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## User Manual

# PostFinance Checkout Flex Payment Plugin for Odoo v18.0

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## 1. Introduction

The **PostFinance Checkout Flex extension** from PIT Solutions serves as a connector between PostFinance Checkout Flex and the Odoo Web Shop. It provides a standardized way to accept payments through a wide variety of payment providers worldwide. The extension supports payment gateways such as **PostFinancePay**, **TWINT**, **PayPal**, **Online Banking**, and **Credit/Debit Cards**. More information is available under **PostFinance Checkout Flex**.

This extension links Odoo Shop users to a payment hub, which has over 50 payment gateways and processors integrated. It operates using the **Rest API**, helping to reduce cart abandonment by offering customers their preferred payment gateway. It also integrates with different payment service provider APIs, lowering payment routing costs.

## 2. Features

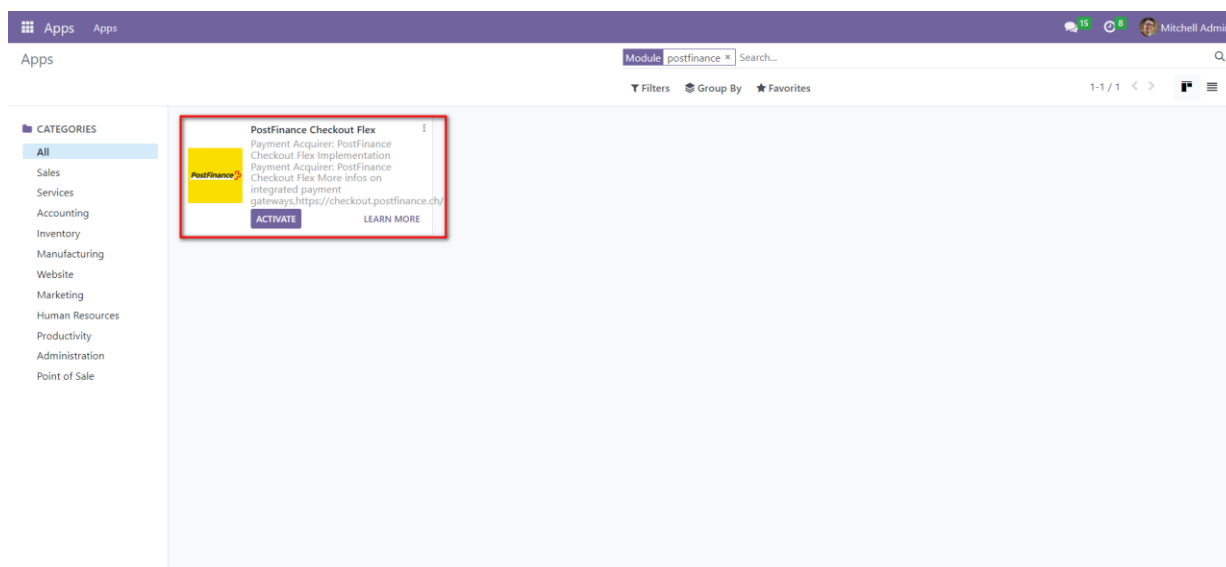
- Easy to install.
- Flexible.
- User-friendly and configurable to meet specific requirements.
- Supports multiple payment methods.
- Maintains transaction records.
- I-frame integration.
- Multi-website compatibility.

- Supports payment gateways like PostFinance Pay, TWINT, PayPal, Online Banking, and Credit/Debit Cards.
- Offers payment methods for processors such as **Worldline**, **TWINT**, **PostFinance Acquiring**, and **PayPal**.

### 3. Screenshots

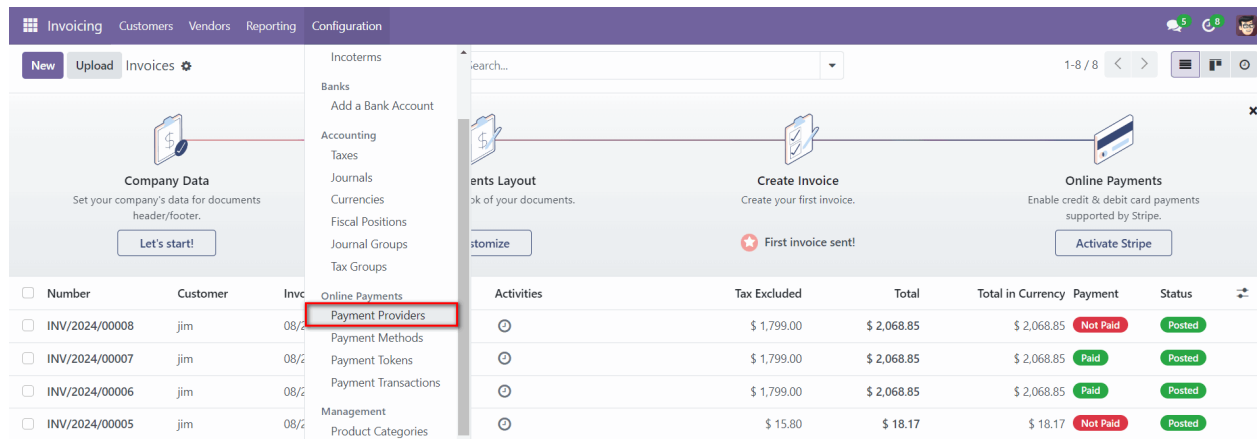
Install the PostFinance module:

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



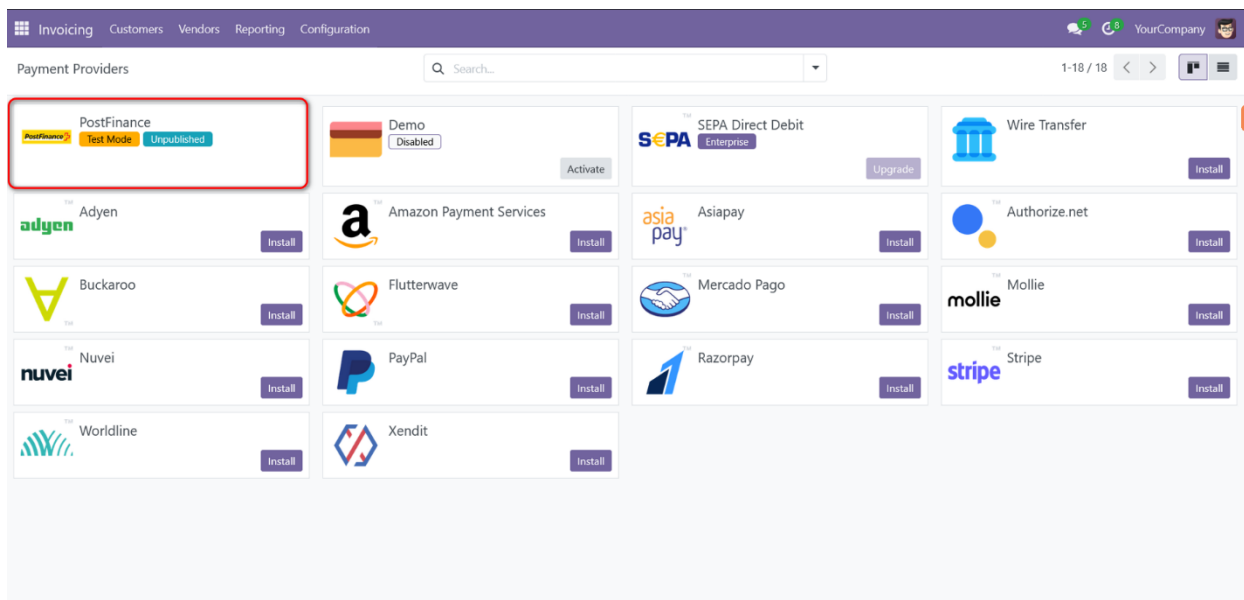
*Screenshot 1: PostFinance app activation*

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



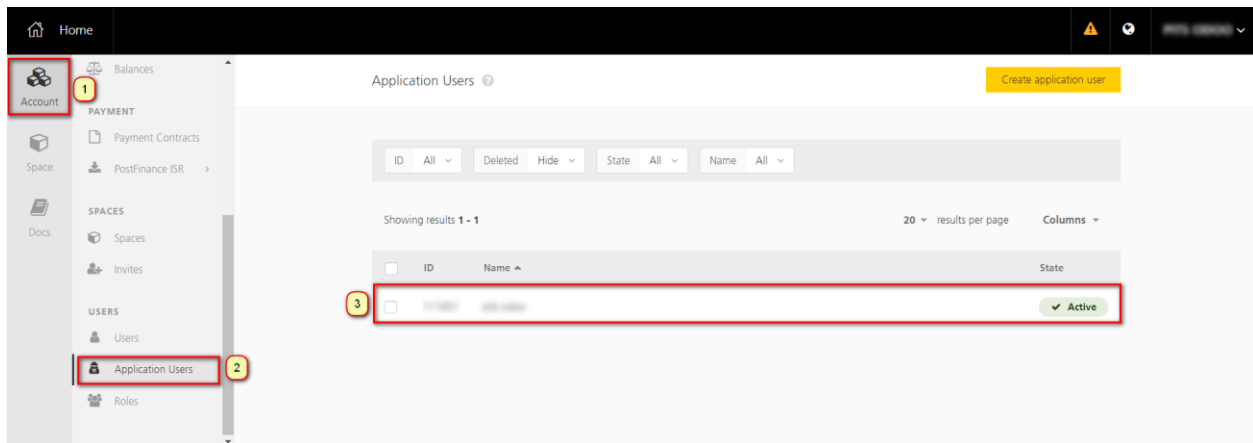
Screenshot 2: Payment Providers menu item

- Click on *PostFinance Payment Providers*.



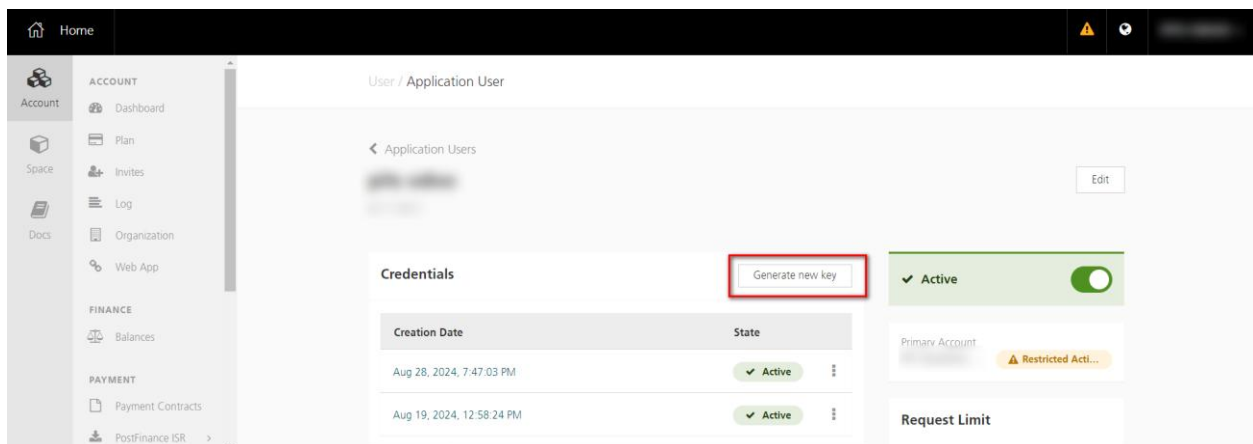
Screenshot 3: PostFinance Payment Provider

- Go to <https://checkout.postfinance.ch/> -> Login.
- Navigate to *Account -> Application Users -> Open User -> Copy the ID*.



*Screenshot 4: PostFinance Account Page*

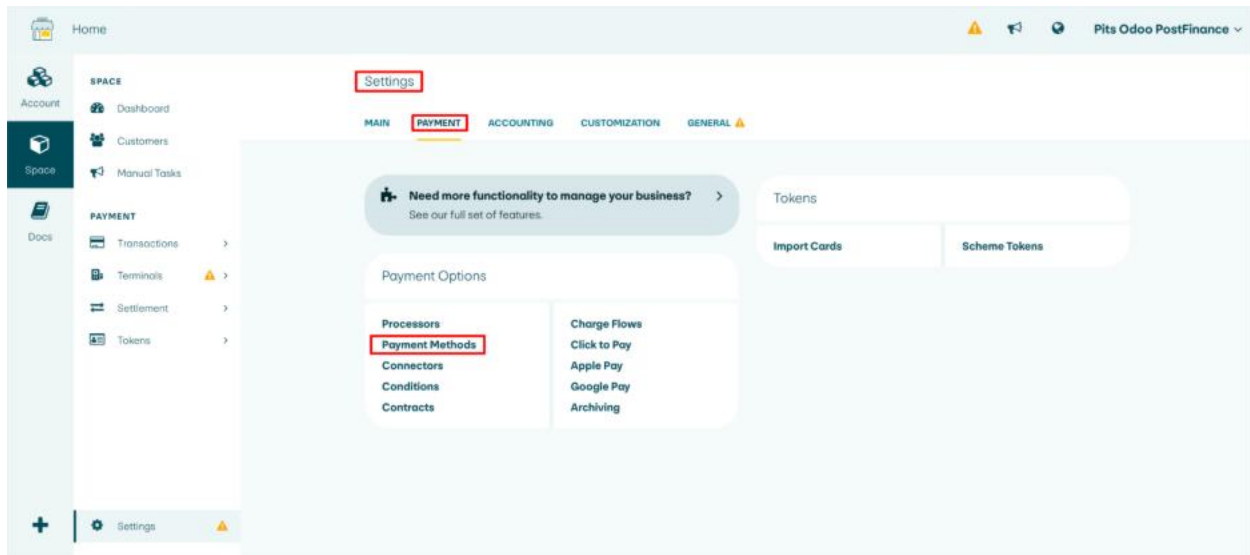
- Generate new key -> Copy the generated key.



*Screenshot 5: PostFinance New key Generation*

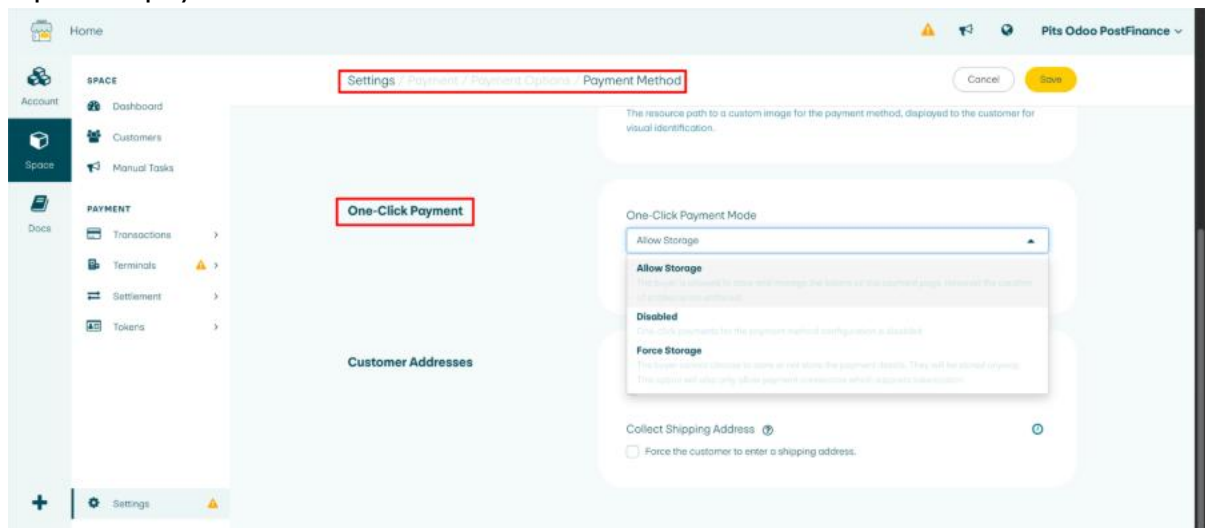
- Go to *Spaces*-> Fetch the *Space ID*.
- Enter the *Rest API UserID*, *Rest API Space ID* and *Application Key* to PostFinance payment provider configuration in Odoo backend.
- Move the payment provider to desired state and publish the provider.

- Activate one-click payment to keep the token saved for upcoming payments.



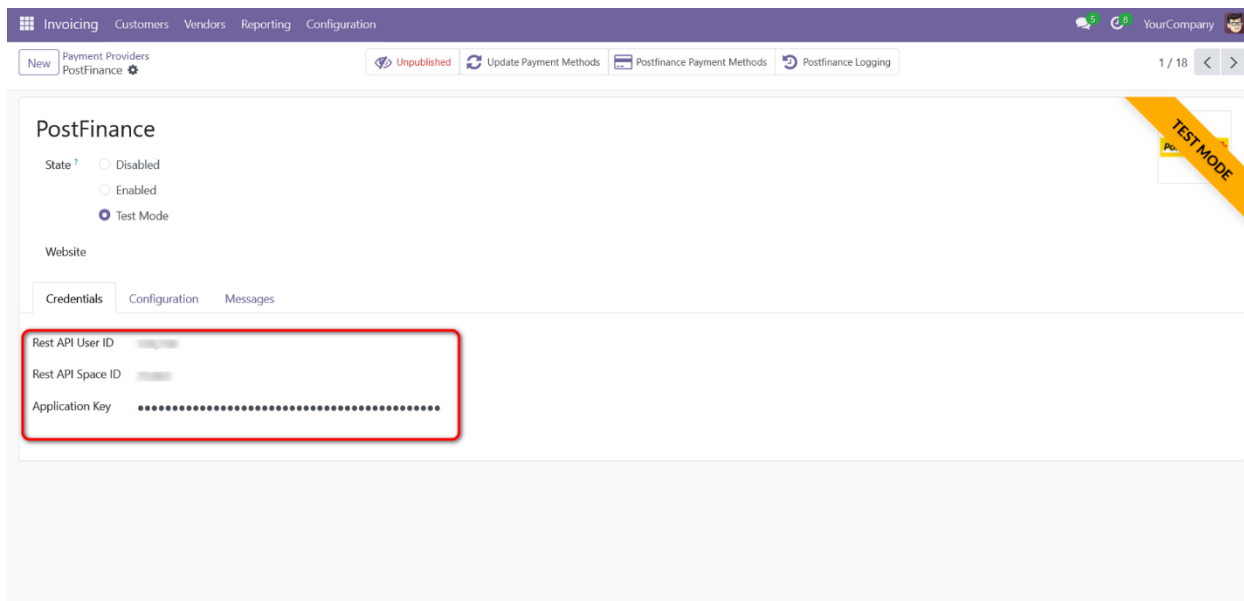
*Screenshot 6: PostFinance Open Payment Methods*

- Go to *Spaces* -> Settings -> Payment -> Payment Methods.
- Open the payment method on which token should be stored.



*Screenshot 7: PostFinance Open Payment Methods*

- Choose the appropriate option as required.



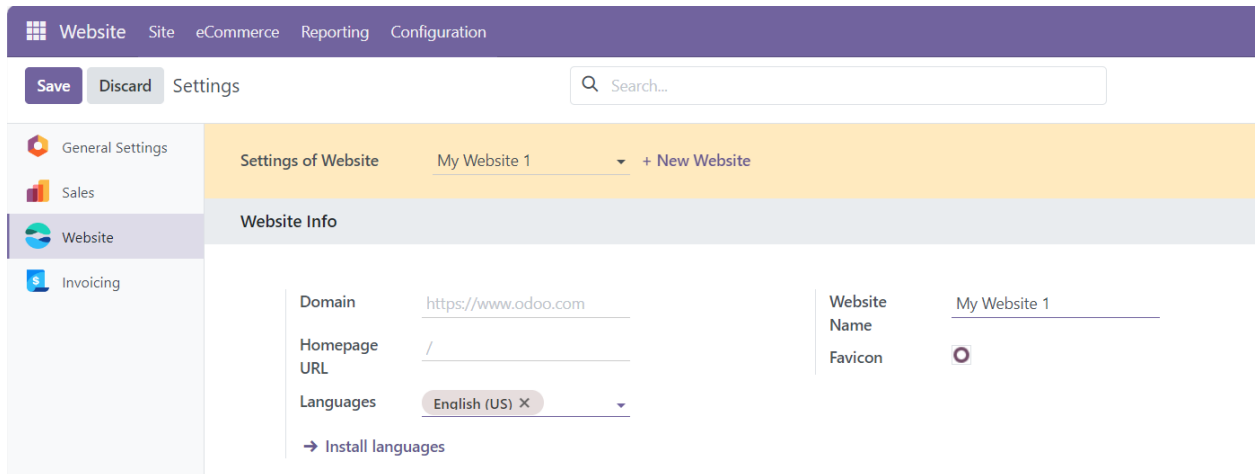
The screenshot displays the Odoo backend interface for the PostFinance configuration. The top navigation bar includes 'Invoicing', 'Customers', 'Vendors', 'Reporting', and 'Configuration'. The 'Configuration' tab is selected, showing a list of payment providers with 'PostFinance' highlighted. The 'PostFinance' configuration page is open, showing the 'Credentials' tab. The 'State' is set to 'Test Mode'. The 'Website' field is empty. The 'Credentials' tab shows three fields: 'Rest API User ID', 'Rest API Space ID', and 'Application Key'. The 'Application Key' field is highlighted with a red box and contains a masked value represented by dots. A yellow banner in the top right corner indicates 'TEST MODE'.

*Screenshot 8: PostFinance configuration in Odoo backend*

**Note: The PostFinance Pay method only supports CHF and EUR as transaction currencies. Any payments attempted with other currencies will not be processed.**



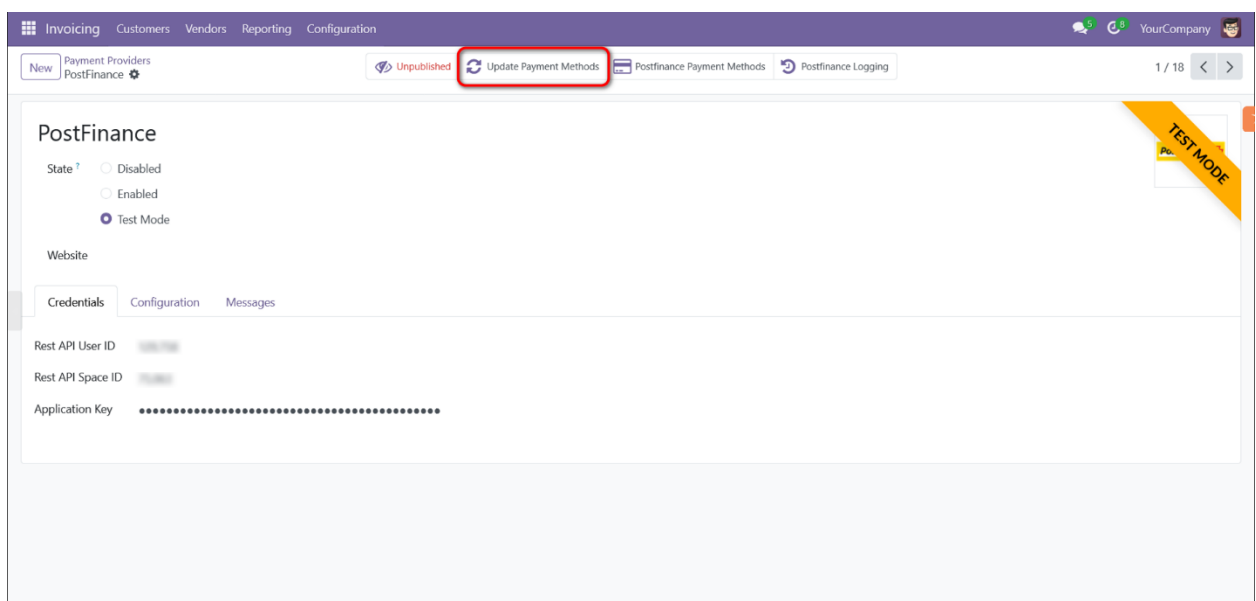
- Navigate to *Website > Configuration > Settings* to create and configure websites as per the requirement.



The screenshot shows the Odoo Website Configuration settings page. The left sidebar contains links for General Settings, Sales, Website, and Invoicing. The main content area is titled 'Settings of Website' and 'My Website 1'. Under 'Website Info', there are fields for Domain (https://www.odoo.com), Homepage URL (/), Languages (English (US) X), and Website Name (My Website 1). There is also a 'Favicon' field with a placeholder icon. A search bar is visible at the top right.

*Screenshot 9: Website Configuration*

- Select the appropriate Website in the Website column to restrict the Payment provider to that specific website. Leaving this column blank will make this provider available in all the websites.



The screenshot shows the Odoo PostFinance configuration page. The top navigation bar includes links for Invoicing, Customers, Vendors, Reporting, and Configuration. The main content area is titled 'PostFinance' and has tabs for Credentials, Configuration, and Messages. The 'Configuration' tab is active, showing fields for Rest API User ID, Rest API Space ID, and Application Key. A red box highlights the 'Update Payment Methods' button. A 'TEST MODE' banner is visible in the bottom right corner.

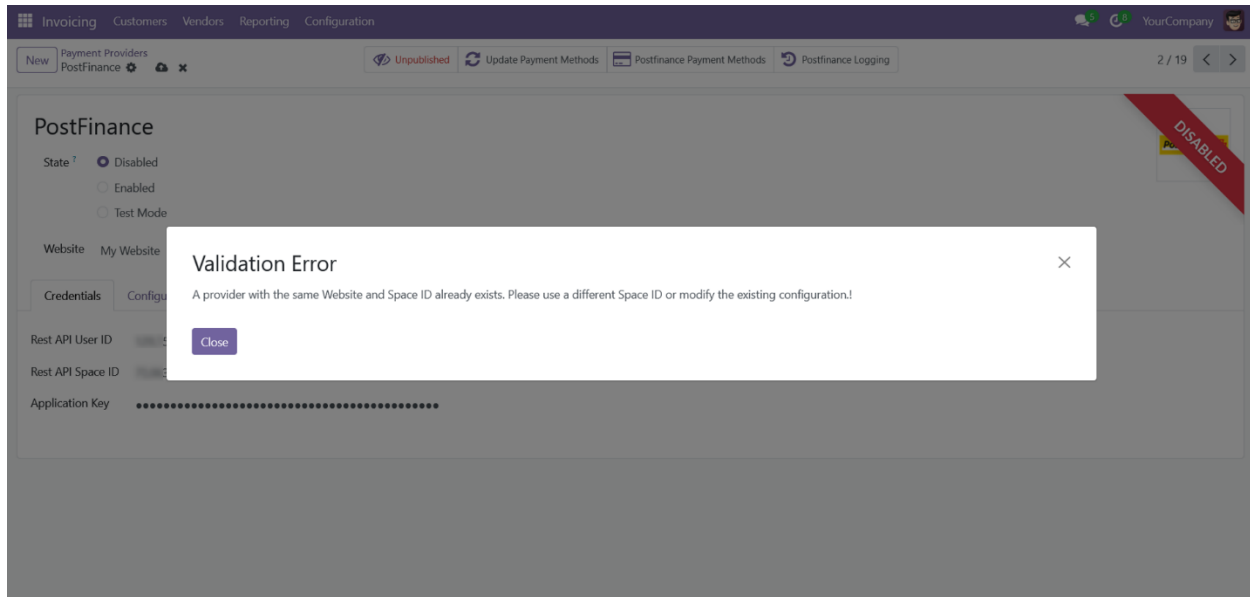
*Screenshot 10: PostFinance Update Payment Methods*

- Click on Update Payment Methods smart button to sync payment methods data from PostFinance back-office.
- The application will raise a warning if the user attempts to configure a provider that meets any of the following conditions:
  - **Condition 1: Duplicate Website and Space ID Combination**

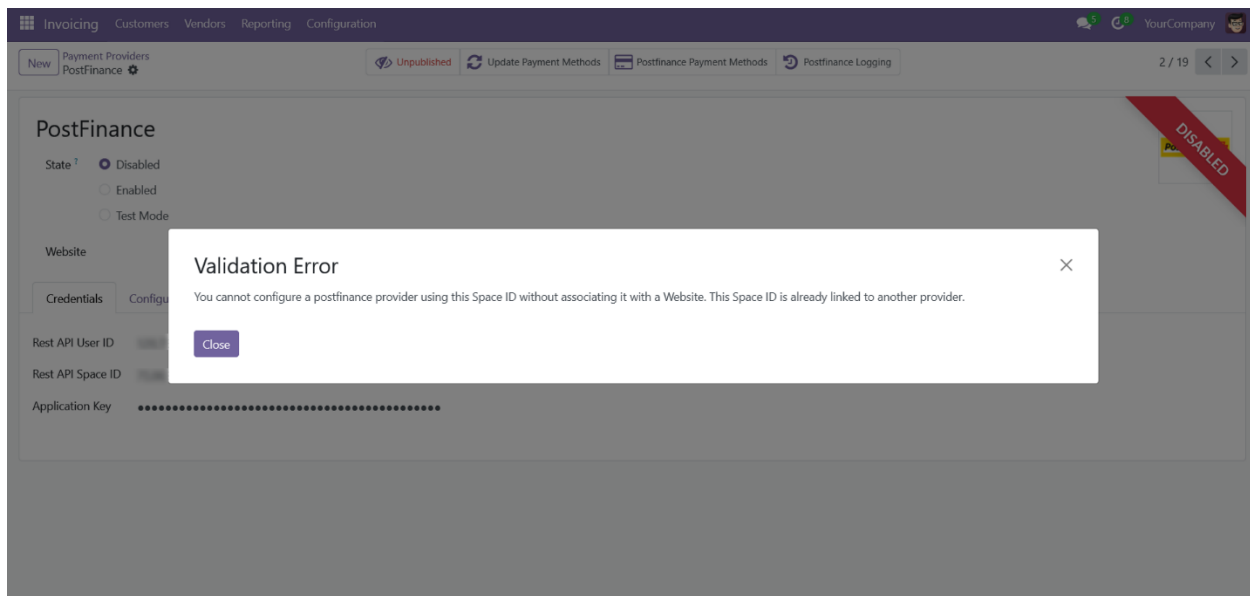
If a provider with the same combination of Website and Space ID is already configured, the system will raise a warning. This prevents duplication and ensures consistency across payment configurations.
  - **Condition 2: Space ID Already Linked to Another Provider Without a Website**

A warning will be raised if the user attempts to configure a provider using a *Space ID* that is already linked to another provider without an associated website. This is critical because a provider configured without a website is accessible across all websites, making the new configuration redundant, as the existing provider already covers all potential payment scenarios.
  - **Condition 3: Configuring a Provider Using a Space ID Without Linking to a Website**

If the user configures a provider using a *Space ID* but does not associate it with a website, the system will issue a warning. This is because such a configuration would override all other providers using the same *Space ID*. To resolve this, the user must either disable the other configurations using the same *Space ID* or remove any existing website links from those configurations.



*Screenshot 11.1: Validations*



*Screenshot 11.2: Validations*

## Process Workflow

- Go to Website -> Shop.
- Add items to cart -> Go to Cart.
- Click *Process Checkout*.

### Confirm order




Billing:	<input type="text"/>	<a href="#">Edit</a>
Shipping:	<input type="text"/>	


### Choose a delivery method

<input checked="" type="radio"/> Standard delivery	Free
--	------

### Pay with

#### CHOOSE A PAYMENT METHOD

<input type="radio"/> Credit / Debit Card - ONSITE ⚠	
<input type="radio"/> PayPal ⚠	
<input type="radio"/> PostFinance Pay ⚠	

	1 x Conference Chair (Steel)	\$ 33.00
Delivery		\$ 0.00
Subtotal		\$ 33.00
Taxes		\$ 4.95
<b>Total</b>		<b>\$ 37.95</b>
<input type="text" value="Discount code..."/>		<a href="#">Apply</a>
<a href="#">Pay now</a>		
or		
<a href="#">Back to cart</a>		

*Screenshot 12: Process Checkout Page*

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

## Powered By Postfinance Interface



▼ Simulation



Manually enter your card details:

Card Number \*

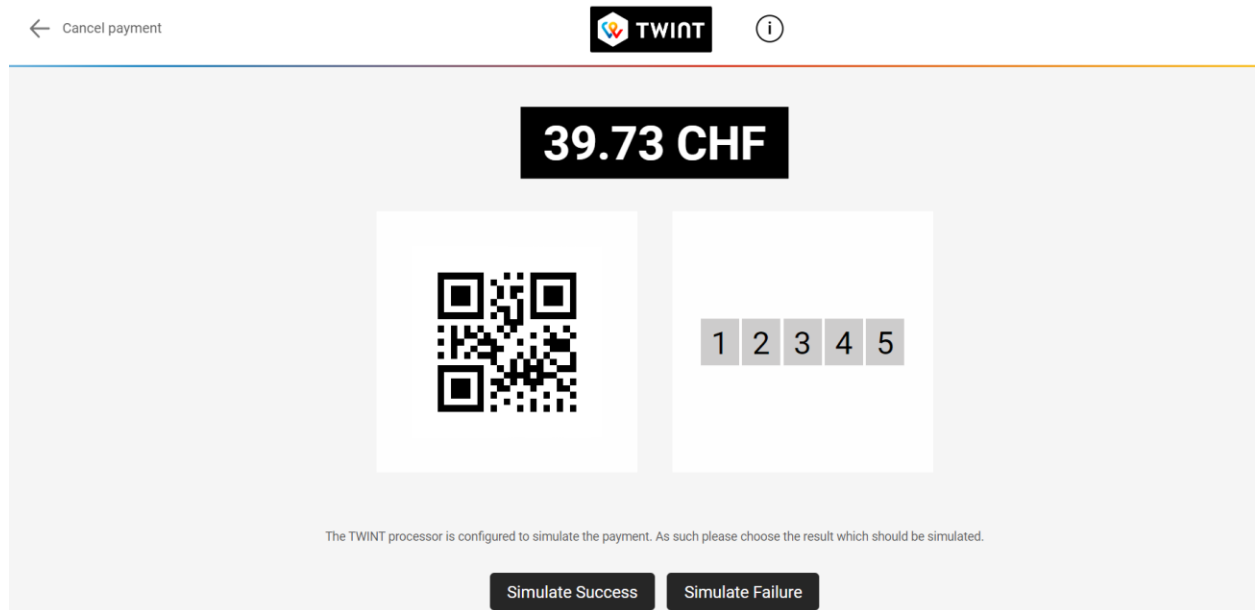
Expiry Date \*

Security Code \*

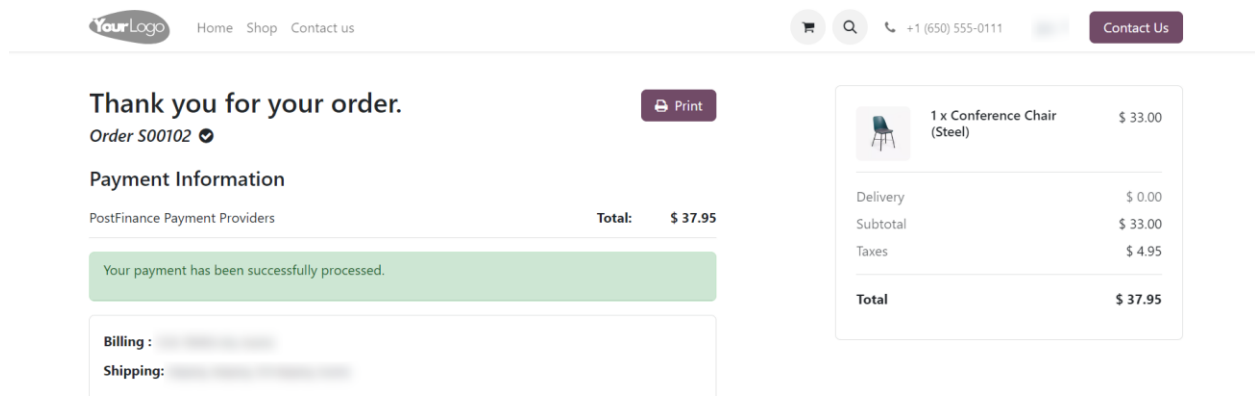
Confirm

Close

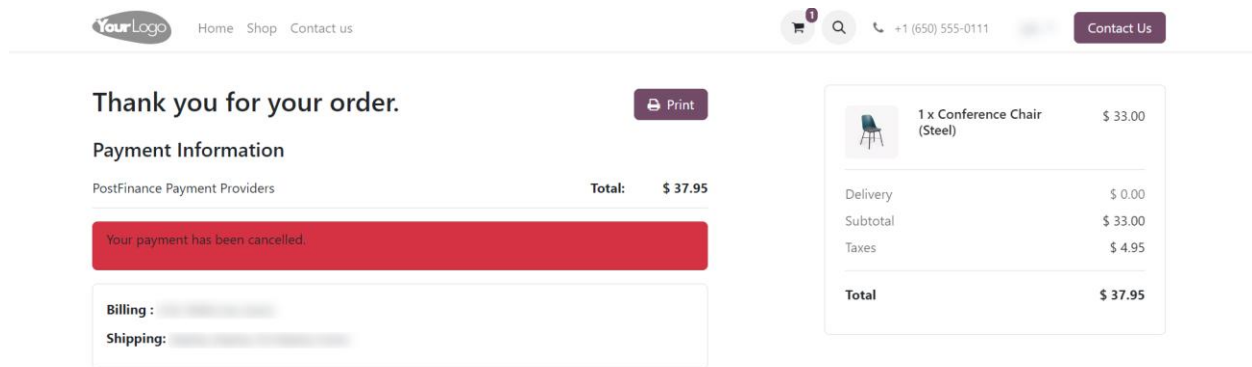
*Screenshot 13: Onsite payment using I-frame for Credit/Debit Card payment method*



*Screenshot 14: Offsite payment using TWINT payment method*

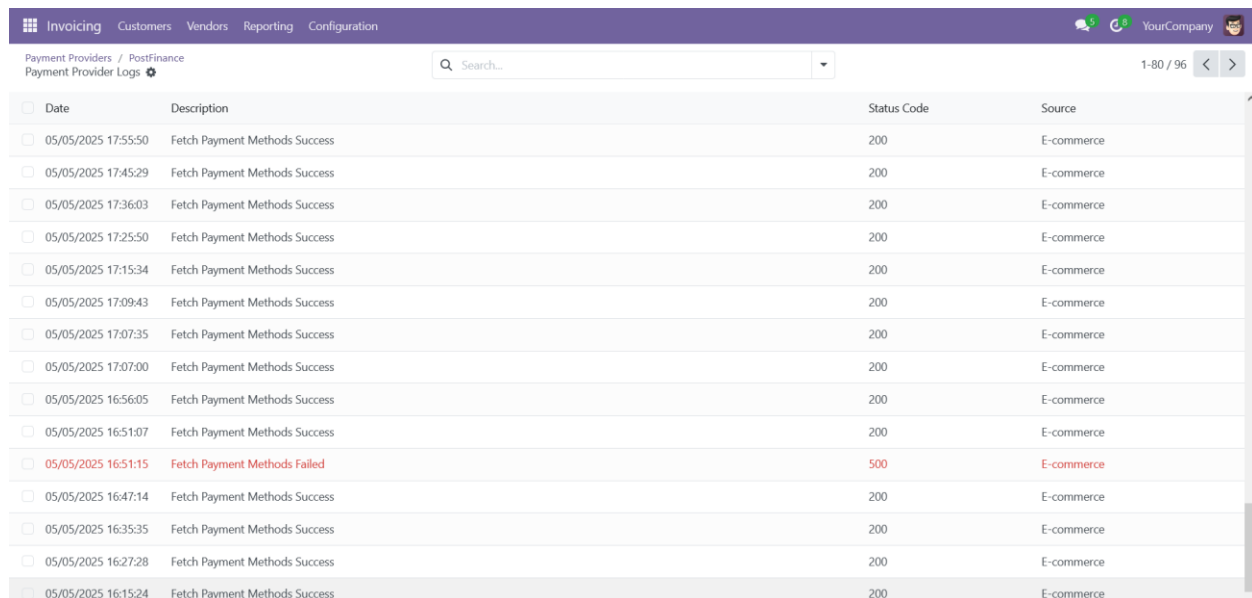


*Screenshot 15: Payment success page*



*Screenshot 16: Payment Cancel Page*

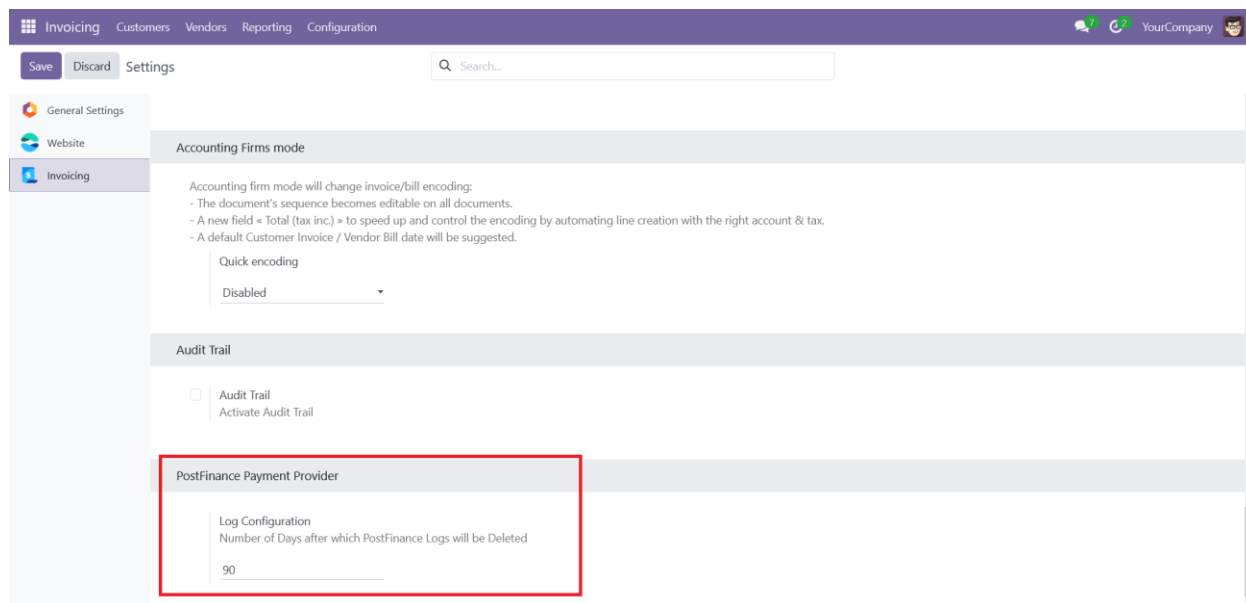
- Go to *Invoicing* -> *Payment Providers* -> Open *PostFinance Payment Provider*.
- Click on *PostFinance Logging*.
- There is a configuration in the *Invoice Settings* to automatically delete logs after a specified number of days.



The screenshot shows the 'PostFinance Log History' table in the Odoo interface. The table has columns for 'Date', 'Description', 'Status Code', and 'Source'. The logs show a series of 'Fetch Payment Methods Success' entries with status code 200, followed by one 'Fetch Payment Methods Failed' entry with status code 500, and then more 'Fetch Payment Methods Success' entries with status code 200.

Date	Description	Status Code	Source
05/05/2025 17:55:50	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:45:29	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:36:03	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:25:50	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:15:34	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:09:43	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:07:35	Fetch Payment Methods Success	200	E-commerce
05/05/2025 17:07:00	Fetch Payment Methods Success	200	E-commerce
05/05/2025 16:56:05	Fetch Payment Methods Success	200	E-commerce
05/05/2025 16:51:07	Fetch Payment Methods Success	200	E-commerce
05/05/2025 16:51:15	Fetch Payment Methods Failed	500	E-commerce
05/05/2025 16:47:14	Fetch Payment Methods Success	200	E-commerce
05/05/2025 16:35:35	Fetch Payment Methods Success	200	E-commerce
05/05/2025 16:27:28	Fetch Payment Methods Success	200	E-commerce
05/05/2025 16:15:24	Fetch Payment Methods Success	200	E-commerce

*Screenshot 17: PostFinance Log History*



*Screenshot 18: PostFinance Log Configuration*

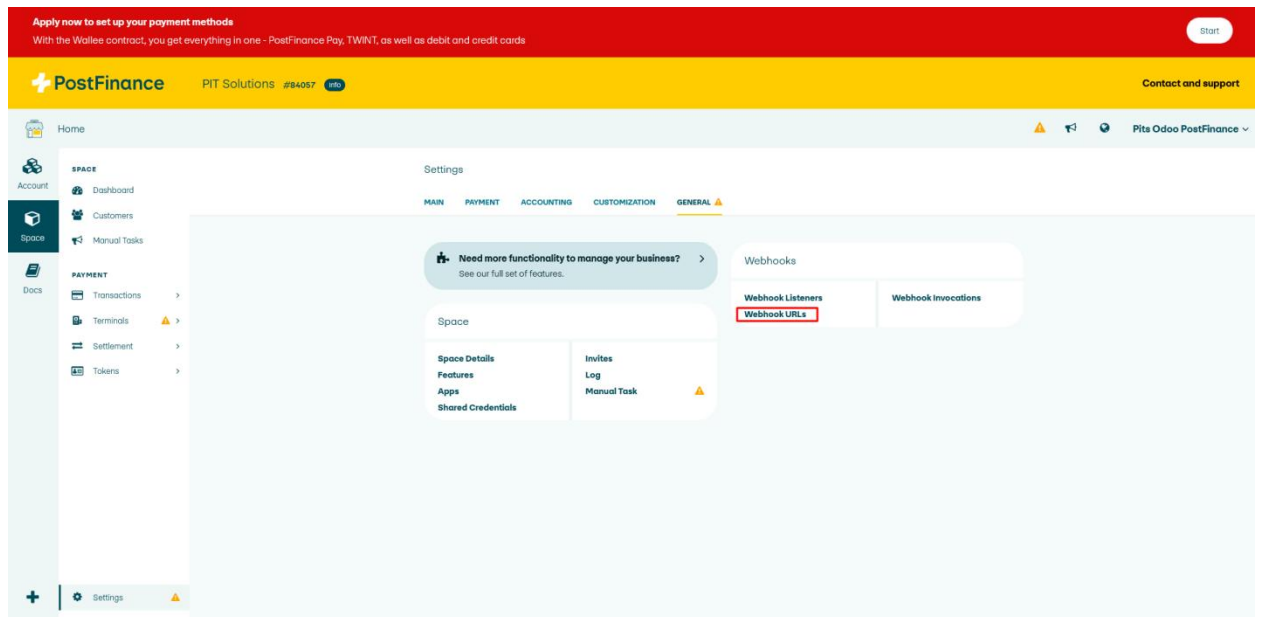
#### 4. Postfinance Webhook Configuration

To ensure that transaction status updates are correctly delivered to Odoo, our payment provider module uses a dedicated webhook listener. This listener receives asynchronous notifications directly from PostFinance whenever a transaction changes its state (e.g., *Authorized*, *Completed*, *Failed*, etc.).

Follow the steps below to configure the Webhook URL and Webhook Listener in the PostFinance Back Office.

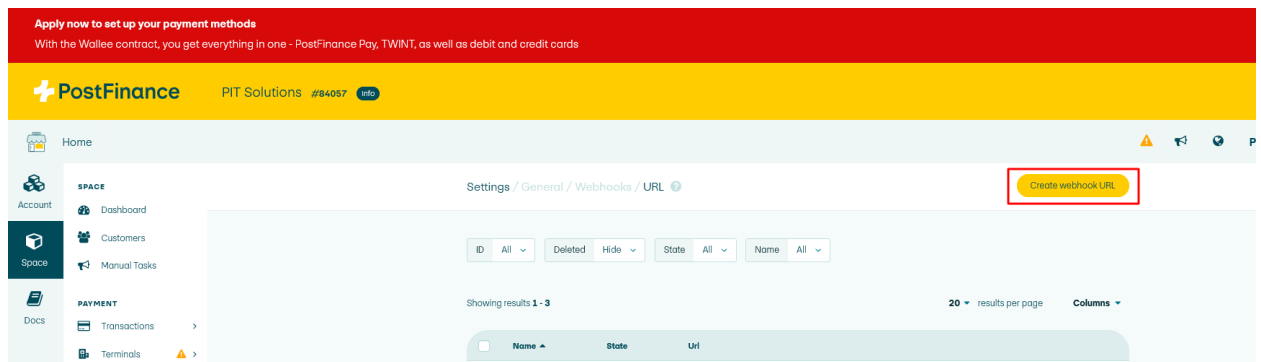
- Go to <https://checkout.postfinance.ch/> -> Login.
- Navigate to *Space* -> select your space -> *Settings* -> *GENERAL* -> *Webhook URLs*.





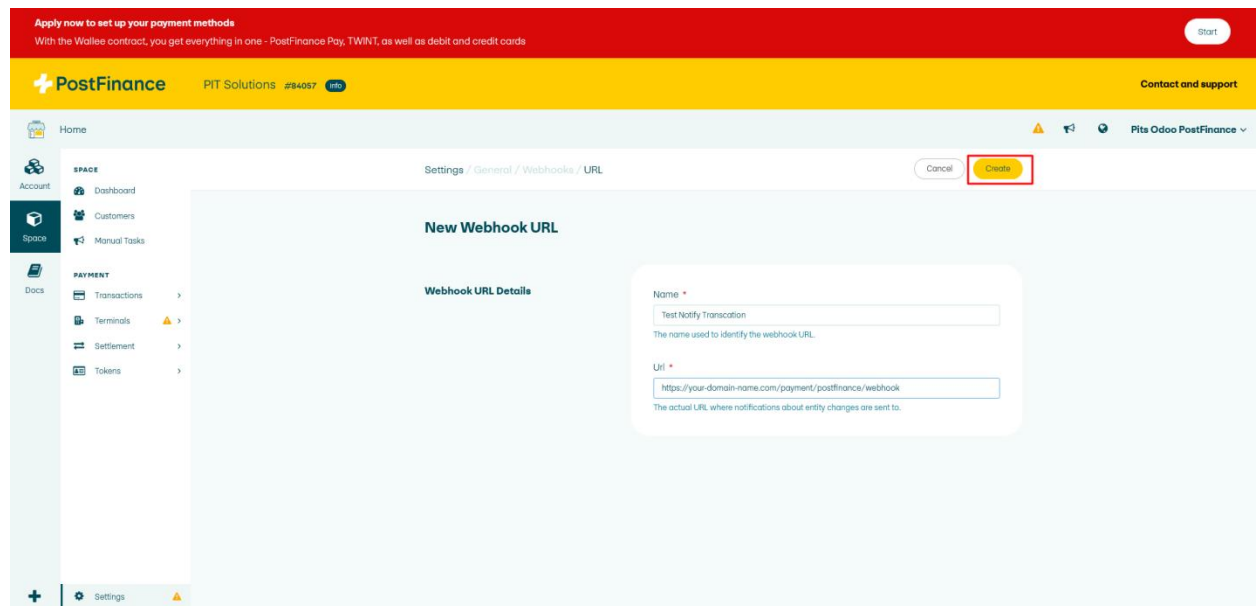
*Screenshot 19: PostFinance Space Settings webhook URLs*

Click -> *Create webhook URL*



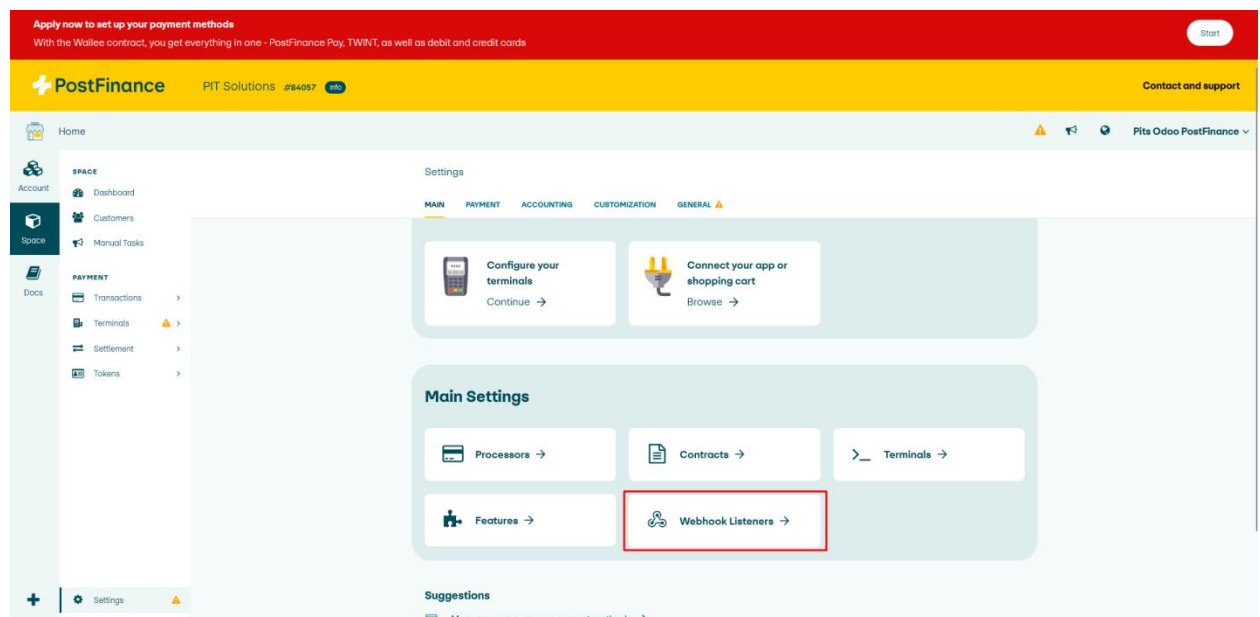
*Screenshot 20: PostFinance Create webhook URLs*

- Add New Webhook URL then click *Create* button.



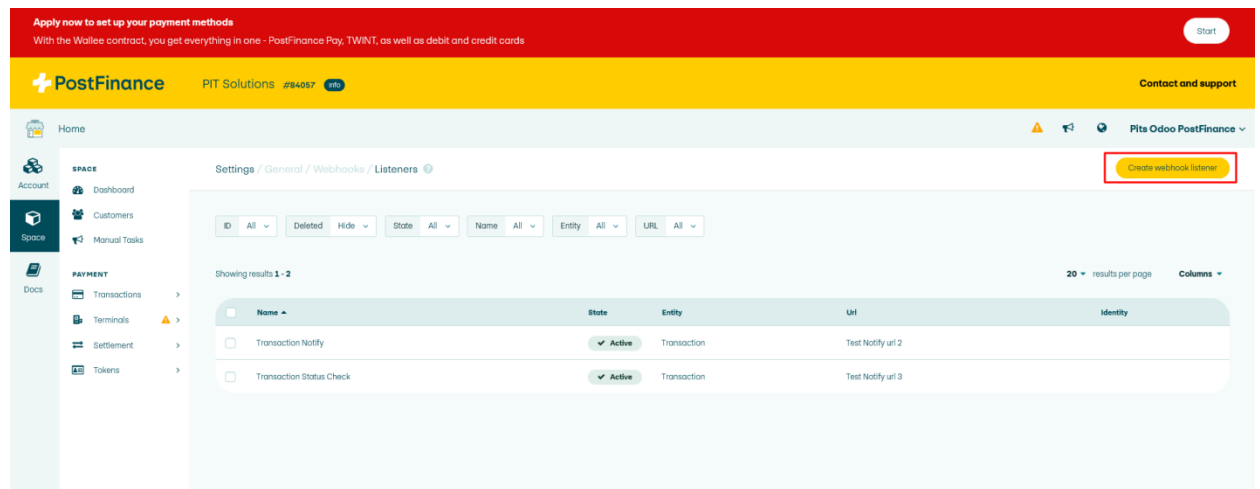
*Screenshot 21: PostFinance New Webhook URL*

- Navigate to Settings -> MAIN -> Webhook Listeners.



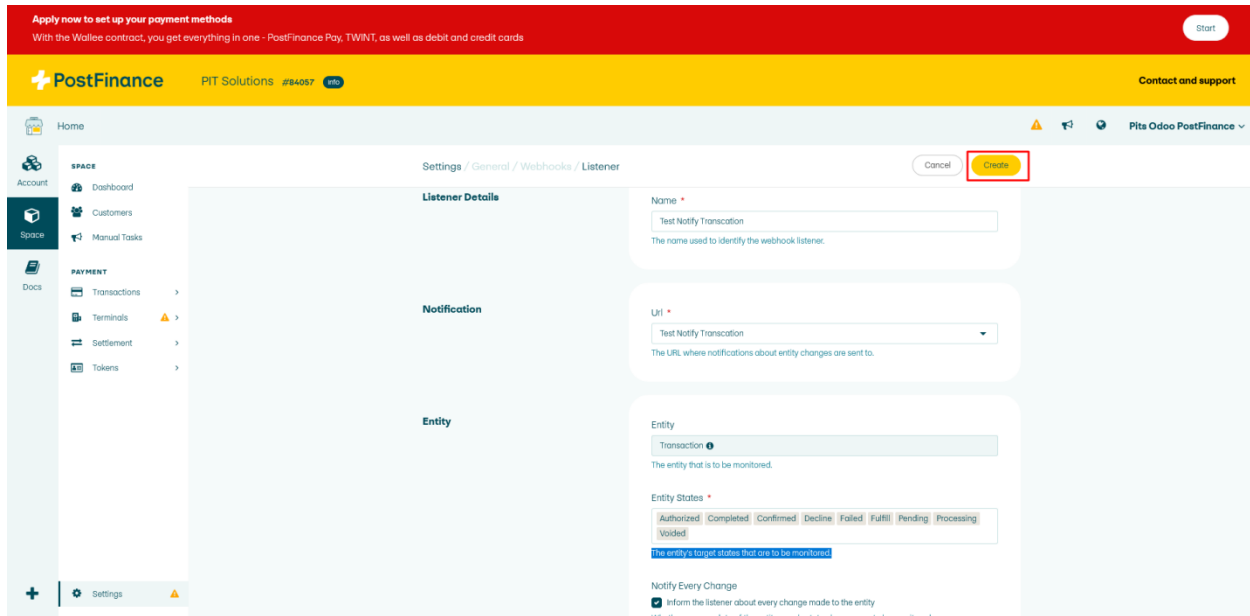
*Screenshot 22: PostFinance New Webhook Listener*

- Create webhook listener



*Screenshot 23: PostFinance Create Webhook Listener*

- Create New Webhook Listener.
  - Select Entity - **Transaction**
  - **Name** - The name used to identify the webhook listener. E.g.: *Test Notify Transaction*
  - **URL** - Select your Created Webhook URL E.g.: *Screenshot 21*
  - **Entity** - The entity's target states that are to be monitored.
- Click **Create** button.



Apply now to set up your payment methods  
With the Wallie contract, you get everything in one - PostFinance Pay, TWINT, as well as debit and credit cards

Start

PostFinance PIT Solutions #B4057

Contact and support

Home

Account

SPACE

- Dashboard
- Customers
- Manual Tasks

SPACE

Doc

PAYMENT

- Transactions
- Terminals
- Settlement
- Tokens

Settings

Settings / General / Webhooks / Listener

Cancel Create

Listener Details

Name \*

Test Notify Transaction

The name used to identify the webhook listener.

Notification

Url \*

Test Notify Transaction

The URL, where notifications about entity changes are sent to.

Entity

Entity

Transaction

The entity that is to be monitored.

Entity States \*

Authorized Completed Confirmed Decline Failed Fulfill Pending Processing

Voided

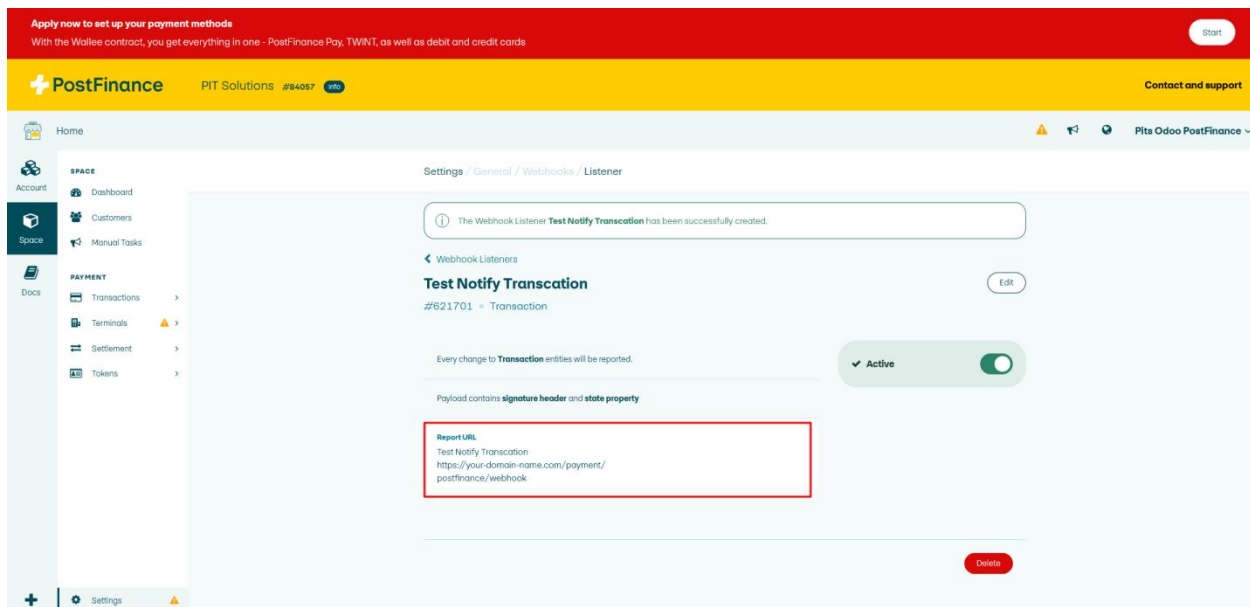
The entity's target states that are to be monitored.

Notify Every Change

☒ Inform the listener about every change made to the entity

Whether any contents of the entity or only state changes are to be monitored

Screenshot 24: PostFinance Webhook Listener Interface



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With the Wallie contract, you get everything in one - PostFinance Pay, TWINT, as well as debit and credit cards

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- Transactions
- Terminals
- Settlement
- Tokens

Settings

Settings / General / Webhooks / Listener

The Webhook Listener Test Notify Transaction has been successfully created.

Webhook Listeners

Test Notify Transaction

#621701 = Transaction

Every change to Transaction entities will be reported.

Payload contains signature header and state property

Report URL:

Test Notify Transaction

https://your-domain-name.com/payment/postfinance/webhook

Active

Delete

Screenshot 25: PostFinance Created Webhook Listener

## 5. Brief description

For the smooth functioning of this plugin, a few backend configurations need to be set up. The initial step involves configuring the **PostFinance Acquirer**, where the **User ID**, **Space ID**, and **Application Key** from your PostFinance Flex account must be provided. Once this configuration is completed, activate the provider, and users can proceed with shopping. The PostFinance Flex payment methods will then appear on the shop's payment page.

Customers can select their preferred **PostFinance payment method**, pay via the payment page or popup window, and then return to the Odoo Webshop.

### Step-by-Step Instructions

**Prerequisites:** Before integrating the PostFinance payment acquirer plugin, ensure that you have a PostFinance account. You can create one at <https://checkout.postfinance.ch/> which facilitates easy verification and transaction processing.

**Step 1:** Set Up PostFinance Account and Configure Payment Acquirer.

- Enter your **User ID**, **Space ID**, and **Application Key** from your PostFinance Flex account.

**Step 2:** Activate/Publish/Enable the PostFinance Payment Provider.

**Step 3:** Navigate to the e-commerce website -> Add products to the cart -> Proceed to checkout.

**Step 4:** Select the **PostFinance Flex** payment method and click **Pay Now**.

**Step 5:** Complete the transaction by entering the necessary details on the payment page or in the popup window.

**Step 6:** Once the payment is successful, the order will be placed.

## 6. Installation Requirements

This plugin requires the official **PostFinance Python SDK** to establish communication with PostFinance's payment services. Follow the steps below to install the necessary dependencies:

### Installation Steps:

#### 1. Install Dependencies

Run the following command using the provided requirements.txt file:

- `pip install -r payment_postfinance_flex/requirements.txt`

#### 2. Verify Python Environment

Ensure the command is executed within the same Python environment that your Odoo instance is using.

#### 3. Restart Odoo

Once the installation is complete, restart the Odoo service to ensure all modules and SDK classes are properly loaded.

## 7. Technical Requirements / Compatibility

- **Required Odoo Modules:**

- Sales
- Payment
- Website

- **External Python Dependencies:**

- cairosvg version **2.7.0**
- postfinancecheckout version **5.1.0**

- **Odoo Compatibility:**

- Fully compatible with **Odoo 18.0**, both **Community** and **Enterprise** editions.

## 8. Limitations

- **Cryptocurrency Payment Unavailable:** Please be aware that cryptocurrency payments powered by PostFinance are currently not supported. This limitation is due to PostFinance and is outside of our control. We recommend using alternative supported payment methods to complete your transaction.

## 9. Changes Log / Release Notes

- Version 5.0.0: November 2025
  - Refined plugin capability to receive instant payment notifications from the payment gateway.
- Version 4.0.0: November 2025
  - Introduced support for PostFinance Tokenization and One-Click Payments to streamline secure checkout and enhance customer convenience.
- Version 3.0.0: May 2025
  - Refactored the integration to use the official PostFinance SDK, replacing direct API calls.
  - Enhanced error handling and implemented security improvements.
- Version 2.0.0: February 2025
  - Refinement of payment transaction logging feature.
- Version 1.0.0: October 2024
  - Initial release.

## 10. Support

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