

# **Primer <> Magento User Guide**



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# Introduction

Primer is the world's first automation platform for payments. With a completely unified checkout and payments integration, Primer lets merchants truly consolidate their payments stack, plus add APIs and tools from across the web to build dynamic end-to-end payment flows.

# **Supported versions**

- Magento 2.2.x, 2.3.x and 2.4.x Commerce (formerly Enterprise)
- Magento 2.2.x, 2.3.x and 2.4.x Opensource (formerly Community)

#### Access

In order to get started, you'll need both Primer and Magento accounts:

• Create a Magento website

Sign up for a <u>Primer account</u>

## **Magento software**

This guide assumes that you already have the Magento software installed and uploaded to your server. For Magento's system requirements, refer to the Magento documentation.

# **HTTPS** configuration

Primer requires a secure connection to process payments. You must ensure that your domain is SSL certified and SSL is enabled for Magento.



## Get started

## **Configure your Primer account settings**

Before you install the Primer extension in Magento, complete these steps in your Primer account for **Sandbox** and **Production**.

 You'll need your Primer API credentials and define IP addresses for your production server which is used for API calls.

## **Upload and install the extension**



The Primer extension is available **free from Magento** 

- 1. Download the Primer extension file to your local machine
- 2. In the app/code directory of your Magento installation, create a Primer directory and create a <a href="#">/Payment</a> directory in the <a href="#">/Primer</a> directory
- 3. Upload the Primer extension file to the .../app/code/Primer/Payment directory you just created
  - You can use an FTP client such as FileZilla, or an SSH client such as **Putty**, using your server permissions
- 4. Extract the file by running the following command from the command line on your server, replacing file\_name with the name of the file:

```
tar xzvf file_name.zip --strip 1
```

5. For Magento to recognise the Primer extension run following command from **root folder** 

```
bin/magento module:enable Primer_Payment,
```

6. Then you must run the following upgrade command from the **root folder** 

bin/magento setup:upgrade



If you have difficulty running the above commands, ensure bin/magento has execute permissions.

7. If you are **not** running your Magento installation in **compiled** mode, skip to step 7.

If you are running in **compiled** mode, complete this step:

 Recompile the Magento code by typing the following command from the root folder:

bin/magento setup:di:compile

- 8. To generate **static content** in **production** mode, complete this step:
  - Run the following command from the **root** folder of your Magento installation, replacing the locales at the end with what is appropriate for your store.

bin/magento setup:static-content:deploy en\_GB en\_US

• To see the full list of <a href="ISO-636">ISO-636</a> language codes, run:

magento info:language:list.

If you have Magento **caching** enabled, log in to your Magento store as an admin

Navigate to System > Cache Management, and click Flush Magento Cache

# **Configure the Primer extension**



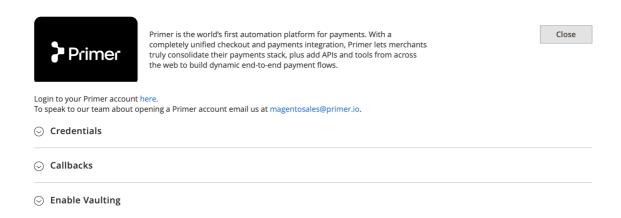
To configure the Primer Extension ensure you are logged in as an admin

- Go to Stores > Configuration > Sales > Payment Methods
- Scroll down to find 'Primer' and click configure button



There are the following configuration options available:

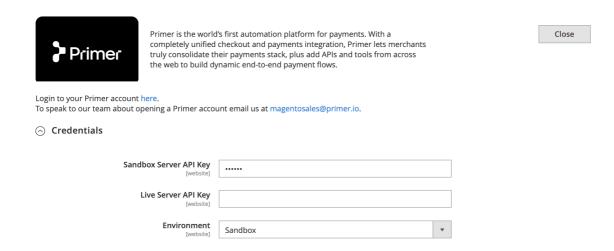
- Credentials
- Callbacks
- Enable Vaulting



#### **Enter your Credentials**

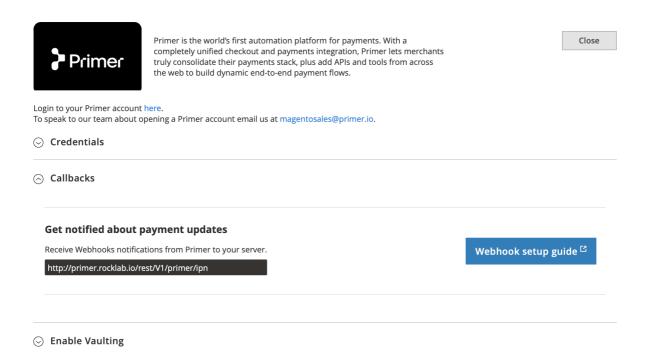
- Enter your Primer API credentials for both Sandbox and Live
- Environment allows you to switch between environments

Configure



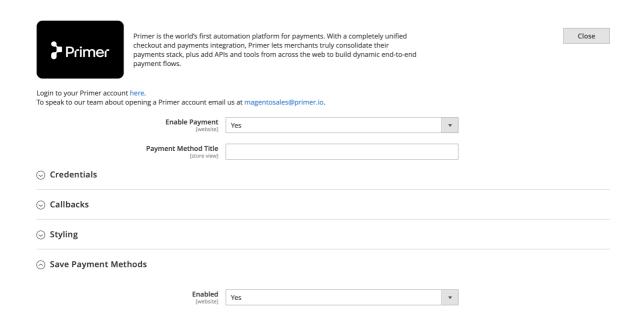
#### **Configure Callbacks**

- Magento will need to receive Webhooks notifications from Primer to your server for payment updates
- Add a Webhook for <a href="http://primer.rocklab.io/rest/V1/primer/ipn">http://primer.rocklab.io/rest/V1/primer/ipn</a> in the Developers section in the Primer dashboard.



#### **Enable Vaulting**

- This configuration allows to leverage Primer's secure PCI vault and allow customers to store payment methods for recurring use and faster checkout.
  - In addition to this customers are allow to manage their stored payment details in the 'My account' section of the Magento store.



# **Manual capture**

To manually capture a payment that is in the Authorized status, you can follow the steps below:

- 1. Login to your Magento store as an Admin user
- 2. Navigate to sales > Orders
- 3. Click view next to the relevant order
- 4. On the top menu bar, click <u>Invoice</u> and scroll to the bottom of the page, from the drop-down list, select <u>Capture Online</u> from this list.