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User Manual

**Wallee POS Payment Terminal Plugin for Odoo v18.0**

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## Table of Contents

1. Introduction.....	3
2. Features.....	4
3. Working.....	5
4. Technical Requirements / Compatible With: .....	21
5. Change Log / Release Notes .....	21
6. Support.....	21

## 1. Introduction

The POS Wallee Payment Acquirer Plugin from PIT Solutions offers a seamless and efficient solution for Odoo POS merchants in Europe and Switzerland. By automating the payment process, this plugin eliminates the need for manual payment entry, reducing checkout times and minimizing human errors.

Traditionally, Odoo POS merchants faced the challenge of manually entering payment amounts into their payment terminals. This time-consuming and error-prone process often led to longer checkout times and difficulties in reconciling orders.

The Wallee POS Payment Terminal Plugin addresses these issues by:

- **Automating Payment Processing:** Eliminating manual data entry and reducing the risk of human errors.
- **Streamlining the Checkout Process:** Providing a faster and more efficient payment experience for both merchants and customers.
- **Enhancing Accuracy:** Ensuring that payment amounts are accurately transferred from the Odoo POS to the Wallee payment terminal.
- **Increasing Efficiency:** Optimizing the checkout process and reducing operational costs.
- **Enhancing Customer Satisfaction:** Delivering a faster and more convenient payment experience.
- **Ensuring Compliance:** Benefiting from Wallee's adherence to industry security standards.

## 2. Features

- **Reduced Checkout Time**
  - **Faster Payments:** Streamline the payment process, reducing wait times for customers.
  - **Improved Customer Satisfaction:** Provide a more efficient and enjoyable shopping experience.
- **Easy Integration**
  - **Seamless Integration:** Effortlessly integrate the plugin into your Odoo POS system.
  - **Minimal Setup:** Get up and running quickly with minimal configuration.
- **Enhanced Security**
  - **Secure Transactions:** Benefit from Wallee's robust security measures to protect customer data.
  - **Compliance:** Adhere to industry standards for payment security.
- **Improved Accuracy**
  - **Eliminate Errors:** Prevent manual data entry mistakes and ensure accurate payment processing.
  - **Streamline Reconciliation:** Simplify the reconciliation process with accurate transaction data.
- **Additional Enhancements**
  - Implemented Wallee Payment Python Library.
  - Implemented refunds for all POS orders.
- **Supported Payment Connectors**
  - American Express, Dankort, Diners Club, Mastercard, Visa.

### 3. Working

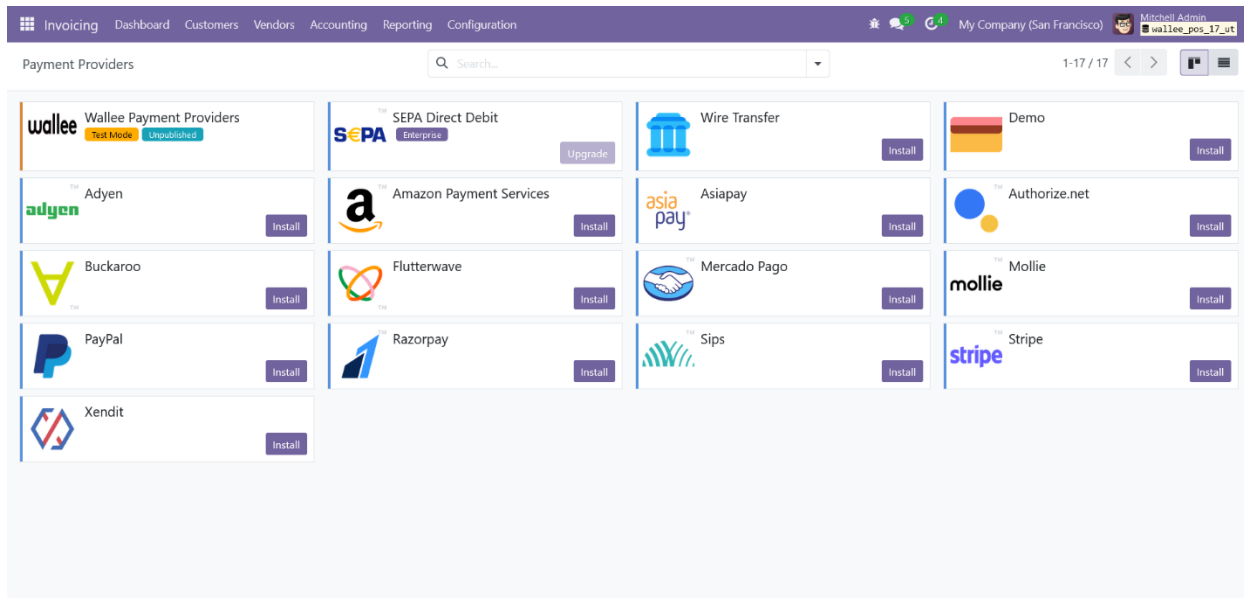
The POS Wallee Payment Acquirer Plugin establishes a connection between Odoo POS users and the Wallee payment gateway via a payment terminal. This integration uses REST APIs to enable seamless communication and data exchange between the plugin and the Wallee payment platform.

#### *Screenshot 1: Payment Providers Listed in Odoo Backend*

You can access the payment providers through the following menu option:

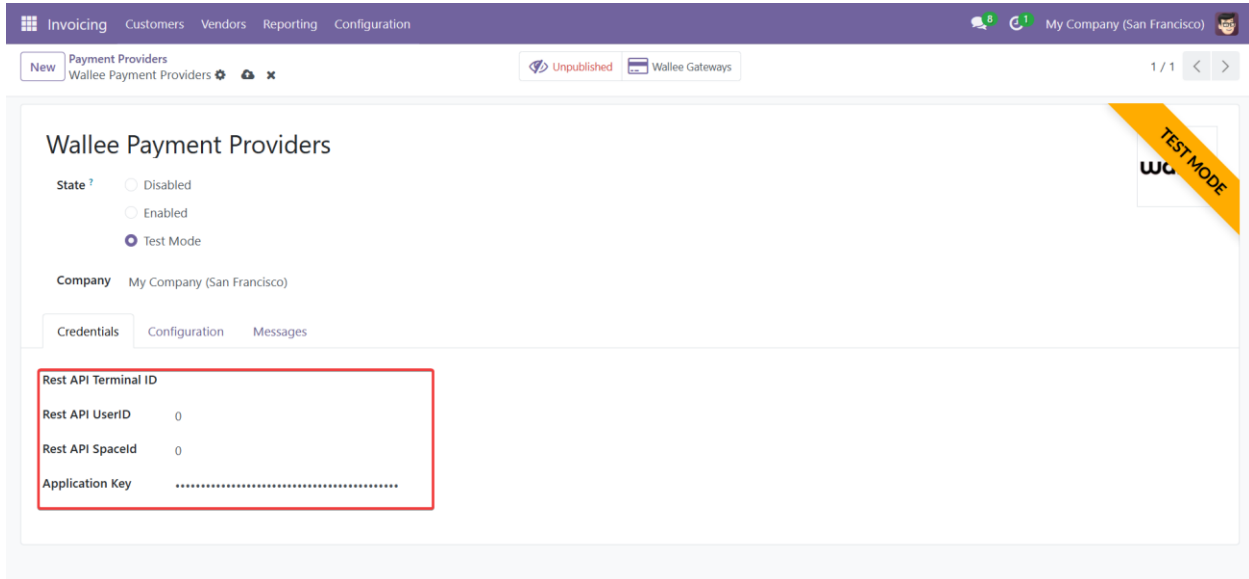
*Invoicing > Configuration > Payment Providers*

These paths will direct you to the configuration settings for managing payment providers.



### Screenshot 2: Odoo Backend Configuration of Wallee Credentials

After selecting the Wallee Payment Provider from the list, navigate to the *Credentials* tab. In this section, you can enter the credentials for your Wallee Payment Provider space.



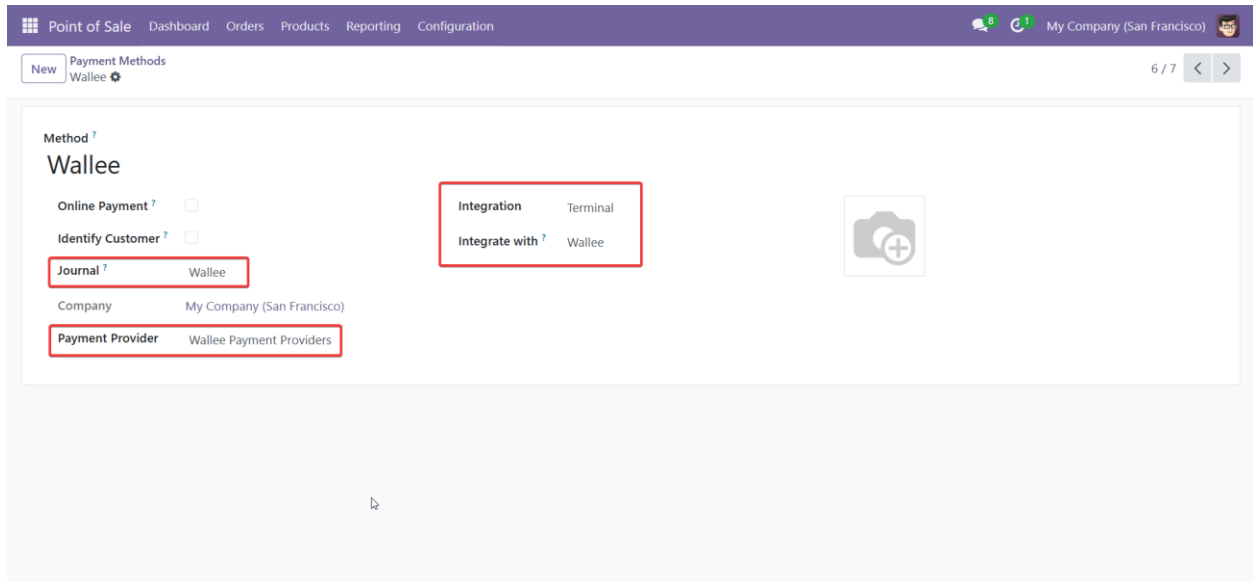
To configure the Wallee Payment Provider in Odoo, you will need the following details from Wallee:

1. **REST API User ID:** The *Application User ID* created on app-wallee.com.
2. **REST API Space ID:** The *Space ID* obtained from app-wallee.com.
3. **Application Key:** The *Application Key* generated on app-wallee.com.
4. **REST API Terminal ID:** The identifier of the terminal to be used for processing transactions.

After entering these details, you can set the status to 'Enabled' for live transactions or 'Test Mode' for testing purposes.

### Screenshot 3: Create POS Payment Method for Wallee

To create a POS payment method for Wallee, navigate to *Point of Sale > Configuration > Payment Methods*. From this screen, click on the 'New' button to create a new payment method.



The screenshot shows the Odoo Point of Sale Configuration - Payment Methods screen for Wallee. The form is titled "Method ?" and "Wallee". The fields are:

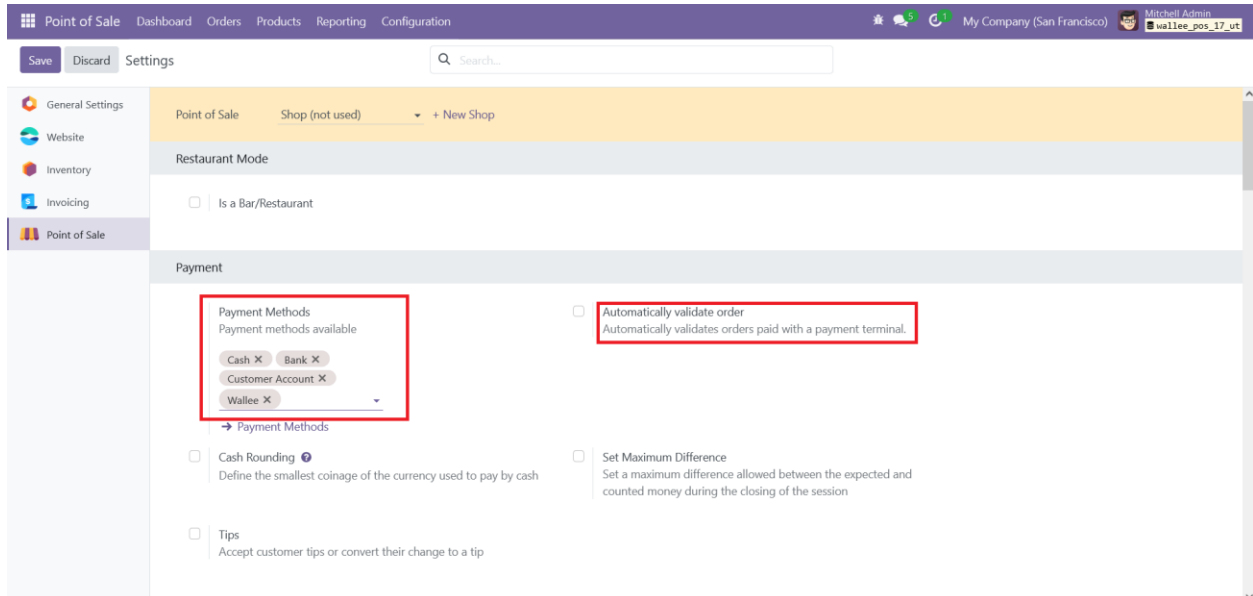
- Online Payment ?
- Identify Customer ?
- Journal ? Wallee
- Company My Company (San Francisco)
- Payment Provider Wallee Payment Providers
- Integration Terminal
- Integrate with ? Wallee

Then create a new payment method, naming it "Wallee." Assign a suitable journal for tracking Wallee transactions. Under the "Payment Provider" field, select "Wallee Payment Providers." Finally, choose the "Terminal" option from Integration and select "Wallee" from Integrate with option.

#### Screenshot 4: POS Payment Method Configuration for Wallee

After creating the POS payment method, go to the Point-of-Sale settings, navigate to the Payment section, and add Wallee to the Payment methods available field.

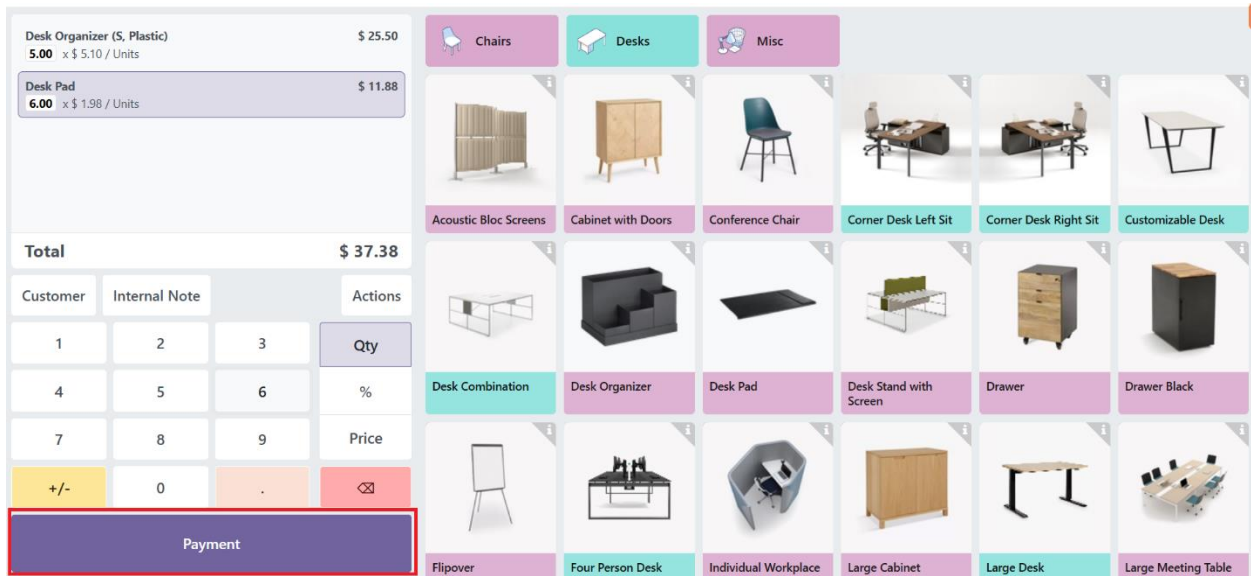
Also, enable the 'Automatically validate order' option if you prefer to automatically validate orders when they are paid using a payment terminal.





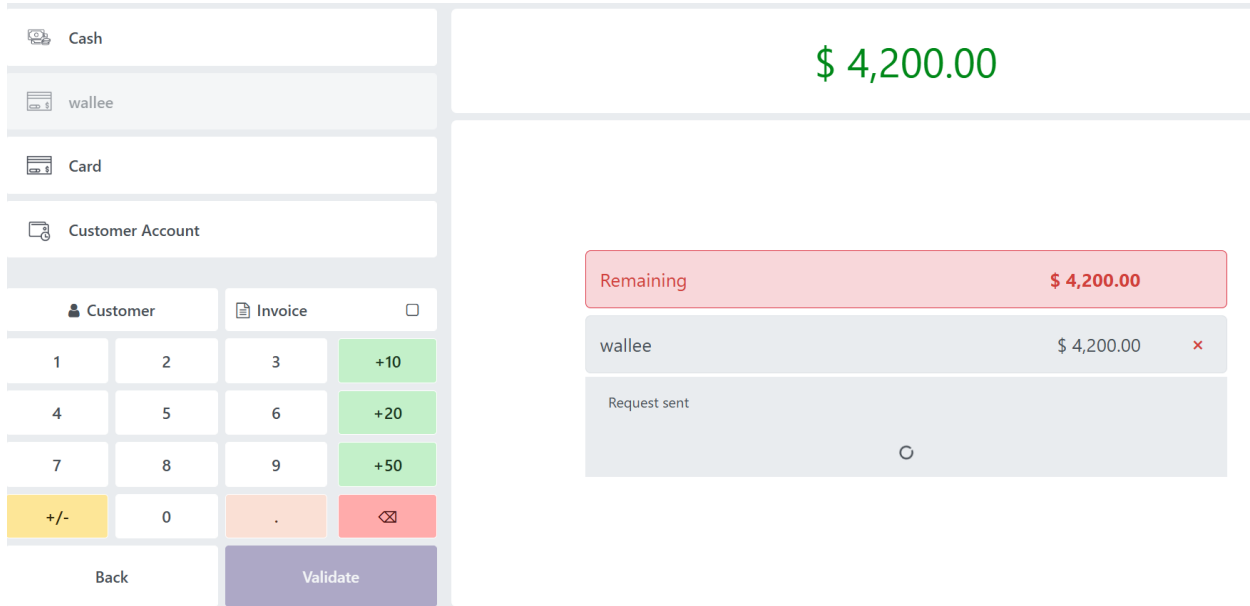
*Screenshot 5: Odoo POS Product Screen*

After the POS payment method configuration, go to the POS interface and select the desired products for the customer, choose an existing customer or create a new one, and then proceed to the payment screen.



### Screenshot 6: Odoo POS Payment Screen

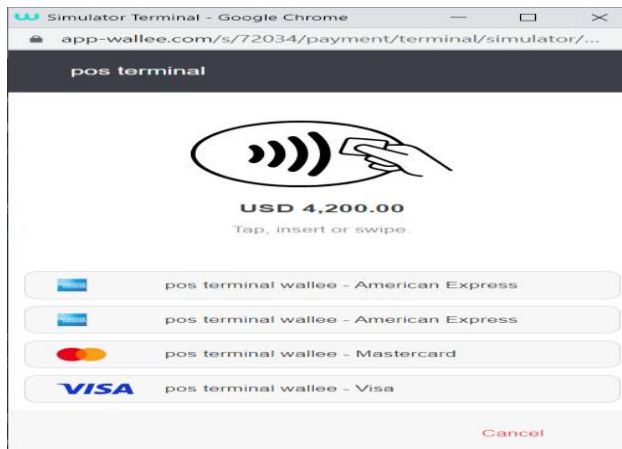
From this screen select the Wallee payment method.



After selecting the Wallee payment method, initiate the payment request and send it to the Wallee payment gateway for processing.

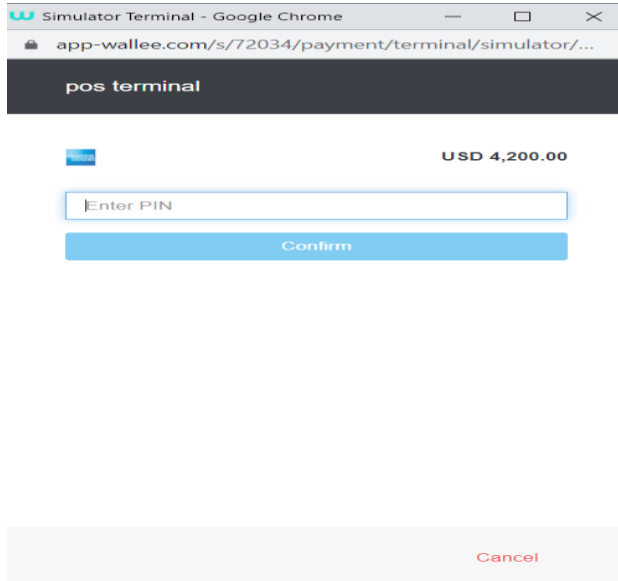
### Screenshot 7: Wallee POS Payment Terminal

In the Wallee POS payment terminal, the payment amount will be displayed. Choose the card from the terminal and enter your PIN to complete the transaction.



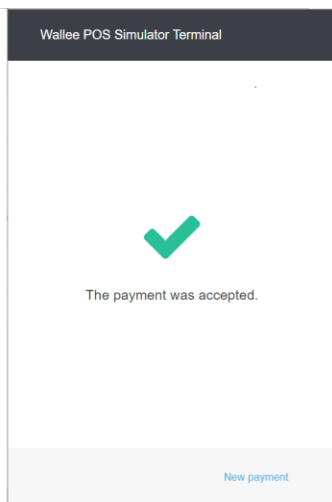
*Screenshot 8: Wallee POS Payment Terminal PIN Entering Screen*

You can enter your PIN to complete the transaction after selecting the card.



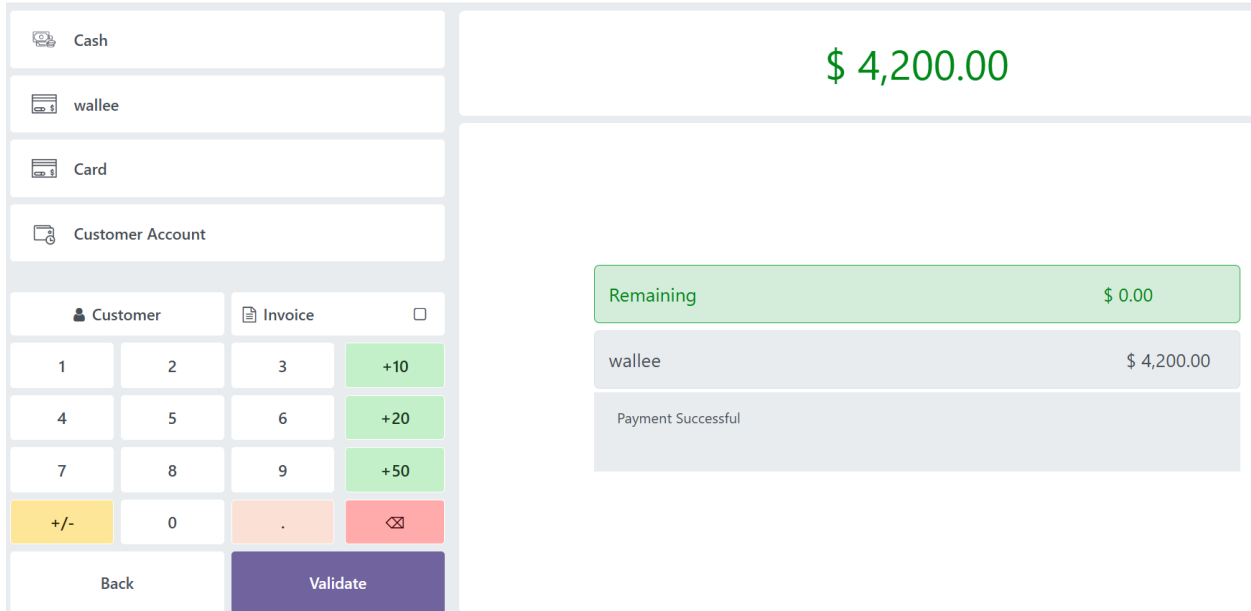
*Screenshot 9: Wallee POS Payment Terminal Payment Success*

If the transaction is success, then you can see the payment success message in the POS terminal.



### Screenshot 10: Odoo POS Payment Success Status

Upon successful payment, you can see the "Payment Successful" status displayed on the Odoo POS payment screen. If you haven't enabled the 'Automatically validate order' setting, the 'Validate' button will become active, allowing you to manually validate the order.



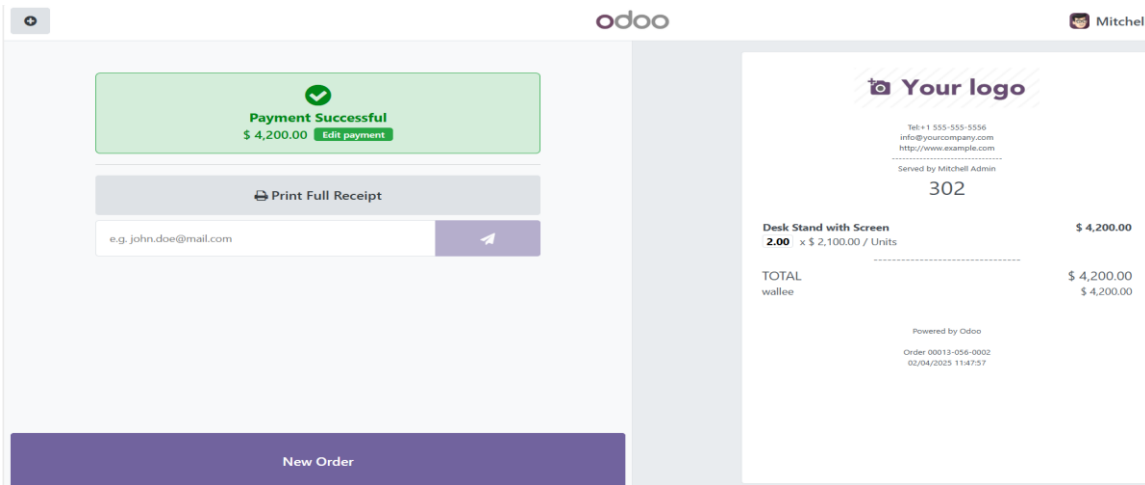
The screenshot displays the Odoo POS interface during a successful payment. On the left, a vertical menu lists payment methods: Cash, wallee, Card, and Customer Account. Below this is a numeric keypad with buttons for digits 1-9, '+/-', '0', '.', and a delete key. At the bottom of the keypad are 'Back' and 'Validate' buttons. The main display area shows a total of \$4,200.00 in green. Below this, a summary table shows the remaining balance as \$0.00, the payment method 'wallee' for \$4,200.00, and a confirmation message 'Payment Successful'.

Customer	Invoice
1	2
4	5
7	8
+/-	0

Remaining	\$ 0.00
wallee	\$ 4,200.00
Payment Successful	

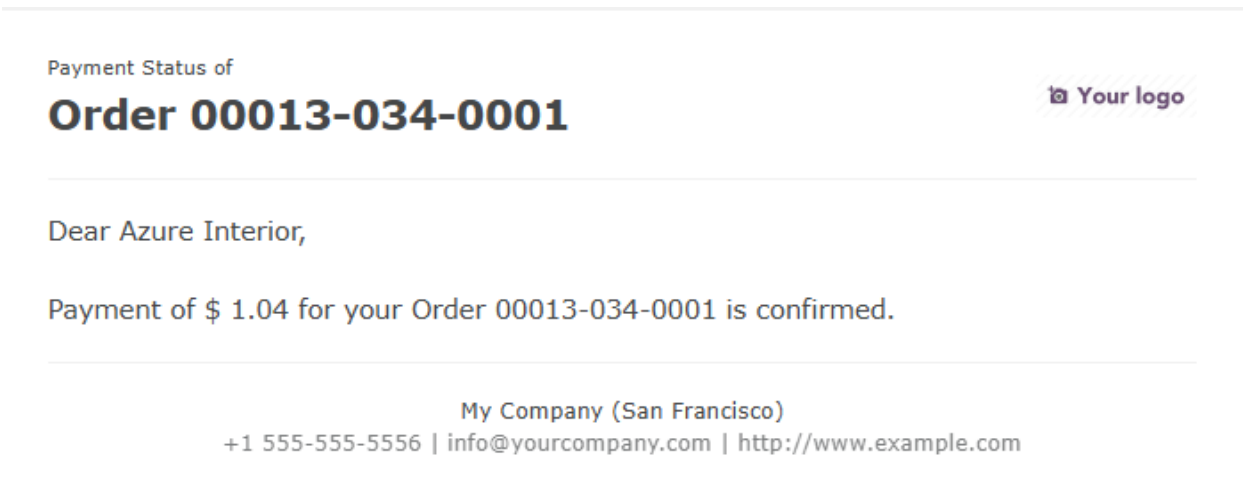
### Screenshot 11: Odoo POS Order Validated Screen

Once the order is validated, you can see this screen in Odoo. From here you can send and print the order receipt by clicking the paper plane icon button and the 'Print Receipt' button respectively.



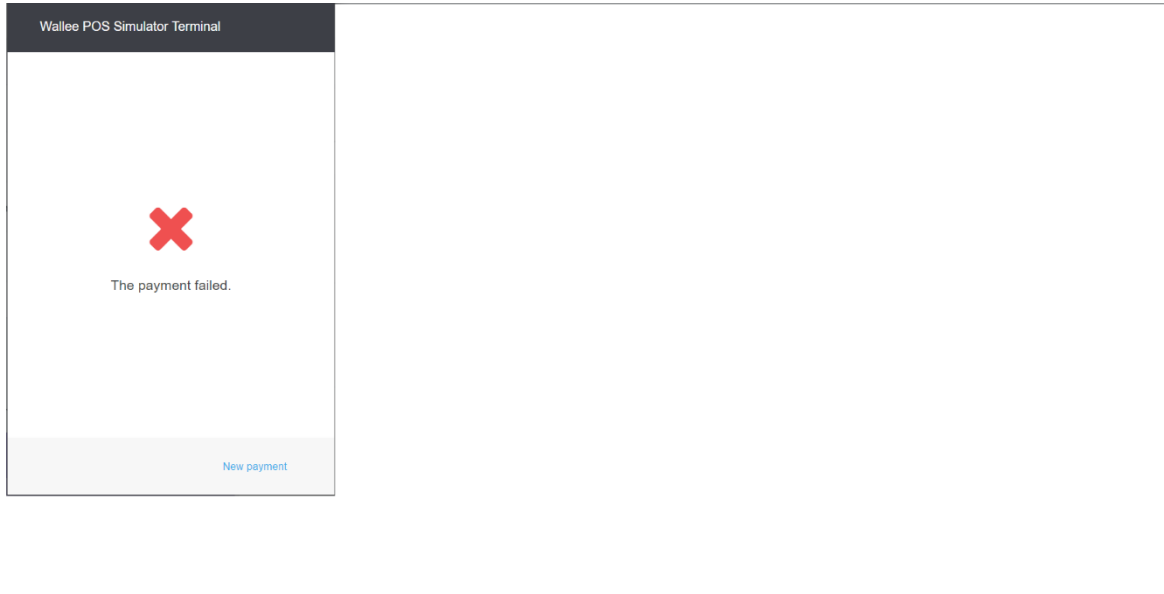
### Screenshot 12: Wallee Payment Successful Email to Customer

If a customer is selected during the payment process, an email will be sent to the customer mentioning the confirmation of payment along with the amount paid.



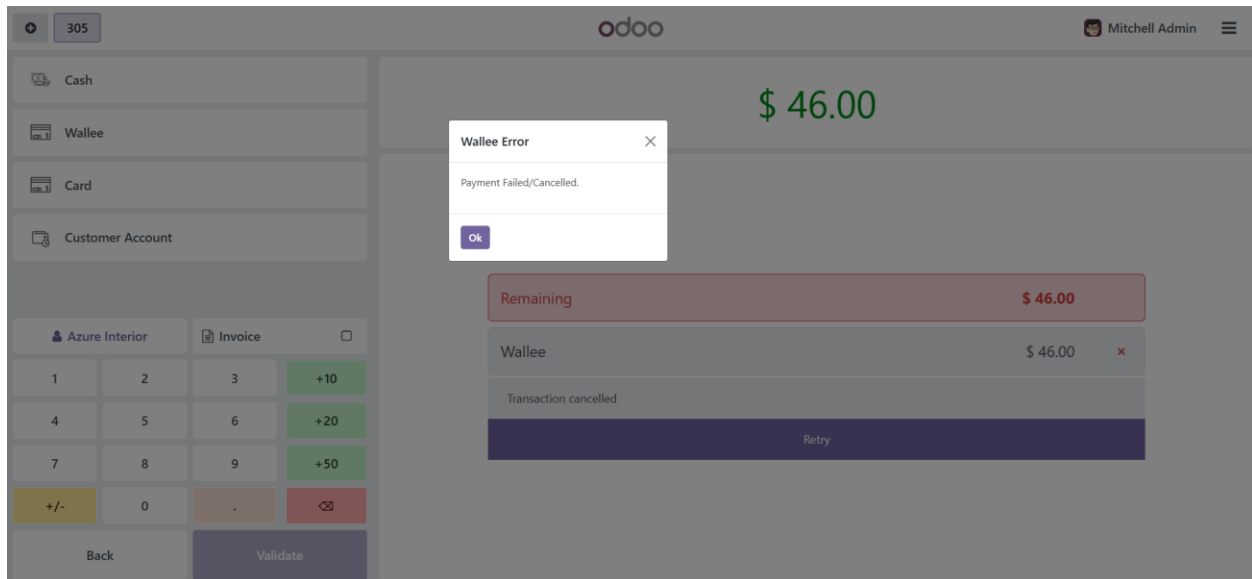
*Screenshot 13: Wallee Payment Cancelled Screen*

If the transaction is failed, then you can see the below error messages in Wallee and Odoo respectively.



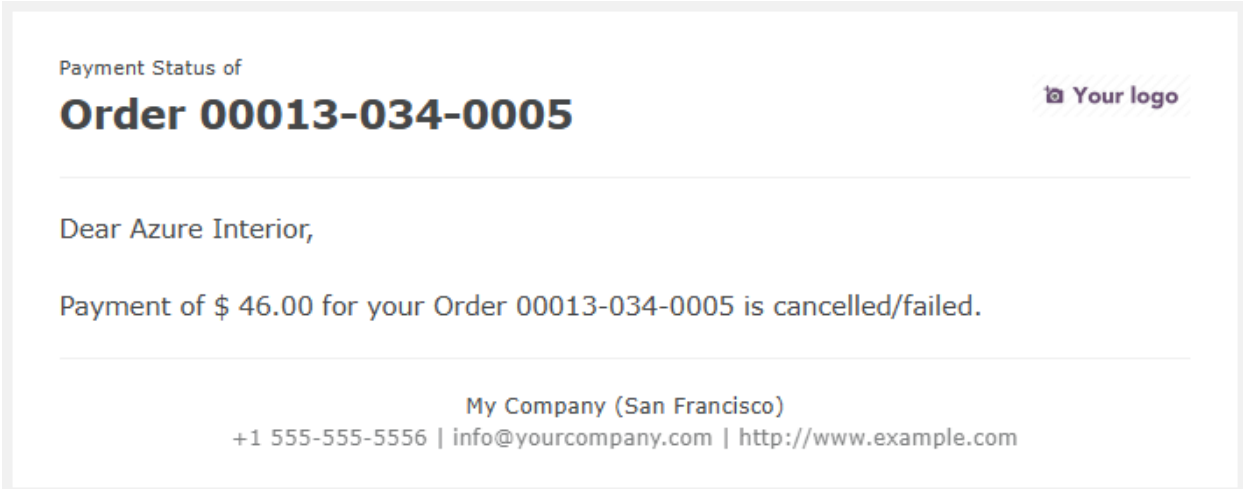
*Screenshot 14: Odoo POS Payment Cancelled Screen*

If the transaction fails in Odoo and is not cancelled from the Wallee terminal, you need to manually cancel it from the Wallee terminal.



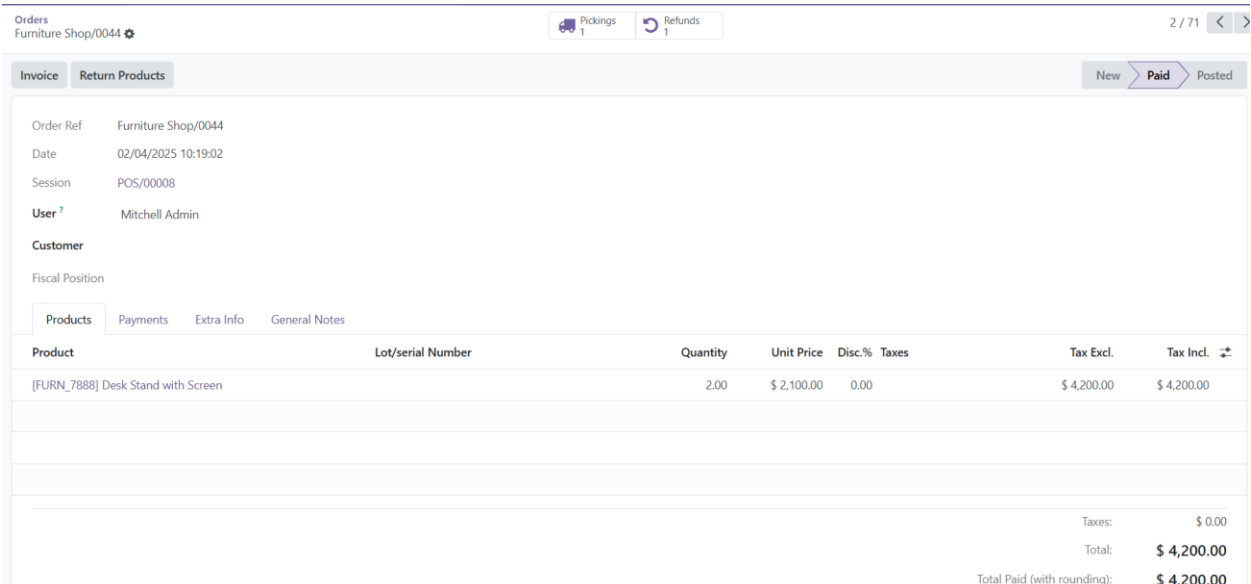
### Screenshot 15: Wallee Payment Cancelled/Failed Email to Customer

If the transaction is cancelled from the Wallee terminal during the payment process, an email will be sent to the customer mentioning the cancellation/failure of payment.



### Screenshot 16: Odoo POS Order Screen

After a successful payment, order/transaction details will be recorded in Odoo under the Orders menu and in Wallee under the Transactions menu.



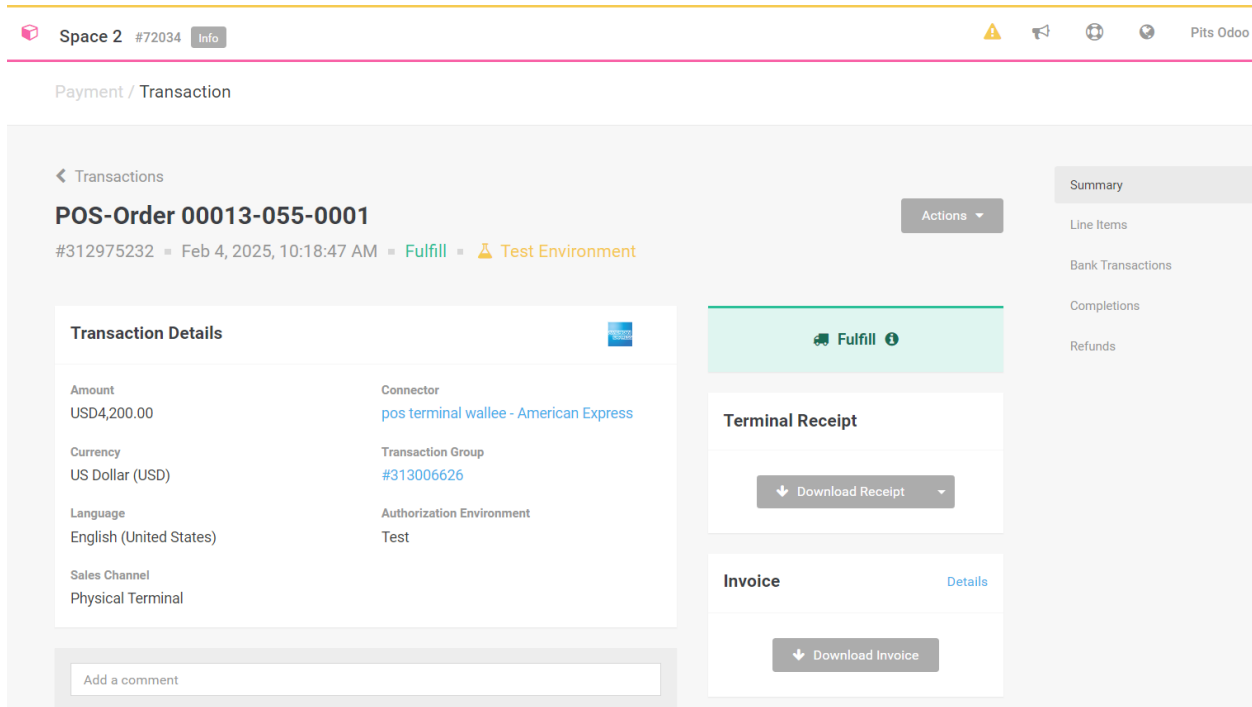
The screenshot displays the Odoo POS Order Screen for "Orders Furniture Shop/0044". The interface includes tabs for "Invoice" and "Return Products", and a status bar showing "New", "Paid", and "Posted". The order details are as follows:

Product	Lot/serial Number	Quantity	Unit Price	Disc.%	Taxes	Tax Excl.	Tax Incl.
[FURN_7888] Desk Stand with Screen		2.00	\$ 2,100.00	0.00		\$ 4,200.00	\$ 4,200.00

Summary:

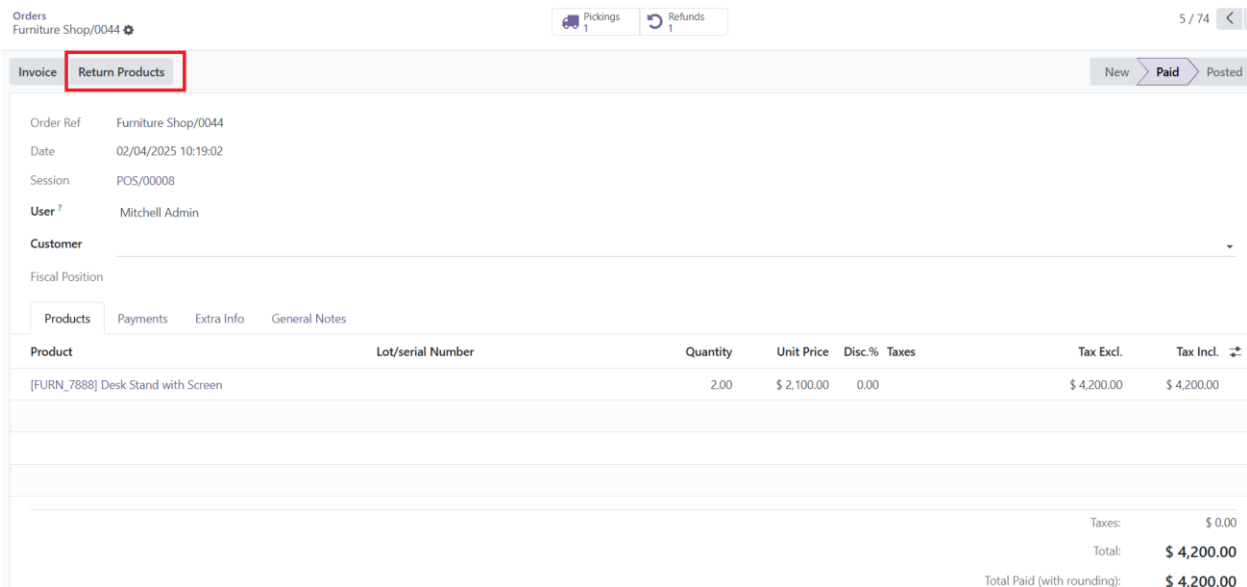
Taxes:	\$ 0.00
Total:	\$ 4,200.00
Total Paid (with rounding):	\$ 4,200.00

Screenshot 17: Payment Transaction in Wallee Back Office



Screenshot 18: Refund option from the pos order

For refund, click on the "Return Product Button" in the order

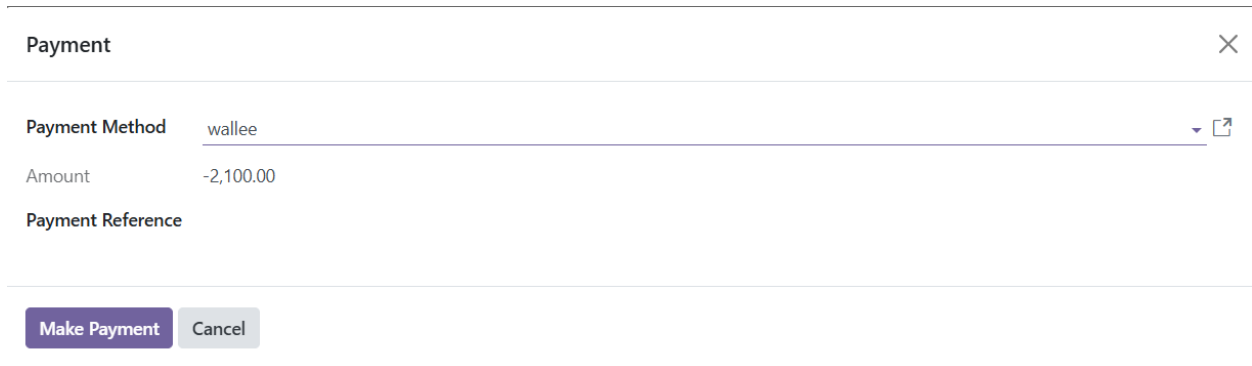


Product	Lot/serial Number	Quantity	Unit Price	Disc.%	Taxes	Tax Excl.	Tax Incl.
[FURN_7888] Desk Stand with Screen		2.00	\$ 2,100.00	0.00		\$ 4,200.00	\$ 4,200.00
Taxes:						\$ 0.00	
Total:						\$ 4,200.00	
Total Paid (with rounding):						\$ 4,200.00	



Then, a refund POS order will be created. We can set the quantity for the refund and click on the **Payment** button. A pop-up will appear, allowing us to change the payment method to **Wallee** and proceed with the payment.

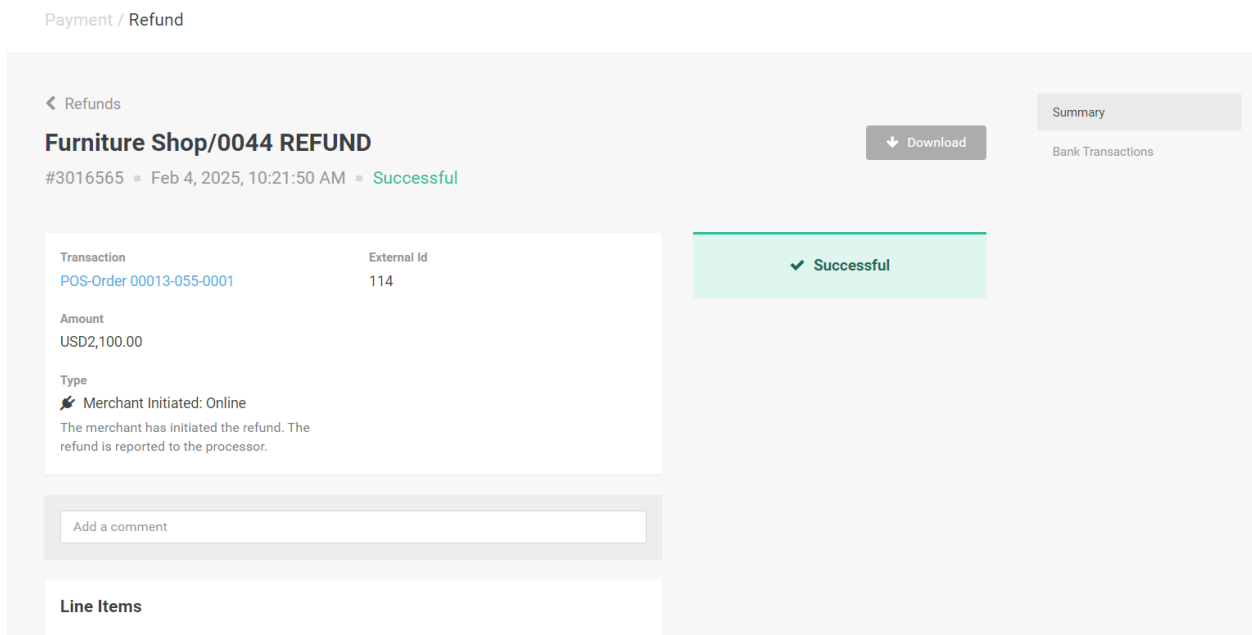
*Screenshot 19: Payment Method Popup for Refund option from the pos order*



The screenshot shows a modal window titled "Payment" with a close button (X) in the top right corner. The modal contains the following fields and buttons:

- Payment Method:** A dropdown menu currently set to "wallee".
- Amount:** A text input field containing "-2,100.00".
- Payment Reference:** An empty text input field.
- Buttons:** Two buttons at the bottom: "Make Payment" (highlighted in purple) and "Cancel" (grey).

*Screenshot 20: Refund in Wallee Back Office*



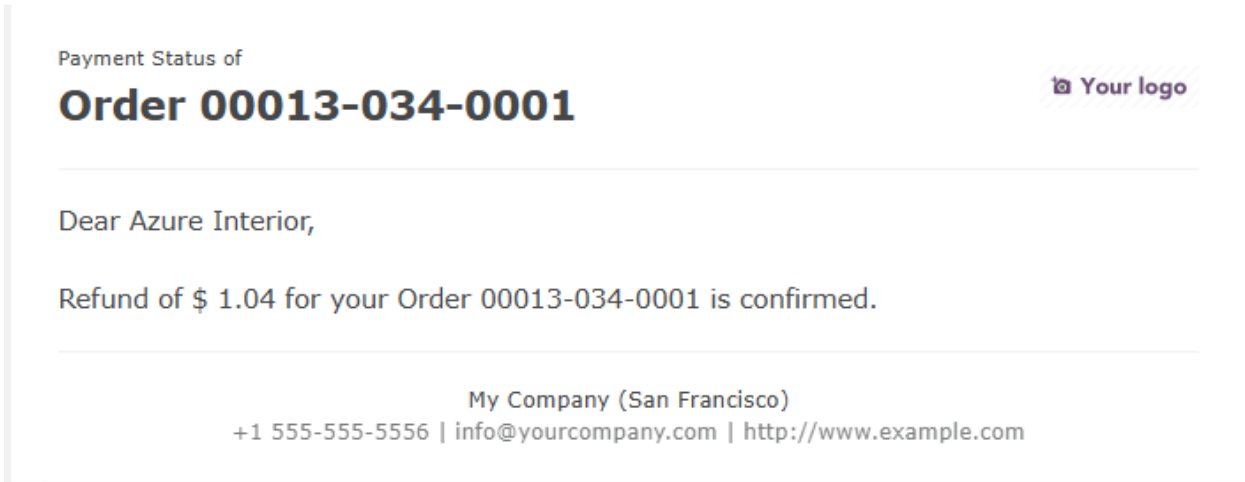
The screenshot shows the "Refunds" section in the Wallee Back Office. The main heading is "Furniture Shop/0044 REFUND". Below the heading, there is a status bar showing "#3016565" followed by a date and time "Feb 4, 2025, 10:21:50 AM" and a green "Successful" status. A "Download" button is visible next to the status bar. On the right side, there is a "Summary" tab and a "Bank Transactions" link. The main content area is divided into two columns. The left column contains transaction details:

Transaction	External Id
POS-Order 00013-055-0001	114

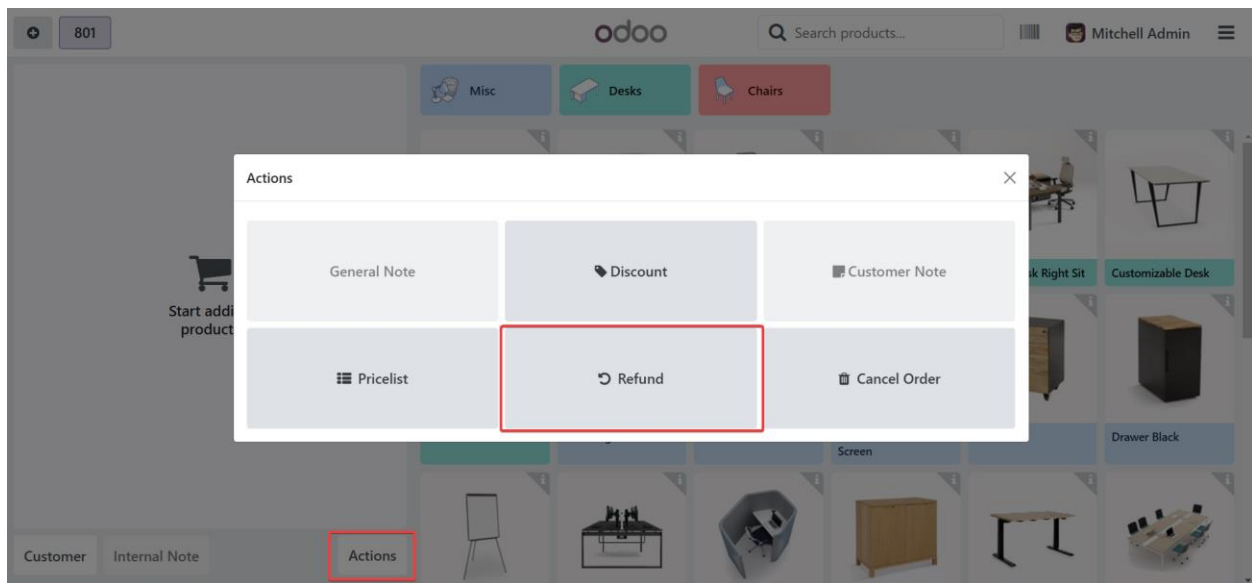
Below the table, the "Amount" is listed as "USD2,100.00". The "Type" is "Merchant Initiated: Online" with a sub-note: "The merchant has initiated the refund. The refund is reported to the processor." Below this is a text input field labeled "Add a comment". At the bottom, there is a section titled "Line Items". On the right side of the main content area, there is a green box with a checkmark and the text "Successful".

### Screenshot 21: Wallee Payment Refund Email to Customer

If a customer is selected during the payment process, an email will be sent to the customer mentioning the refund of payment along with the refund amount.



### Screenshot 22: Refund option through POS Store



The refund through POS store can be done clicking on **Actions** button followed by clicking **Refund** button.

Screenshot 23: Refund option through POS Store

The screenshot shows the Odoo POS interface. On the left, there is a list of orders with columns for Date, Receipt Number, Order number, Customer, Cardholder Name, Cashier, Total, and Status. The first order is highlighted in purple. On the right, there is a summary panel for the selected order, showing 'LED Lamp 1.00 x \$ 1.04 / Units' for a total of \$ 1.04. Below this, there are buttons for 'Details', 'Invoice', and 'Print Receipt'. At the bottom right, a large purple button labeled 'Refund' is highlighted with a red border.

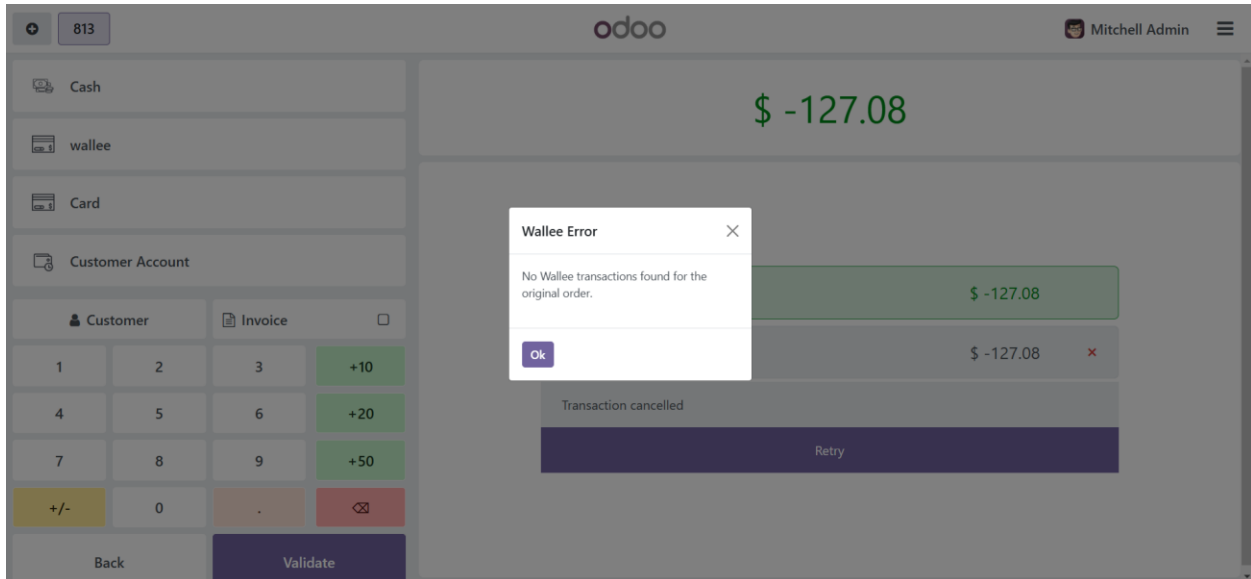
Select the order that should be refunded and click on the **Refund** button.

Screenshot 24: POS Store Refund Payment

The screenshot shows the Odoo POS payment terminal interface. On the left, there is a sidebar with payment methods: 'Cash', 'wallee', 'Card', and 'Customer Account'. The 'wallee' option is highlighted with a red border. Below this is a numeric keypad and a 'Validate' button. The main area shows a large green '\$ -1.04' at the top. Below that, there is a green box labeled 'Remaining' with '\$ 0.00'. Underneath, a grey box shows 'wallee' with '\$ -1.04' and a 'Payment Successful' message.

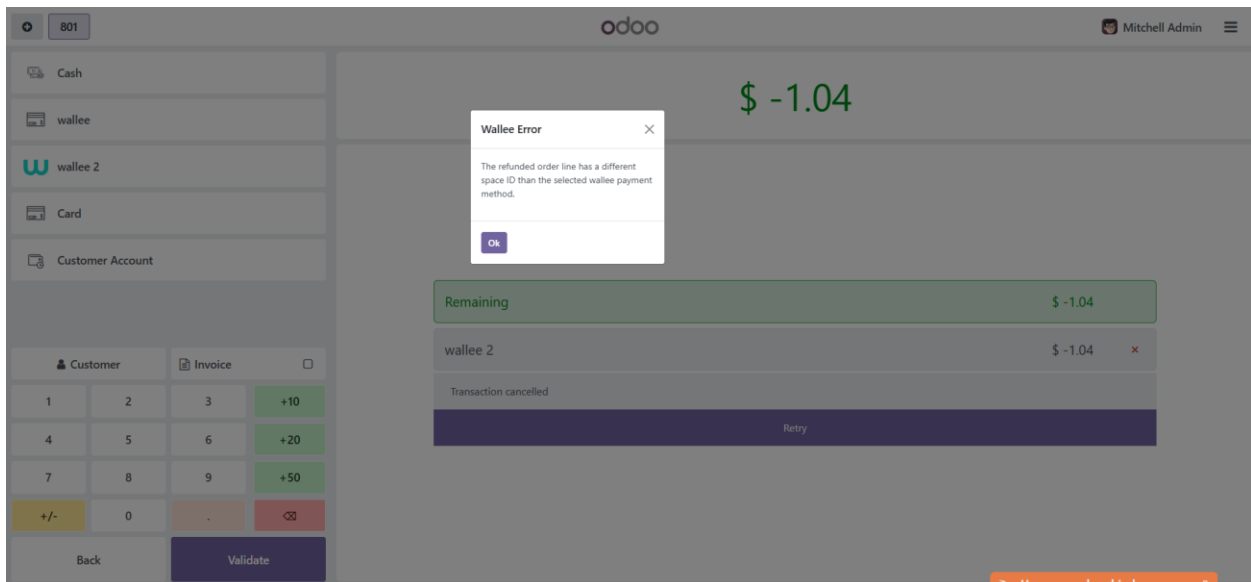
Select the **Wallee** payment and the refund transaction will be completed automatically.

Screenshot 25: Validation for selecting non Wallee payment method



If Wallee refund transaction is tried on a non-Wallee order, a validation error will be displayed as **“No Wallee transactions found for the original order.”**

Screenshot 26: Validation for selecting Wallee payment method in another Space ID



If Wallee Payment was completed through payment method say **“wallee”** and for refund if selected payment method **“wallee 2”** in another space ID, a validation error will be displayed as **“The refunded order line has a different space ID than the selected wallee payment method.”**

## 4. Technical Requirements / Compatibility

- **Technical Requirements:** Requires Odoo Point of Sale, Payment, and Invoicing modules.
- **Compatible With:** Odoo 18.0 Community Edition and Enterprise Edition.

## 5. Change Log / Release Notes

- Version 1.1.0: May 2025
  - Added compatibility with Odoo 18.0 Enterprise Edition.
- Version 1.0.1: April 2025
  - Enhanced the POS payment flow for Wallee terminals to address issues where transactions could remain indefinitely in a "waiting" state.
  - Introduced a retry limit to gracefully halt polling during extended pending states, improving system stability and user experience.
- Version 1.0.0: February 2025
  - Initial release.

## 6. Support

If you have questions, use our contact form at [webshopextension.com](https://www.webshopextension.com) or email at [support@webshopextension.com](mailto:support@webshopextension.com).