

wallee Magento 2.3

Documentation

[Sign Up](#)

[Source](#)

Prerequisites

If you don't already have one, create a [wallee](#) account.

Installation

1. Update the composer.json file in the root directory of your Magento store and wait for Composer to finish updating the dependencies.

```
composer require wallee/magento-2-3
```

2. Enable the extension and clear the static view files.

```
bin/magento module:enable Wallee_Payment --clear-static-content
```

3. Register the extension and initiate the database migrations.

```
bin/magento setup:upgrade
```

4. Recompile the Magento project.

```
bin/magento setup:di:compile
```

5. Clear the Magento store's cache.

```
bin/magento cache:flush
```

Configuration

1. Navigate to Stores → Configuration → Sales → wallee Payment in your Magento backend and in the section *General* enter the wallee User ID and Authentication Key that you can create in the [setup assistant](#). Alternatively, you can manually create an [application user](#).

Configuration

Store View: Default Config

Save Config

GENERAL

CATALOG

CUSTOMERS

SALES

Sales

Sales Emails

PDF Print-outs

Tax

Checkout

Information

General

User Id [global]

The Application User needs to have full permissions in all spaces this shop is linked to.

Authentication Key [global]

Email

Document

Line Items

2. You need to switch the configuration scope to **Main Website** to enter the space id.

Configuration

Store View: Main Website

Save Config

GENERAL

CATALOG

CUSTOMERS

SALES

Sales

Sales Emails

PDF Print-outs

Tax

Information

General

Space Id [website]

Space View Id [store view]

Email

Document

Line Items

3. After saving the configuration, the payment methods are created in the Magento store and the necessary webhooks are set up.

The setup is now finished. You should see the payment methods in your checkout. To view the payment method configuration in the backend of Magento go to Stores → Configuration → Payment Methods. Make sure you are in the **Website** configuration scope to view the payment methods.

Most of the payment method configuration is done in wallee. After following the steps of the previous steps, the wallee payment method configurations will be synchronized automatically into the Magento store. There are just a few payment method settings in the Magento store in Stores → Configuration → Sales → Payment Methods.

Configuration 🔍 🔔 👤 admin ▾

Store View: Default Config ▾ Save Config

- [Dashboard](#)
- [Sales](#)
- [Catalog](#)
- [Customers](#)
- [Marketing](#)
- [Content](#)
- [Reports](#)
- [Stores](#)
- [System](#)
- [Find Partners & Extensions](#)

GENERAL ▾

CATALOG ▾

CUSTOMERS ▾

SALES ▾

- Sales
- Sales Emails
- PDF Print-outs
- Tax
- Checkout
- Shipping Settings
- Multishipping Settings
- Shipping Methods
- Google API
- Payment Methods

Merchant Location ⊞

Merchant Country [website]

If not specified, Default Country from General Config will be used

Other Payment Methods: ⊞

⊞ wallee Payment - Credit / Debit Card

Space Id <small>[store view]</small>	1	
Enabled <small>[website]</small>	<input type="text" value="Yes"/>	<input checked="" type="checkbox"/> Use system value
Title <small>[store view]</small>	<input type="text" value="Credit / Debit Card"/>	<input type="checkbox"/> Use system value
Description <small>[store view]</small>	<input type="text" value="Pay conveniently with your credit or debit ca"/>	<input type="checkbox"/> Use system value
Show Description <small>[store view]</small>	<input type="text" value="Yes"/>	<input checked="" type="checkbox"/> Use system value
<small>Show the payment method's description on the checkout page.</small>		
Show Image <small>[store view]</small>	<input type="text" value="Yes"/>	<input checked="" type="checkbox"/> Use system value
<small>Show the payment method's image on the checkout page.</small>		
Sort Order <small>[website]</small>	<input type="text" value="1"/>	<input checked="" type="checkbox"/> Use system value

Payment Method Configuration

Setup

The wallee payment method configurations are synchronized automatically into the Magento store. There are just a few payment method settings in the Magento store in Stores → Configuration → Sales → Payment Methods. To see the wallee payment methods, you need to switch the configuration scope to **Website**

Additional payment methods are directly added in wallee. This can be done in the [setup assistant](#). Changes are synchronized automatically.

Customization

If you want to change the payment method description, title, logo, etc you need to do this in the [payment method configuration](#). Changes will be synchronized automatically.

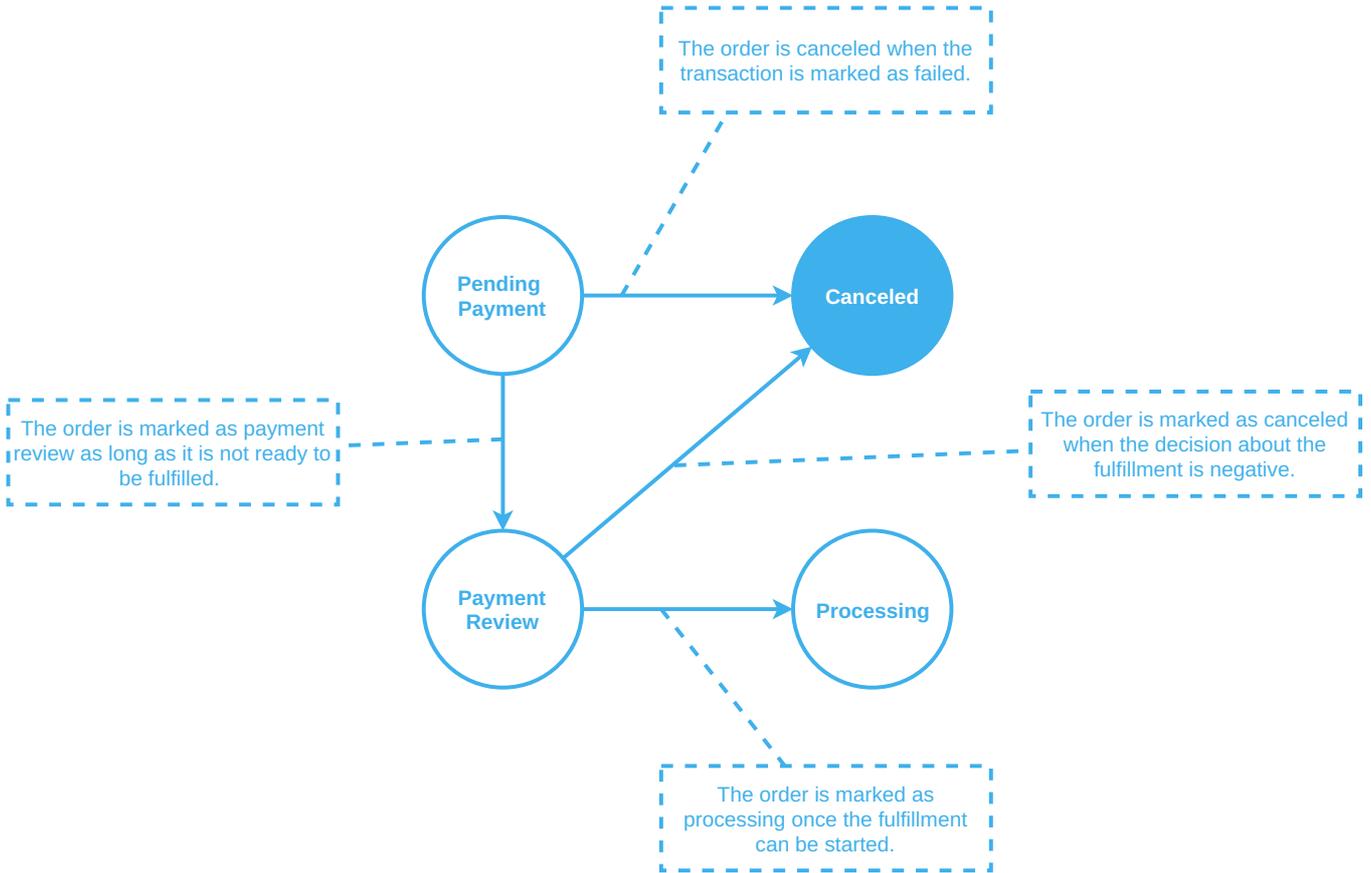
State Graph

The Payment Process of wallee is **completely standardized for every payment method** you can process. This gives you the ability to simply add a payment method or processor without changes inside of your Magento configuration. An overview about the states and the payment processes of wallee can be found in the [Payment Documentation](#).

In the following section we provide you an overview about how the wallee states are mapped into the Magento State graph for orders and invoices.

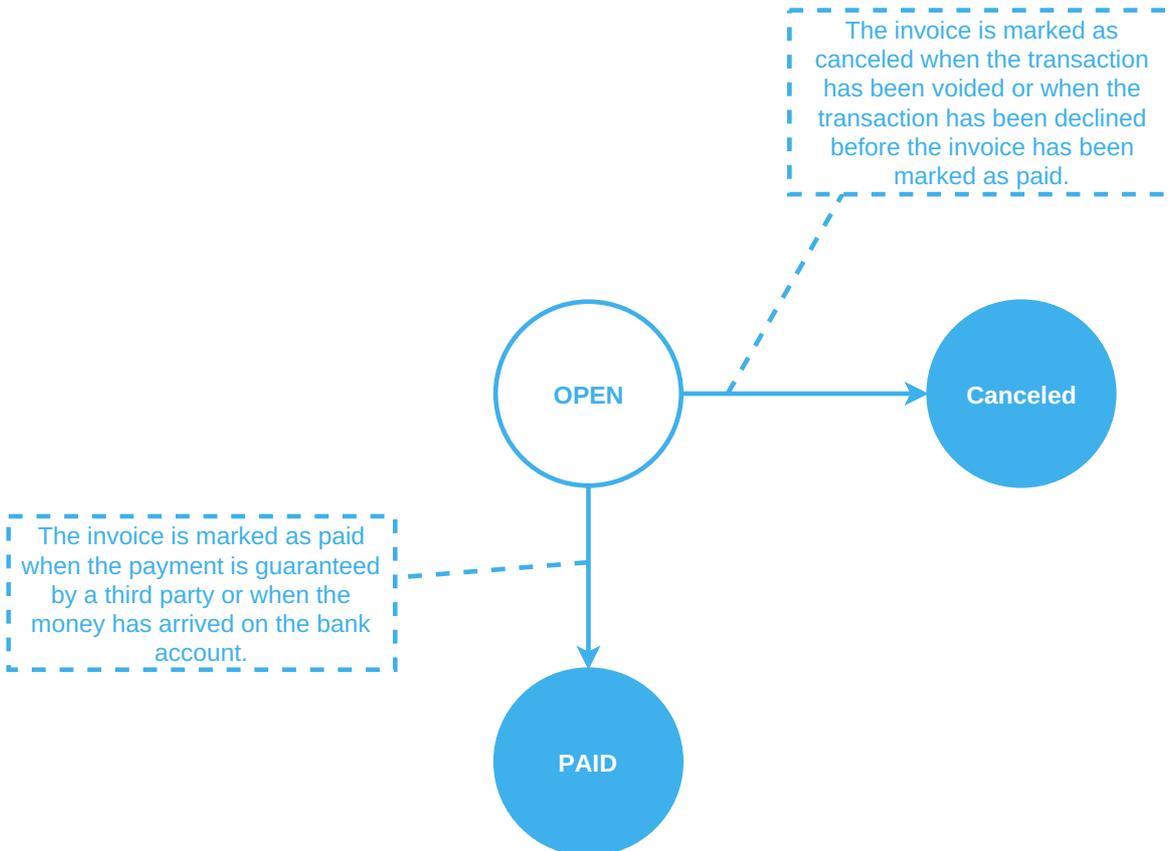
State Mapping Of Magento Orders

Below you find a diagram that shows the state machine of Magento for orders including additional information for the state transitions.



State Mapping of Magento Invoices

Below you find a diagram that shows the state machine of Magento for Invoices including additional information for the state transitions.



Transaction Management

You can capture, cancel and refund transactions directly from within the Magento backend. Please note if you refund, void or capture transaction inside wallee the events will be synchronized into Magento. However, there are some limitations (see below).

Complete (capture) an order

You have the possibility for your transactions to have the invoice created and the payment only authorized after the order is placed. Inside the [connector configuration](#) you have the option, if the payment method supports it, to define whether the payment should be completed immediately or deferred.

In order to capture a transaction, open the invoice and click on capture.

When the completion is pending in wallee the invoice will stay in pending state.

#000000007

🔍 🔔 👤 admin ▾

← Back Cancel Send Email **Capture** Print

Order & Account Information

Order # 000000007 (The order confirmation email was sent)

Order Date	Aug 15, 2018, 10:33:18 AM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	172.31.34.173

Account Information

Customer Name	Guest
Email	spam@customweb.com
Customer Group	NOT LOGGED IN

Void a Transaction

In order to void a transaction, open the invoice and click on the cancel button. This will cancel the invoice and void the transaction.

You can only void transactions that are not yet completed.

#000000007

← Back **Cancel** Send Email Capture Print



Order & Account Information

Order # 000000007 (The order confirmation email was sent)

Order Date	Aug 15, 2018, 10:33:18 AM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	172.31.34.173

Account Information

Customer Name	Guest
Email	spam@customweb.com
Customer Group	NOT LOGGED IN

Refund of a Transaction

You have the possibility to refund already completed transactions. In order to do so, open the invoice of the captured order and click on **Credit Memo**. In case the payment method does not support refund, you will not see the possibility to issue online refunds.

#000000005

← Back Send Email **Credit Memo** Void Print



Order & Account Information

Order # 000000005 (The order confirmation email was sent)

Order Date	Aug 15, 2018, 10:18:38 AM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	172.31.11.189

Account Information [Edit Customer](#)

Customer Name	Guest
Email	spam@customweb.com
Customer Group	NOT LOGGED IN

You can make refunds based on product quantity. In order to do so, enter the amount of products you wish to refund to your customer.

Order Total

Credit Memo Comments

Comment Text

Refund Totals

Subtotal	CHF45.00
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	CHF50.00

[Update Totals](#)

- Append Comments
- Email Copy of Credit Memo

[Refund Offline](#)[Refund](#)

You can carry out as many individual refunds as you wish until you have reached the quantity of the original order. The status of the order then automatically switches to complete.

It can take some time until you see the refund in Magento. Refunds will only be visible once they have been processed successfully.

On Hold Orders

As long as the delivery should not be done the state of the order will be in On Hold. This happens when the transaction in wallee has not reached the fulfill state.

There are essentially two reasons why this can happen:

- The transaction is not completed. In this case you have to complete the transaction as written above.
- As long as we are not able to tell you if you should fulfill the order. The delivery decision is done automatically. If this does not happen within the defined time frame, wallee will generate a manual task which you should observe and follow the instructions. When there is a manual task we will also display it in the Magento Backend.

You can find more information about manual tasks in our [Manual Task Documentation](#).

Limitations of the Synchronization between wallee and Magento

Please note that captures, voids and refunds done in wallee are synchronized. However, there are some limitations. Inside wallee you are able to change the **unit price** and the **quantity** at once. This can not be done in the Magento backend. We therefore recommend that you perform the refunds always inside the Magento backend and not inside wallee. If a refund cannot be synchronized it will be sent to the processor but it could be that you do not see it inside your Magento backend.

You can find more information about Refunds in wallee in our [Refund Documentation](#).

Tokenization

In case the payment method supports tokenization you can store the payment details of your customer for future purchases. In order to use this feature make sure that the **One-Click-Payment Mode** in your [payment method configuration](#) is set to allow or force storage.

Tokenization is not available for guest checkouts.

Backend Orders

You can create orders inside Magento also from the Magento Backend. If you create the transaction from the backend and select a payment method created by wallee then we are using the [Charge Flow](#) Feature of wallee. This means that we first check if the payment method allows to charge the customer without customer interaction (i. e. invoice). If not and you did not select from the dropdown to use a token with stored payment information we are going to trigger the [charge flow process](#) you configured to ask the buyer for the payment details.

Create New Order for test test in Default Store View

🔍 🔔 👤 admin ▾

Cancel

Submit Order

Order Currency:
Swiss Franc ▾

Customer's Activities

🔄 Products in Comparison List (0)
No items

🔄 Recently Compared Products (0)
No items

🔄 Recently Viewed Products (0)
No items

Update Changes

Items Ordered

Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Erika Running Short-32-Green SKU: WSH12-32-Green	CHF45.00 <input type="checkbox"/> Custom Price*	1	CHF45.00	CHF0.00 <input checked="" type="checkbox"/> Apply	CHF45.00	Please select ▾
Total 1 product(s)	Subtotal:		CHF45.00	CHF0.00	CHF45.00	

* - Enter custom price excluding tax

Payment & Shipping Information

Payment Method

- Check / Money order
- Direct Debit (SEPA)
- Invoice
- Credit / Debit Card

A charge flow will be used to process the payment.

* Token:

✓ XXXX XXXX XXXX 0007 (2021/8)

The customer can be charged by using an existing token. If left empty, no token is used.

Shipping Method *

[Get shipping methods and rates](#)

You can find more information about charge flows in our [charge flow documentation](#).

FAQ

How can I make the payment methods appear in the checkout?

Make sure that you followed the [Configuration](#) section by stating your wallee space ID and application user's access information in the Magento backend. By saving the configuration form the synchronization of the payment methods and the set up of the webhooks are initiated.

If this does not solve the problem, it could be that you use a special fee or coupon module that we do not support. Try to disable this plugin and see if it helps. The payment methods are only displayed if the plugin's total calculation matches the actual order total.

Support

If you need help, feel free to contact our [support](#).