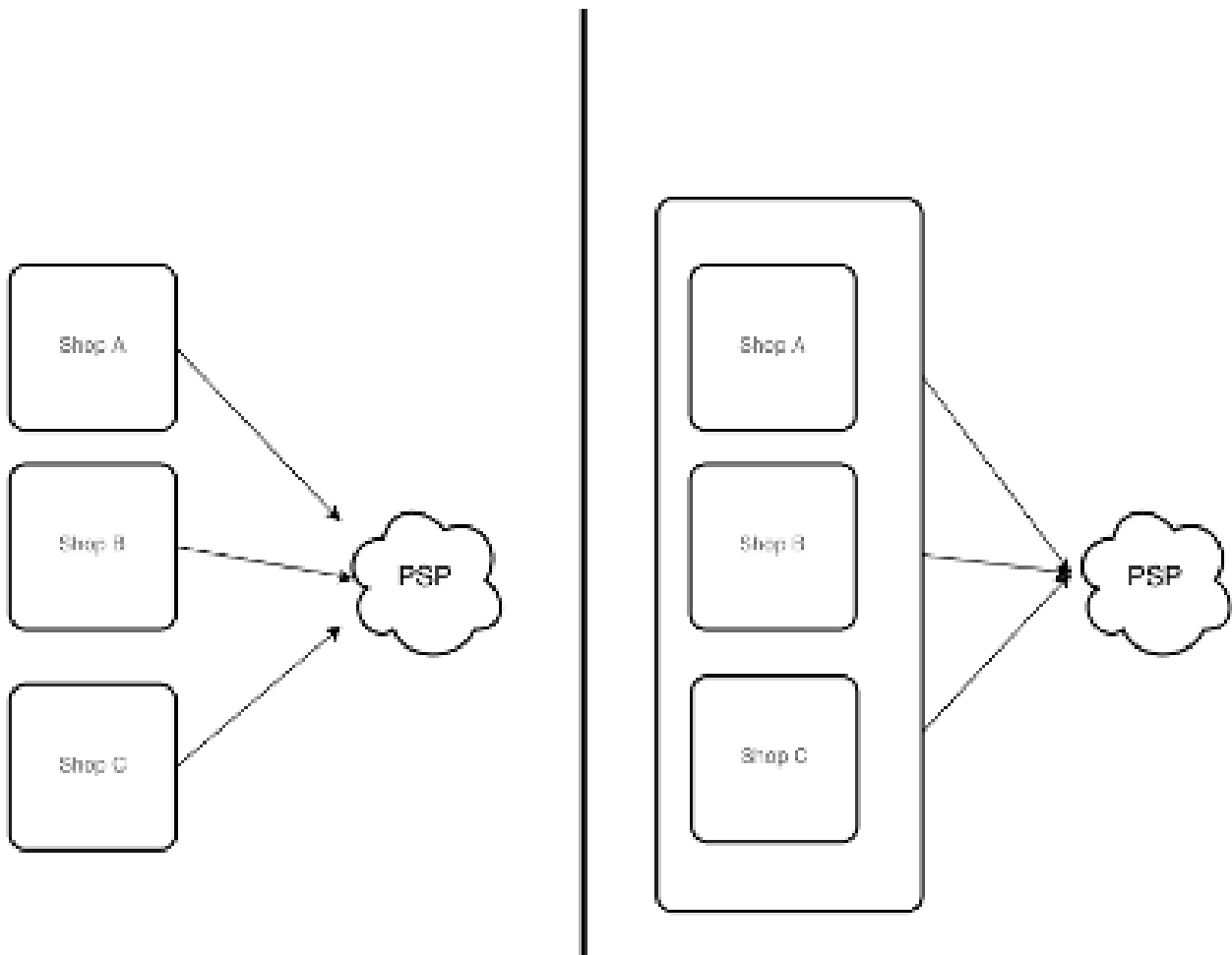


Figure 4.1: Multi-shop set-up

## Licensing

In the case of independent shops, you require a payment module license for each shop. For scale prices, please contact us directly.

### 4.10.1 Usage of several independent WooCommerce shops

In case you wish to connect several independent shops to one contract with one contract with Concardis PayEngine, you require a sellxed payment module for each shop as well as the corresponding multi-shop module which you will find directly by the payment module.

1. Extract the multi-shop module and open the file "router.php"
2. Enter a shop ID of your choice in the box "Shop ID" within the main configuration of the module (e.g. shop\_a and shop\_b)
3. Enter the following line into the corresponding place within the file router.php of the multi-shop module (for each shop shop\_a and shop\_b):

```
$redirect['shop_a'] = 'https://www.your-shop.com/wp-content/plugins  
/woocommerce_payenginecw/notification.php';
```

4. Enter the URL below (instead of the URL mentioned above) under the point "Feedbacks" in the back-end of Concardis PayEngine: **http[s]://yourshop.com/router.php**
5. Copy the file router.php into the main directory of your shop

## 4.11 Redirection / Payment Form Error

If the successful redirection to the payment page suddenly stops working or you are only able to see the header and footer of your template instead of the payment form, you might be affected of the following issue. As a first step, you should update your payment plugin to the latest version, deactivate it in the backend of WooCommerce and activate it again.

If you are using **WPML**, it can happen that the pages for the display of the payment methods or for the redirection to Concardis PayEngine result in a '404 Page Not Found' error. In this case, you will have to duplicate our checkout page under 'Pages' in the corresponding languages. In order to do so please follow these steps:

1. Go to the WooCommerce backend and select: Pages > All Pages. There you should find a Page called "Concardis PayEngine Checkout".
2. Delete all existing pages called "Concardis PayEngine Checkout".
3. In the plugin section of your Wordpress dashboard, deactivate the WooCommerce Concardis PayEngine plugin and activate it again. This will help you to generate a new redirection page.
4. Navigate again to Pages > All Pages. Open the configuration of the new redirection page.
5. On the right hand side under 'languages' you can now duplicate the content of this page for all of your installed languages. When you have successfully saved the changes, this page will be active for all of your languages and the error should have disappeared.

## 5 Settings / Configuration of Payment Methods

### 5.1 General Information About the Payment Methods

The plugin contains the most common payment methods. In case a desired payment method is not included per default, please contact us directly.

In order to be able to use a payment method, it must be activated in your account with Concardis PayEngine as well as in your shop. Information about the configuration of the payment methods can be found further above.

Below you can find important information for specific payment methods that deviate from the standard process.

### 5.2 Information on Payment Status

For each payment method you can define an initial payment status (status for authorized payments etc.). You hereby define the payment status for each state depending on the processing type of the order (captured, authorized, etc.). It's the initial status which the order assumes. Depending on the mutation carried out by you, the status can change.

#### Important info regarding Order Status

Never set the status to **Pending Concardis PayEngine** or any similar pending status which is implemented by the module.

#### 5.2.1 Order status "pending" / imminent payment (or similar)

Orders with the status 'pending Concardis PayEngine' are pending orders. Orders are set to that status if a customer is redirected in order to pay but hasn't returned successfully or the feedback hasn't reached your shop yet (Customer closed window on the payment page and didn't complete payment). Depending on the payment method these orders will automatically be transformed into cancelled orders and the inventory will be cleared (so long as the Cronjob is activated). How long this takes depends on the characteristics of the payment method and cannot be configured.

If you have a lot of pending orders it usually means that the notifications from your webserver to Concardis PayEngine are being blocked. In this case check the settings of your firewall and ask the Hoster to activate the IPs and User Agents of Concardis PayEngine.

#### 5.2.2 Order status "cancelled"

Orders with the status "cancelled" have either been set to that status automatically due to a timeout, as described above, or have been cancelled directly by the customer.

### 5.3 Usage Hidden Authorisation / Alias Gateway

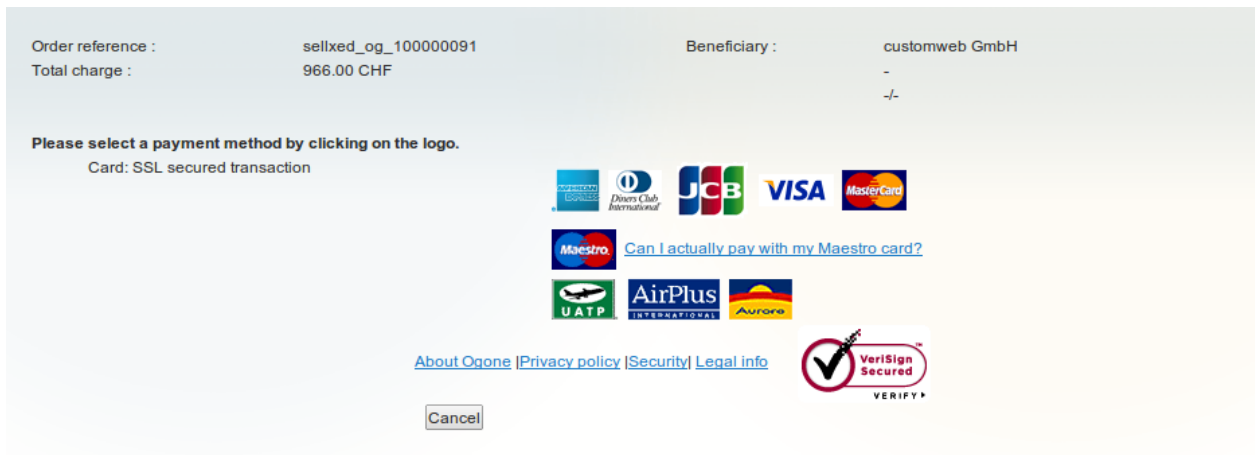
You have the possibility of processing credit cards without redirection to the payment page of Concardis PayEngine.

In order to be able to use this feature, you must first carry out the steps listed under [Hidden Authorisation / Alias Gateway](#) and create an API-User.

You can then activate the authorisation method 'Hidden Authorisation' for the payment methods of your choice. This procedure requires you as a merchant to fulfill the PCI-SAQ-A-EP. At no time is any credit card data saved on your server. Contact your Acquirer for more information about the SAQ and the requirements.

### 5.4 Credit Card

For the integration you have the choice between the pre-selection in the shop; i.e. the customer chooses the card type already in the shop; or a generic integration in which case the customer only sees the option 'credit card' as a payment method and then chooses the card type on the payment page Concardis PayEngine.



**Figure 5.1:** No pre-selection of the card type - the type will then be chosen on the payment page.

## Pre-Selection of the Payment Method

We recommend choosing the option pre-selection. This allows you to configure individual settings for each payment method and add payment fees to the various methods.

## 5.5 PayPal

You can process PayPal directly via Concardis PayEngine. In order to do so, however, some adjustments to your PayPal account are required. Please carry out the following steps:

1. Activate the payment module in your shop
2. Make sure that the payment method is activated in your Concardis PayEngine account
3. The API adjustments must be carried out in your PayPal account. The various steps are explained in the "PayPal Express Checkout Integration Guide". This document can be found in your PSP account under: Support > Integration and User Guides > Technical Guides > Concardis PayEngine PayPal Express Checkout Integration Guide .

## 5.6 MasterPass Integration: What to keep in mind

If you integrate MasterPass as a payment method in your shop, you have two integration options: External and Standard Checkout. When using External Checkout, the customer does not have to provide address data during checkout. The customer only needs a MasterPass account and the data will be transmitted by MasterPass. In order to use this option as a merchant, you have to activate this payment method with Concardis PayEngine.

Please keep in mind, that using additional functions such as address transmission through MasterPass, may require the activation of the respective options through Concardis PayEngine aktiviert.

In order to use MasterPass in compliance with the MasterCard guidelines, please read the following information carefully before using this payment method.

### 5.6.1 Integration Possibilities for MasterPass

MasterPass can be integrated as a normal payment method with redirection to Concardis PayEngine or as an external checkout.

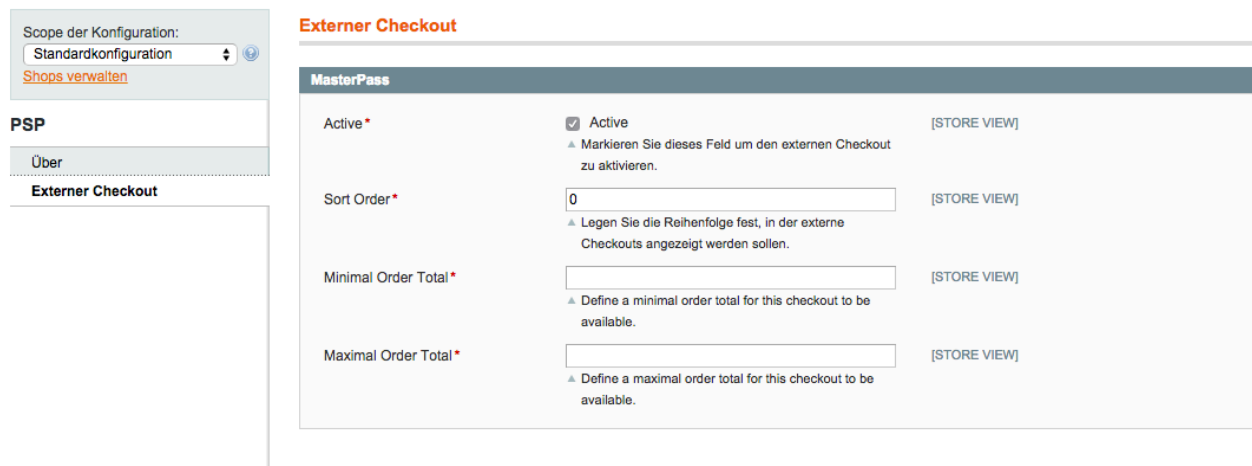
#### 5.6.1.1 MasterPass as a Payment Method

If you like to integrate MasterPass as a normal payment method, activate the payment method as usual (see [Configuration of the payment method](#)). In this scenario the customer will first be redirected to MasterPass and then to the wallet of the issuer.

#### 5.6.1.2 MasterPass as External Checkout

If you integrate MasterPass as an external Checkout, you can minimize the steps towards the payment radically. The address transfer and the creation of the account is processed via MasterPass. If you activate the external checkout, there appears a button in the basket with which you can jump after the login directly to the last step of the order confirmation. The creation of the account happens in the background.

For the activation of the external checkout go to **Concardis PayEngine** . There you'll find all settings for the external checkout:



**Figure 5.1:** Activation of the external checkout.

MasterPass as external checkout is not for all cases available. If this point in the manual doesn't appear, please make sure to contact us.

## 5.6.2 Checkout: MasterPass Learn More Button

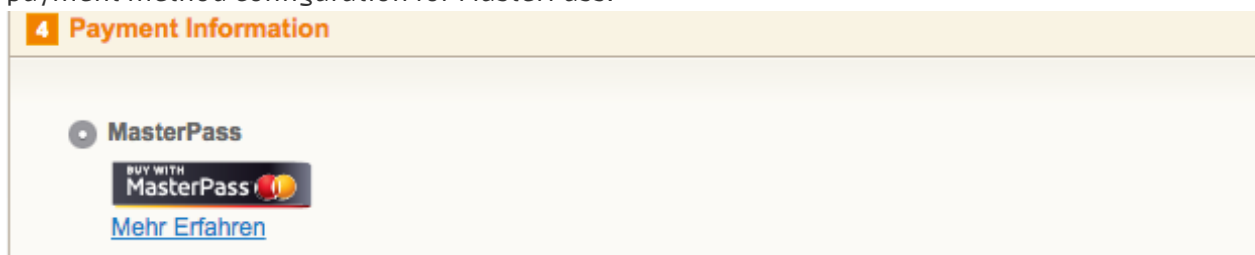
When using MasterPass as a payment method for standard checkout, it is mandatory to link to the MasterPass Learn More Page. In order to do this, navigate to [Payment Method Configuration](#). Paste the link for the Learn More Page into the field 'Description' for the respective languages. The field 'Learn More' will now be displayed when choosing a payment method.

We have already collected the most important links for you. You only have to copy and paste the links into the description field:

- German: [Mehr Erfahren](https://www.mastercard.com/mc_us/wallet/learnmore/de/DE/)
- French: [apprendre plus](https://www.mastercard.com/mc_us/wallet/learnmore/fr/FR/)
- English: [Learn More](https://www.mastercard.com/mc_us/wallet/learnmore/en/DE/)
- Spanish: [aprender más](https://www.mastercard.com/mc_us/wallet/learnmore/en/ES/)
- Italian: [saperne di più](https://www.mastercard.com/mc_us/wallet/learnmore/it/IT/)
- Dutch: [Leer Meer](https://www.mastercard.com/mc_us/wallet/learnmore/nl/NL/)

Aktiviert	<input type="text" value="Aktiviert"/>	[STORE VIEW]
	▲ Diese Zahlungsmethode aktivieren	
Titel	<input type="text" value="MasterPass"/>	[STORE VIEW]
	▲ Name der Zahlungsmethode	
Beschreibung	<pre>&lt;a href="https://www.mastercard.com/mc_us/wallet/learnmore/de/DE/" target="_blank"&gt;Mehr Erfahren&lt;/a&gt;</pre>	[STORE VIEW]
	▲ Beschreibung der Zahlungsmethode	

**Figure 5.1:** Example for entering a description (Magento). These settings are to be found in the payment method configuration for MasterPass.



**Figure 5.1:** The Learn More Page link should appear in the frontend.

Links for additional languages can be found in this document: [https://developer.mastercard.com/...](https://developer.mastercard.com/)

### 5.6.3 Additional information

General and additional information on using the MasterPass trademark and logo in your webshop are available in the official MasterPass Merchant Branding Requirement Document, which you can access here: [https://developer.mastercard.com/...](https://developer.mastercard.com/)

## 5.7 Usage of the Ajax Authorization (FlexCheckout)

You have the possibility of processing credit cards without redirection to the payment page of Concardis PayEngine.

In order to be able to use this feature, you must first carry out the steps listed under [Hidden Authorisation, FlexCheckout \(Hosted Tokenization Page\), External Checkout und Alias Manager](#) and create an API-User.

You can then activate the authorisation method 'Ajax Authorization (FlexCheckout)' for the payment methods of your choice. At no time is any credit card data saved on your server.



## 6 The Module in Action

Below you will find an overview over the most important features in the daily usage of the Concardis PayEngine module.

### 6.1 Useful Transaction Information on the Order

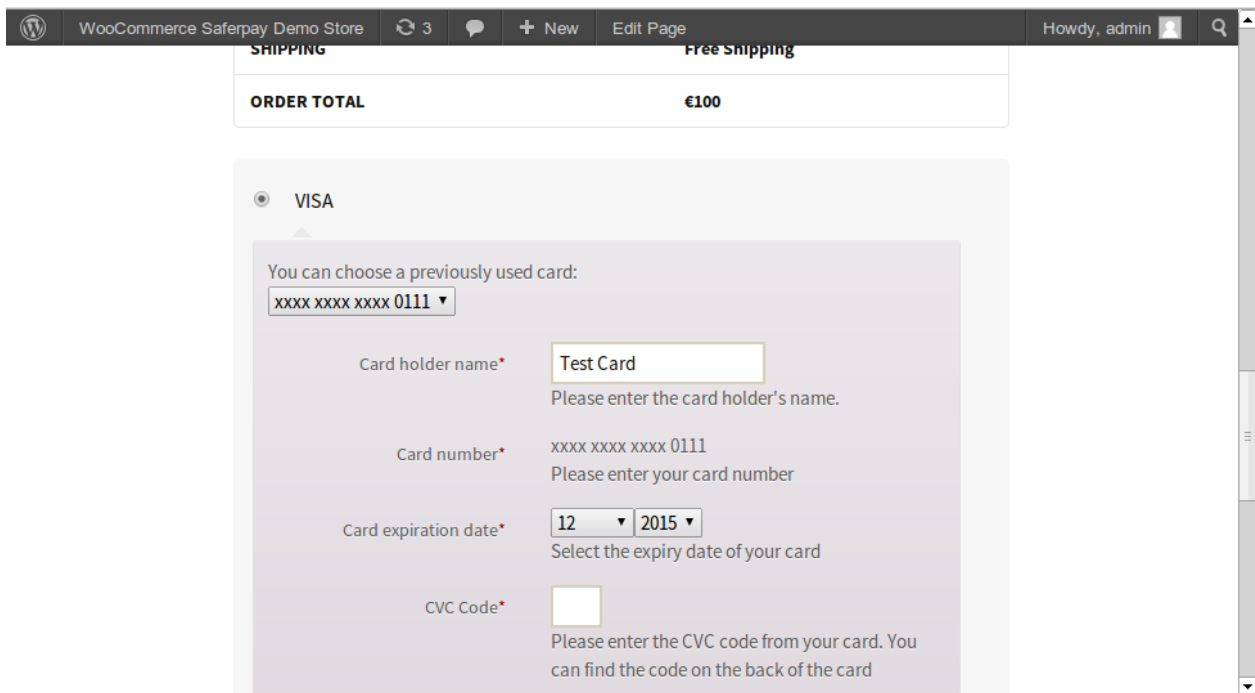
You can find an overview over all the most important information of a transaction in all orders that have been processed with our module. Among others, this information allows for the definite attribution of the orders to their corresponding transaction, seen in the back-end of Concardis PayEngine.

#	Transaction Number	Date	Payment method	Is authorised	Amount	Customer note	Add
8	26_8	2013-10-04 11:29:35	Saferpay Test Card	Yes	200.00		Less details
<b>Authorisation amount</b>		200.00					
<b>Currency</b>		EUR					
<b>Payment method</b>		Saferpay Test Card					
<b>Payment ID</b>		dzhzlbUOMIGAYWG618AIWKp5 MA					
<b>Captured amount</b>		200					
<b>Refunded amount</b>		200					
<b>Transaction authorised</b>		Yes					
<b>Transaction uncertain</b> ?		No					
<b>Transaction captured</b>		Yes					
<b>Transaction paid</b>		Yes					
<b>Alias</b>		xxxx xxxx xxxx 0111					
<b>Card number</b>		xxxx xxxx xxxx 0111					
<b>Card expiry date</b>		12/2015					
<b>Card Type</b>		Saferpay Test Card					
<b>3D Secure</b>		Successful					
<b>Captures</b>							

Figure 6.1: Transaction Information in WooCommerce.

### 6.2 Usage of the Alias Managers / Token Solution

With the Alias Manager, your customers can securely save their credit cards with Concardis PayEngine for later purchases. You can enable this by activating the option "Alias Manager" in the configuration of the [Payment Method](#). The customer can then choose from his or her saved credit cards without having to re-enter all the details.



**Figure 6.1:** Alias Manager in WooCommerce

## Alias Manager Options

The usage of the Alias Managers requires the activation of the correct option with Concardis PayEngine. To do so, please contact the support directly.

## 6.3 Dynamic Template

We provide a standard skin for the usage of the dynamic template for all sellxed modules. You can activate the option by setting the option "Dynamic Template" to "Use Shop Template" in the main module. Please make sure that all settings specified under [Template](#) have been carried out in the back-end of Concardis PayEngine.

The Dynamic Template allows you to load the Payment Page of Concardis PayEngine in the layout of your shop. The customer, therefore, does not notice that he or she has been forwarded to the website of Concardis PayEngine. The template dynamically adjusts to your shop template. This, furthermore, allows you to easily integrate Mobile Skins (cf. Screenshots).

## The Dynamic Template requires an SSL Certificate

In order for the Dynamic Template to work correctly with all browsers, you require an SSL certificate in your shop.

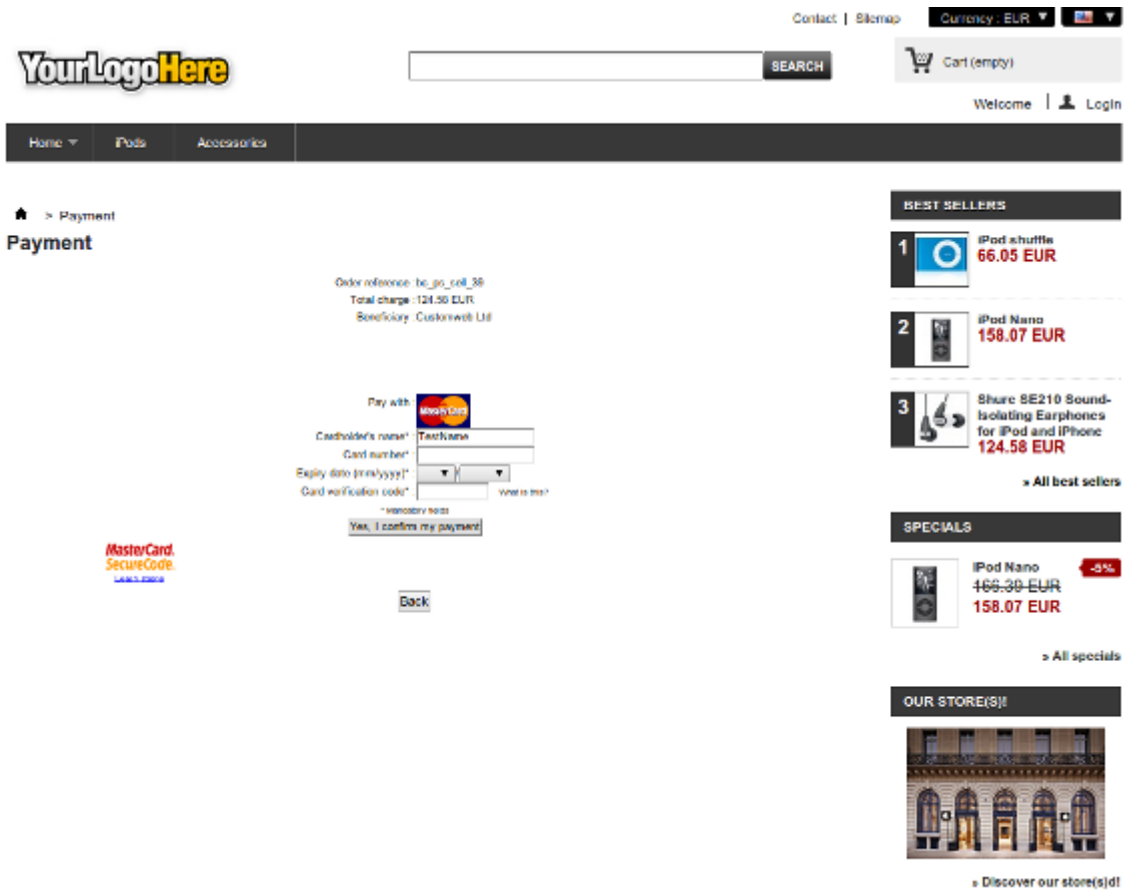


Figure 6.1: Example: The skin adapts to the layout of your shop.

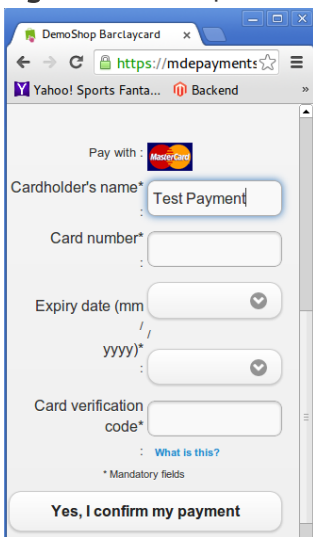


Figure 6.1: Example: Dynamic Template with mobile skin

## 6.4 Capturing of Orders

### Please note

The transaction management between your shop and Concardis PayEngine is not synchronized. If you capture payments with Concardis PayEngine, the status in the shop will not be updated and a second capturing in the shop is not possible.

In order to be able to capture orders you must make sure that you have set the option 'Capturing' to 'deferred' in the [payment method configuration](#).

Open the Order and look for the Concardis PayEngine transaction tab at the bottom. Capturing via the internal operation of WooCommerce is not supported.

Customweb Transactions

#	Transaction Number	Date	Payment Method	Authorised	Amount
6	16	2017-01-06 10:23:49	MasterCard	Yes	10.00

[Less Details](#)

Authorisation Amount	10	Currency	CHF
Payment Method	MasterCard	Payment ID	4S2Wtjb3E7d7tASKGxK1bCEWxhdA
Test Transaction	Yes	Transaction authorised	Yes
Transaction uncertain	No	Transaction paid	Yes
Payment Method Name	MasterCard	Payment Details	xxxx xxxx xxxx 0000
Card holder name	Customweb	Card Expiry Date	12 / 20
Card Country Origin	DE	Acquirer Reference	000000
3ds Authentication	Yes	3ds Liability Shift	Yes
Authorisation Method	PaymentPage		

Previous actions

Date	Action	Message
2017-01-06 10:24:21	authorization	The amount of 10.00 is authorized.

**Figure 6.1:** Transactiondetails in the transaction tab of a specific order.

Click on "More Details" to view the transaction details. By clicking **Capture** Button, you get into the following context.

Name	SKU	Type	Tax	Quantity	Total Amount (excl. Tax)	Total Amount (incl. Tax)
Testproduct	Testproduct	product	0 %	1	10.00	10.00
Total captured amount:						10.00CHF
<input type="button" value="Back"/> <span style="float: right;"><input type="button" value="Capturing"/></span>						

**Figure 6.1:** Deferred/Manual capture of transactions within WooCommerce

Enter the amount of your choice that you wish to capture from the customer's card. By clicking **Capture** a direct capturing of the order occurs with Concardis PayEngine.

Please be aware that cancelling the transaction does not cause a status change of the order.

## 6.5 Refunds

You can refund already captured transactions and automatically transmit them to Concardis PayEngine.

### Please note

That the default WooCommerce functionality is not supported by our plugin.

#### Customweb Transactions

#	Transaction Number	Date	Payment Method	Authorised	Amount
4	13	2016-11-04 14:50:07	MasterCard	Yes	20.00
<a href="#">Less Details</a>					
Authorisation Amount	20	Currency	EUR		
Payment Method	MasterCard	Payment ID	b3YMh8bj8d4pvAnj0ddGAGvj3t9A		
Captured amount	20	Test Transaction	Yes		
Transaction authorised	Yes	Transaction uncertain	No		
Transaction captured	Yes	Transaction paid	Yes		
Payment Method Name	MasterCard	Payment Details	xxxx xxxx xxxx 0000		
Card holder name	Customweb	Card Expiry Date	12 / 20		
Card Country Origin	DE	Acquirer Reference	000000		
3ds Authentication	Yes	3ds Liability Shift	Yes		
Authorisation Method	PaymentPage				
<a href="#">Refund</a>					
<b>Captures</b>					
Date		Amount		State	
2016-11-04 14:51:34		20		succeed	
<b>Previous actions</b>					
Date	Action	Message			
2016-11-04 14:51:33	authorization	The amount of 20.00 is authorized.			
2016-11-04 14:51:34	capturing	The amount of 20.00 is captured.			

**Figure 6.1:** Transactionsdetails via Orders > Concardis PayEngine Transactions.

Open the order and then click on the small magnifying glass in den transaction information overview. By clicking **Refund** Button, you get into the following context.

Name	SKU	Type	Tax	Quantity	Total Amount (excl. Tax)	Total Amount (incl. Tax)
Testproduct	Testproduct	product	0 %	2	20.00	20.00

Total refunded amount: 20.00CHF

Close transaction for further refunds

**Figure 6.1:** Refund of transactions within WooCommerce

Just like for the capturing, you open the order and click on the magnifying glass next to the order of your choice. Enter any refund amount of your choice in the field provided for this purpose. By clicking **refund** the refund request will directly be sent to Concardis PayEngine and the specified amount will be credited on the customer's credit card.

Please note that you can't refund more than 100% of the original amount.

Furthermore, please be aware that processing a refund will not cause a status change of the order.

## 6.6 Transaction Process

Each action affiliated with transaction management is logged by the module.

The screenshot displays the transaction process overview in a web browser. At the top, the browser address bar shows 'WooCommerce Saferpay Demo Store'. The main content area is divided into several sections:

- Transaction Log:** A table showing a single transaction on 2013-11-28 at 14:07:56 with an amount of 100.
- Refund transaction:** A section with an 'Amount to refund' input field containing '100' and a 'Maximal refundable amount' of '100'. There is a checkbox for 'Close transaction for further refunds' and a 'Refund' button.
- Previous Actions:** A table with columns 'Date', 'Action', and 'Message'. It contains two rows:
 

Date	Action	Message
2013-11-28 13:55:25	authorization	The amount of 100.00 is authorized.
2013-11-28 14:07:56	capturing	The amount of 100.00 is captured.
- Downloadable Product Permissions [?]:** A section with a dropdown menu labeled 'Choose a downloadable product...' and a 'Grant Access' button.

**Figure 6.1:** Transactions in the Overview of the Transaction Process

## 6.7 Set-up a cron job to activate the timed operations

To activate the timed operations of the plugin (e.g. update service, deleting pending orders, etc.) make sure that you set up the WooCommerce Cron engine. Especially the update function allows you to automatically retrieve additional information or changes of your order directly via the API of Concardis PayEngine. Please note it could be that in order to use the update feature it may be necessary that Concardis PayEngine activates additional options in your account.

The module uses the standard cron engine of WooCommerce. More information regarding the set up can be found [here](#).

## 7 Testing

Before switching from test to live mode it is important that you test the module extensively.

### Testing

Do not forget to switch the operating mode from test to live after having successfully tested the module.

### 7.1 Test Data

In the following section you can find the test data for the various payment methods:

#### Credit / Debit Card

Card number	3750 0000 000 0007	American Express
Expiry Date	12/2020	
CVC	1234	
Card number	5399 9999 9999 9999	Mastercard
Expiry Date	12/2020	
CVC	123	
Card number	4111 1111 1111 1111	VISA (Without 3-D Secure Check)
Expiry Date	12/2020	
CVC	123	
Card number	4000 0000 0000 0002	VISA (With 3-D Secure Check)
Expiry Date	12/2020	
CVC	123	

#### American Express

Card number	3750 0000 000 0007	American Express
Expiry Date	12/2020	
CVC	1234	

#### MasterCard

Card number	5399 9999 9999 9999	Mastercard
Expiry Date	12/2020	
CVC	123	

#### Visa

Card number	4000 0000 0000 0002	VISA (With 3-D Secure Check)
Expiry Date	12/2020	
CVC	123	
Card number	4111 1111 1111 1111	VISA (Without 3-D Secure Check)
Expiry Date	12/2020	
CVC	123	



## 8 Errors and their Solutions

You can find detailed information under <http://www.sellxed.com/en/fag>. Should you not be able to solve your problem with the provided information, please contact us directly under: <http://www.sellxed.com/en/support>

### 8.1 Page Not Found Error prior to the redirection to Payment Page

If you are using WPML it can occur that the Pages for the display of the payment methods or for the redirection to Concardis PayEngine end in a Page Not Found Error.

In this case you have to duplicate our Pages in the corresponding languages. In order to do so please follow these steps:

1. Go to the main menu and select **Pages > All Pages**. There you should find a Page called Concardis PayEngine Checkout.
2. Open the configurations.
3. On the right hand side under languages you can now duplicate the content of this page for all of your installed languages. When you have successfully saved the changes this page will be active for all of your languages and the Error should have disappeared.

### 8.2 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the Concardis PayEngine Referrer URL might appear in your Analytics Tool thus hiding the original traffic source. However, most Analytic Tools are able to minimize this problem.

In case you are using Google Analytics as reporting tool, this step by step guide may help you to exclude the URLs: [under bullet point 4](#).

## 9 Compatibility with Third-Party Plugins

The plugins listed below are compatible with our payment modules and allow you to handle certain tasks in a easier way.

### 9.1 Fee's and discount's within WooCommerce

To configure a Concardis PayEngine payment gateways based fee and discount you will need the following 3rd-Party plugin.

- [Checkout Fees for WooCommerce](#)

### 9.2 Multilingual WooCommerce sites

To run multilingual WooCommerce sites you will need the following 3rd-Party plugin.

- [WPML for WooCommerce](#)

### 9.3 Subscriptions within WooCommerce

To allow subscription payments in WooCommerce you will need the following 3rd-Party plugin.

#### Supported Paymentmethods

Please make sure that the Concardis PayEngine payment gateway supports the subscription feature for the specific payment methods.

- [WooCommerce Subscription](#)

### 9.4 Birthday and gender in WooCommerce

For certain payment service providers it is necessary to check the birthday an the gender of a customer. WooCommerce does not check this by default.

#### How to enable gender and birthday checks in your shops checkout

1. Either add custom checkout field yourself or download [Flexible Checkout Fields](#) to do so.
2. Modify the order context getters to return the value of your custom checkout field from the order / session (or wherever the previous step saves the data).

Order Context Getters

- AbstractOrderContext
- getBillingDateOfBirth()
- getBillingGender()

These functions can be found in "wp-plugins/woocommerce\_payenginecw/classes/PayEngineCw/AbstractOrderContext.php".

## 10 Error Logging

The module will log different unexpected errors or information depending on the configured level. If there is any issue with the module, this log can help identify the cause.

### 10.1 Log Levels

You can configure the log level in the Concardis PayEngine settings.

- Error: Logs unexpected errors only. (Default)
- Info: Logs extended information.
- Debug: Logs information helpful for debugging.

### 10.2 Log Location

The log file is stored in **wp-content/uploads/wc-logs**. Please make sure the path exists and it is writable by the webserver.

## 11 Advanced Information

This section of the manual is for advanced usage of the module. The content is for advanced users with special requirements. Everything in this section is optional and not required for the daily usage of the module.

### 11.1 Transaction Object

This section describes how to extract information from a transaction, if you need it for further processing. E.g. You require more information of the transaction for further processing an order in your erp system.

The code snippets in this section assume your script resides in the root folder of the shop with the default shop folder structure.

Have Wordpress initialized in your script, this is required for the database connection.

```
require_once( dirname(__FILE__) . '/wp-load.php' );
```

Include the modules Util class.

```
require_once ABSPATH.'wp-content/plugins/woocommerce_payenginecw/classes/PayEngineCw/Util.php';
```

Now you can load the transaction and then extract the transactionObject.

Load the transaction by Id:

```
$transactionById = PayEngineCw_Util::getTransactionById($transactionId);
$transactionObject = $transactionById->getTransactionObject();
```

Load the transaction by the external Id:

```
$transactionByExternal = PayEngineCw_Util::
getTransactionByTransactionNumber($externalId);
$transactionObject = $transactionByExternal->getTransactionObject();
```

Load transactions by Post ID, this is the internal WooCommerce order id:

```
$transactionsByPostId = PayEngineCw_Util::getTransactionsByPostId
($orderId);
foreach($transactionsByPostId as $transaction){
    $transactionObject = $transaction->getTransactionObject();
    //Do something with each object
}
```