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## User Manual

# PostFinance Checkout Flex Payment Plugin for Odoo v19.0

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## Table of Contents

1. Introduction.....	3
2. Features .....	3
3. Installation .....	4
4. Working of the Plugin.....	4
5. Postfinance Webhook Configuration .....	14
6. Brief description.....	18
7. Technical Requirements / Compatibility .....	19
8. Limitations.....	20
9. Changes Log / Release Notes .....	20
10. Support .....	20

## 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. Installation

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.

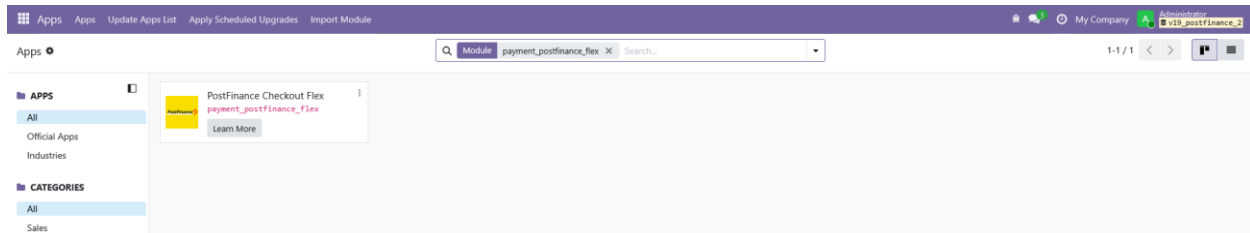
##### 3. Restart Odoo

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

### 4. Working of the Plugin

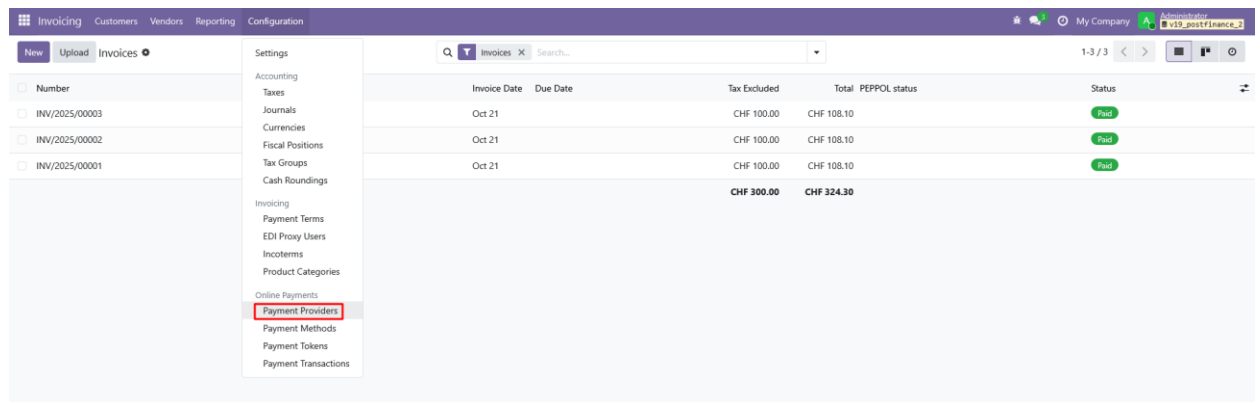
Install the PostFinance module:

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



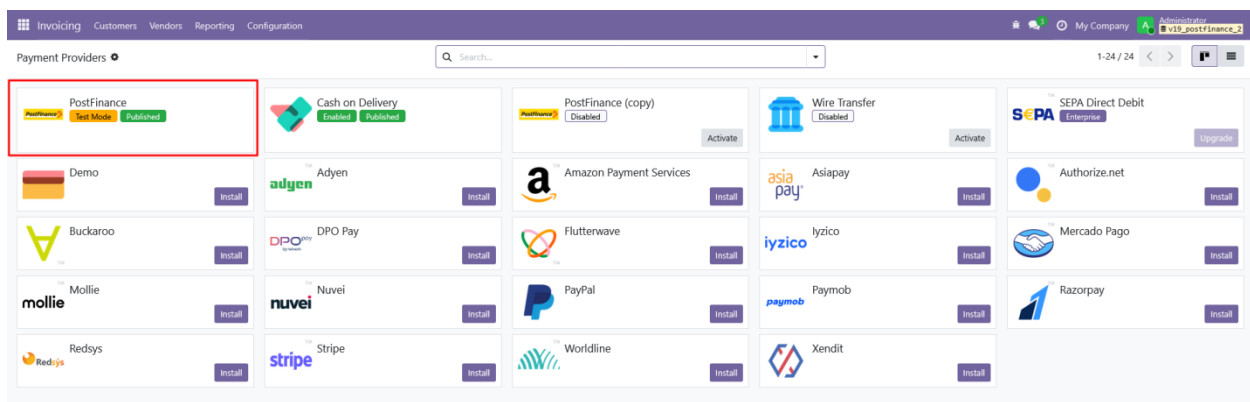
*Screenshot 1: PostFinance app activation*

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



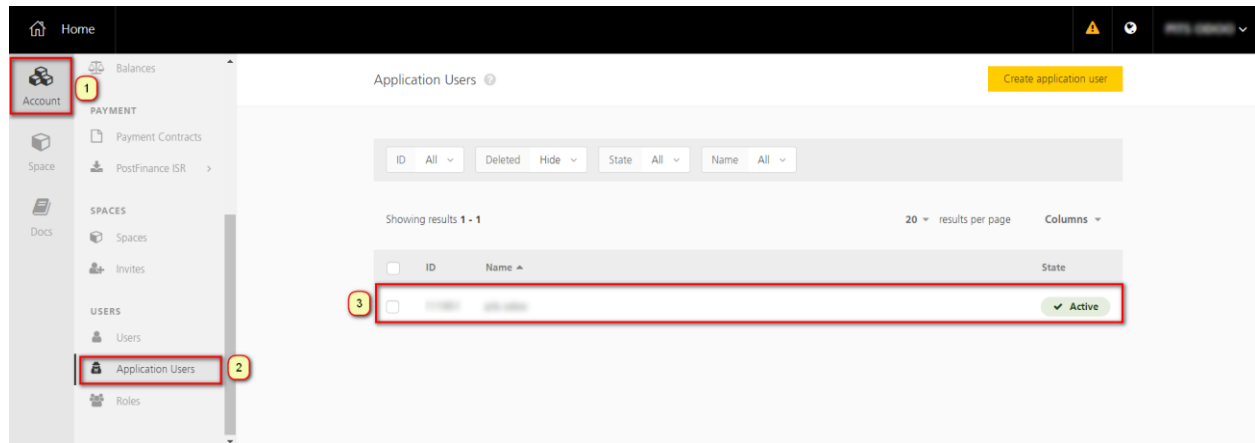
*Screenshot 2: Payment Providers menu item*

- Click on *PostFinance Payment Providers*.



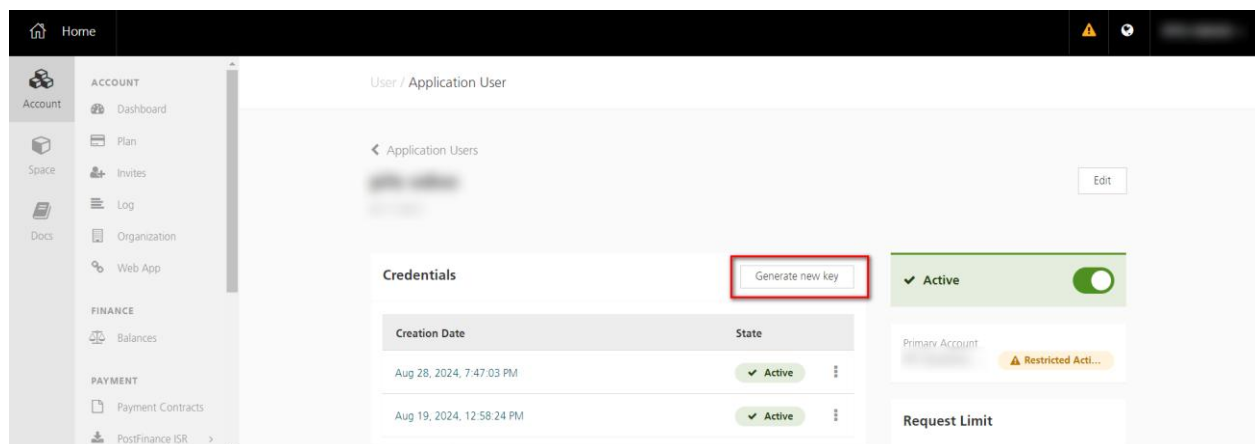
*Screenshot 3: PostFinance Payment Provider*

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



*Screenshot 4: PostFinance Account Page*

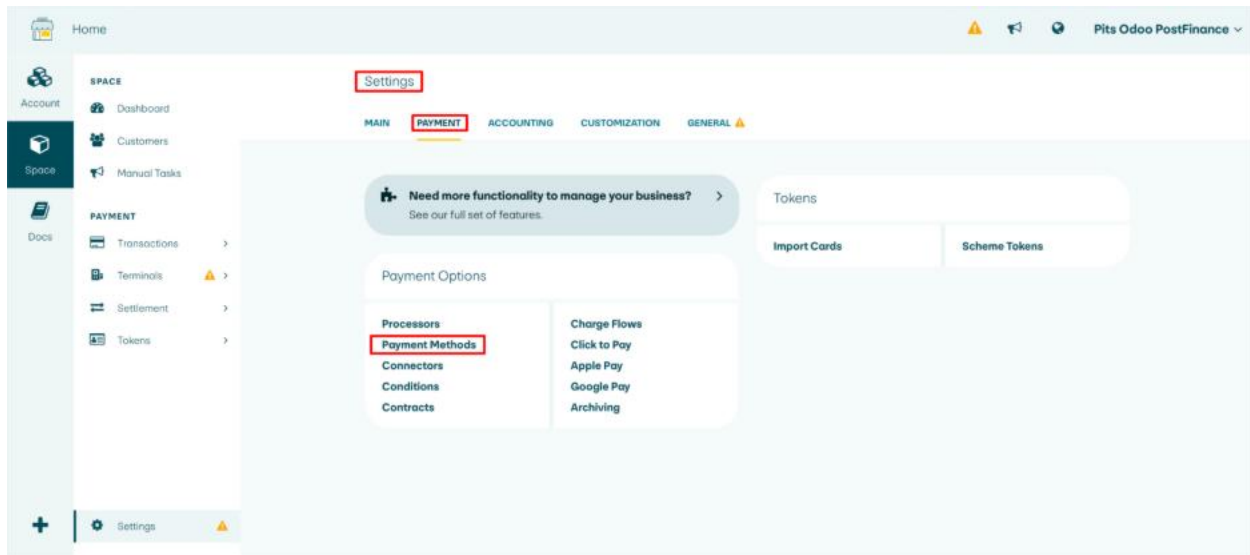
- Generate new key -> Copy the generated key.



*Screenshot 5: PostFinance New key Generation*

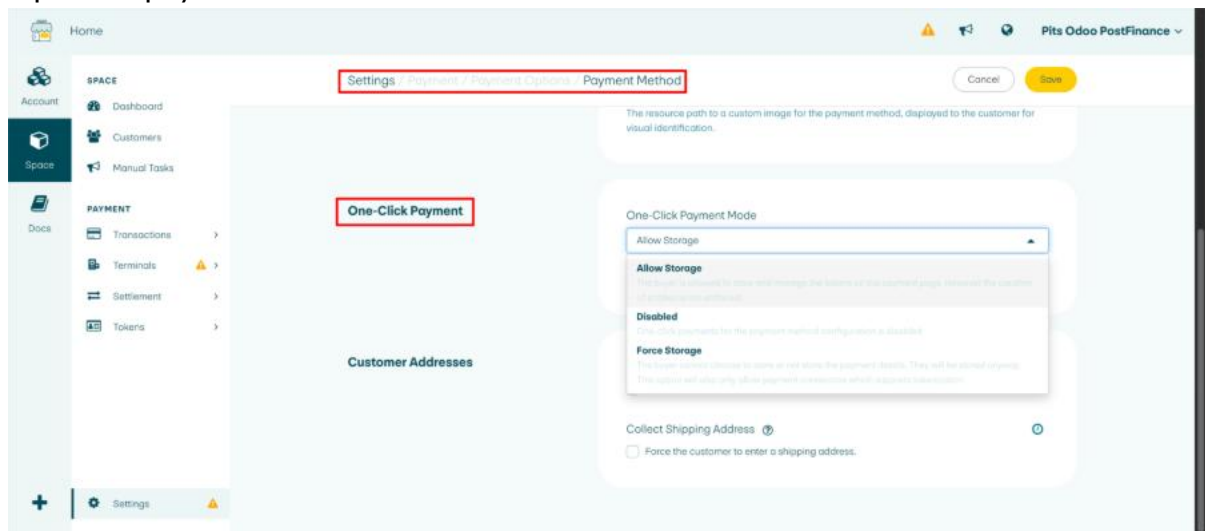
- Go to *Spaces*-> Fetch the *Space ID*.
- Enter the *Rest API UserID*, *Rest API Space ID* and *Application Key* to PostFinance payment provider configuration in Odoo backend.
- Move the payment provider to desired state and publish the provider.

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



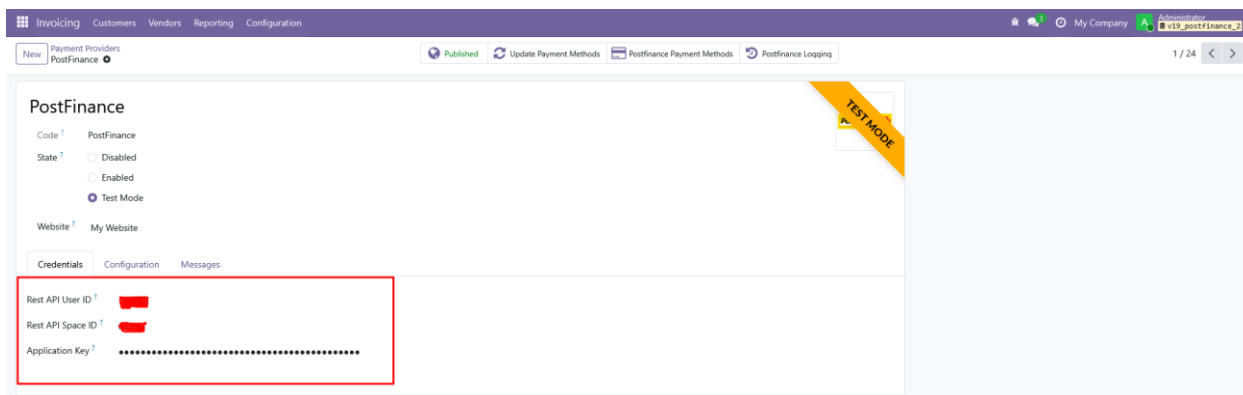
*Screenshot 6: PostFinance Open Payment Methods*

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



*Screenshot 7: PostFinance Open Payment Methods*

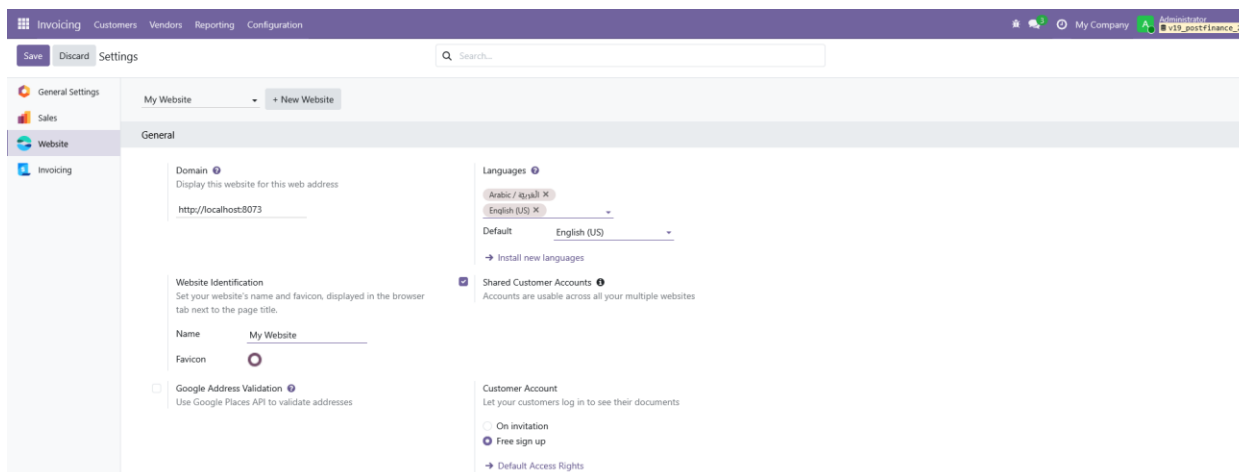
- Choose the appropriate option as required.



*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.**

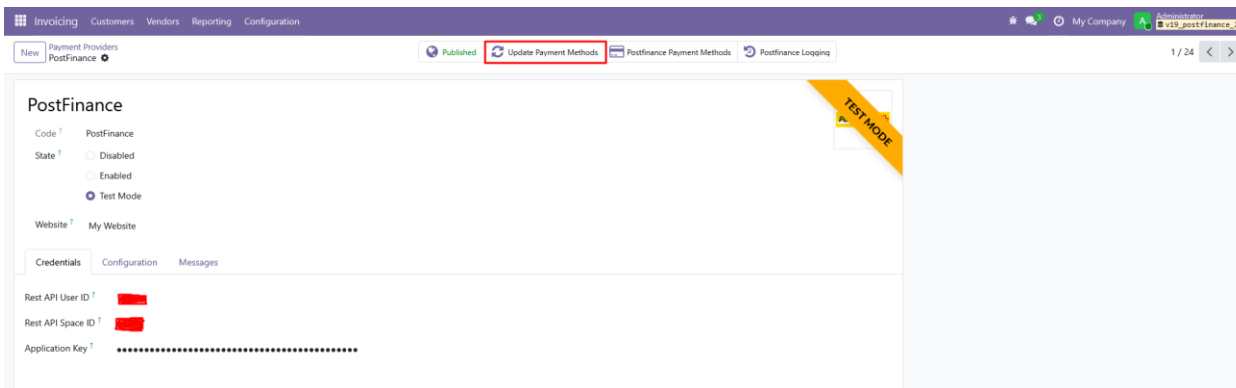
- Navigate to *Website > Configuration > Settings* to create and configure websites as per the requirement.



*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.

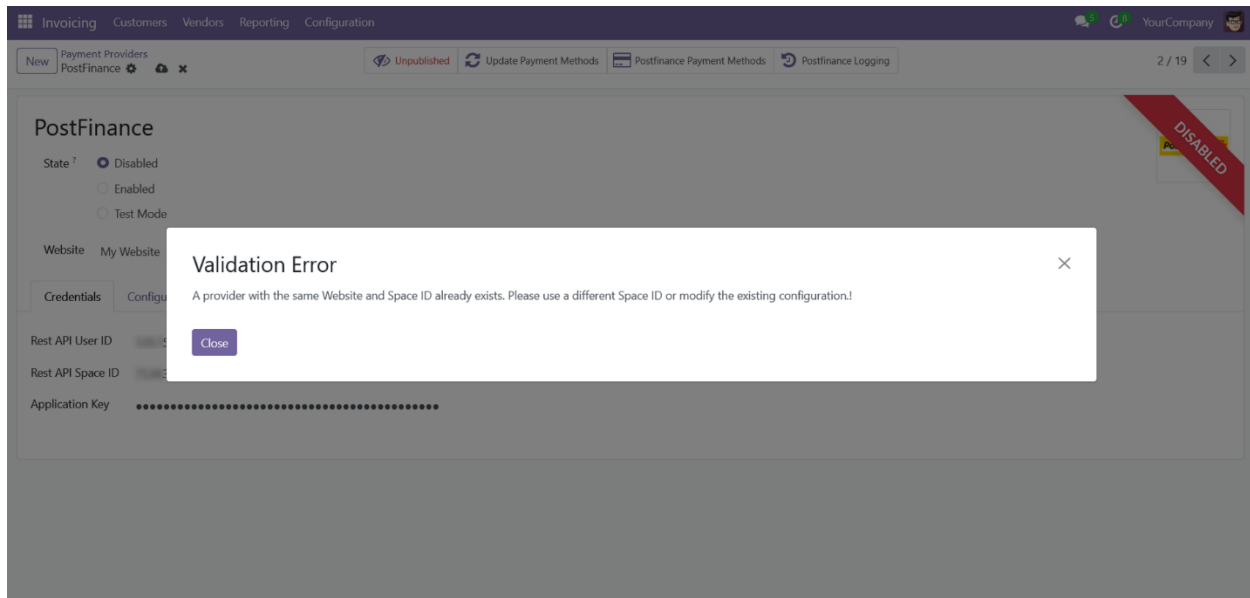




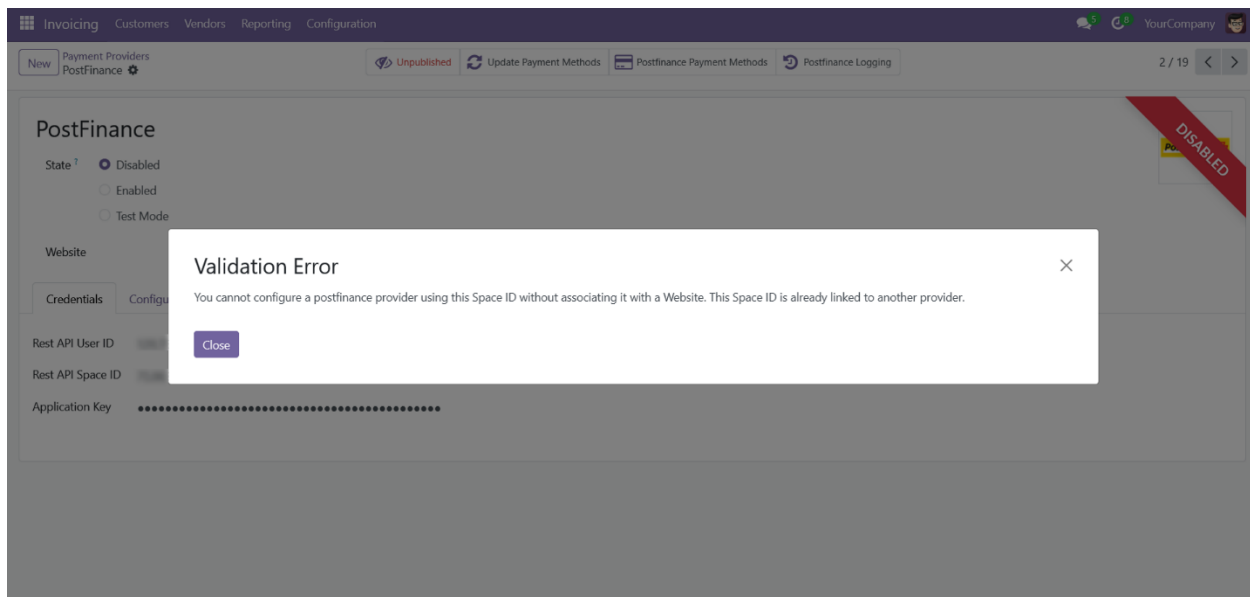
*Screenshot 10: PostFinance Update Payment Methods*

- 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*.

Order > Address > Payment

Payment method 

<input type="radio"/> Credit / Debit Card 	
<input type="radio"/> Credit/Debit Add-On - Onsite 	
<input type="radio"/> PayPal 	
<input type="radio"/> PostFinance Card 	
<input type="radio"/> PostFinance Card 	
<input type="radio"/> PostFinance E-Finance 	
<input type="radio"/> PostFinance Pay 	
<input type="radio"/> TWINT 	


**Delivery & Billing** 

**Administrator**  
muk  
89767 cux  
Switzerland


1 Test Product	CHF 100.00
Delivery	CHF 0.00
Subtotal	CHF 100.00
Taxes	CHF 8.10
<b>Total</b>	<b>CHF 108.10</b>
Discount code...	<input type="button" value="Apply"/>
<input type="button" value="Pay now"/>	
or	
<a href="#">&lt; Back to address</a>	


*Screenshot 12: Process Checkout Page*


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


Your Logo Home Shop Contact us  +1 555-555-5556 English (US) Administrator Contact Us


Order > Address > Payment


Payment method 


☒ Credit / Debit Card 


☐ Credit/Debit Add-On - Onsite 


☐ PayPal 

☐ PostFinance Card 

☐ PostFinance Card 

☐ PostFinance E-Finance 

☐ PostFinance Pay 


☐ TWINT 

**Delivery & Billing**

**Administrator**  
muk  
89767 cux  
Switzerland

Powered By PostFinance Interface

Simulation

 Pay

or use

Manually enter your card details:

Card Holder Name \*

Card Number \*

Expiry Date \*

MM / YY

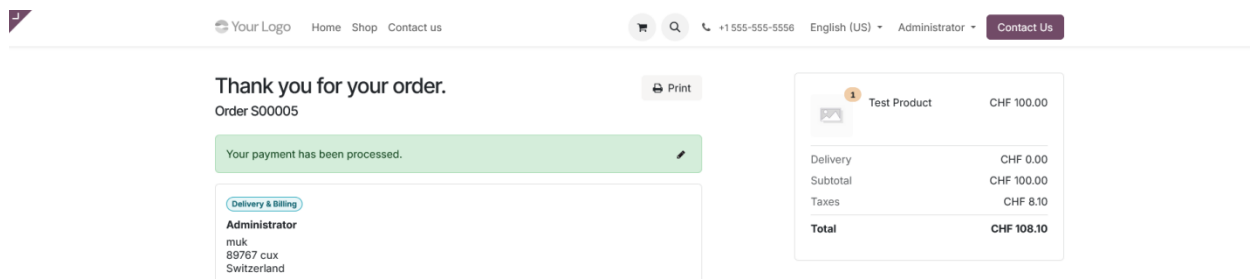
Security Code \*

Test Product	CHF 100.00
	CHF 0.00
	CHF 100.00
	CHF 8.10
<b>Total</b>	<b>CHF 108.10</b>
Discount code...	<input type="button" value="Apply"/>
<input type="button" value="Pay now"/>	
or	
<a href="#">&lt; Back to address</a>	

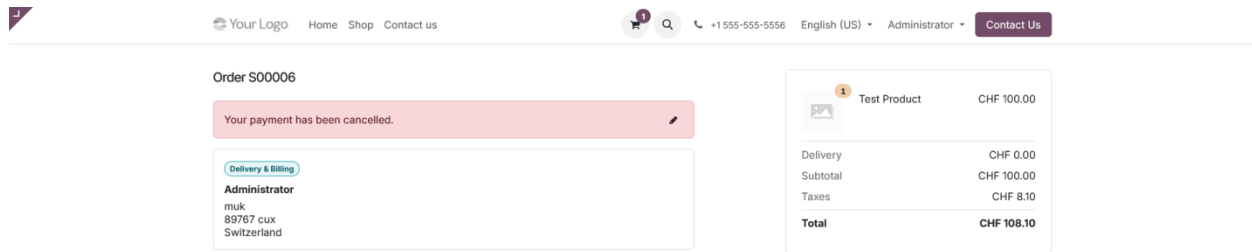
*Screenshot 13: Onsite payment using I-frame for Credit/Debit Card payment method*



*Screenshot 14: Offsite payment using TWINT payment method*

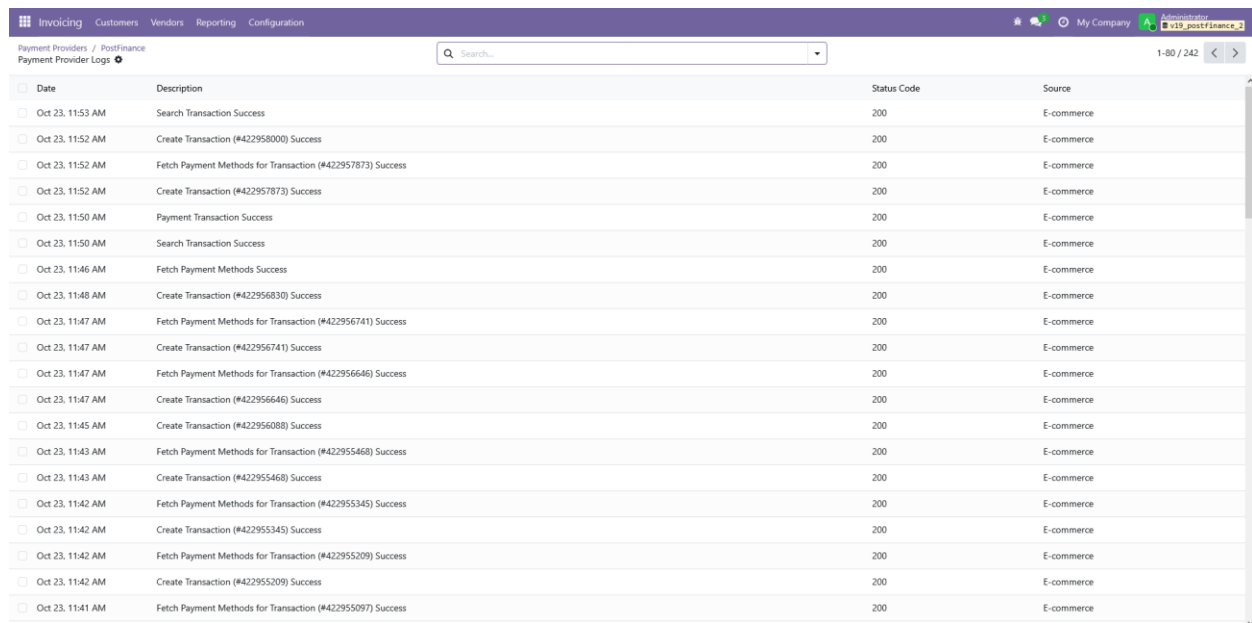


*Screenshot 15: Payment success page*



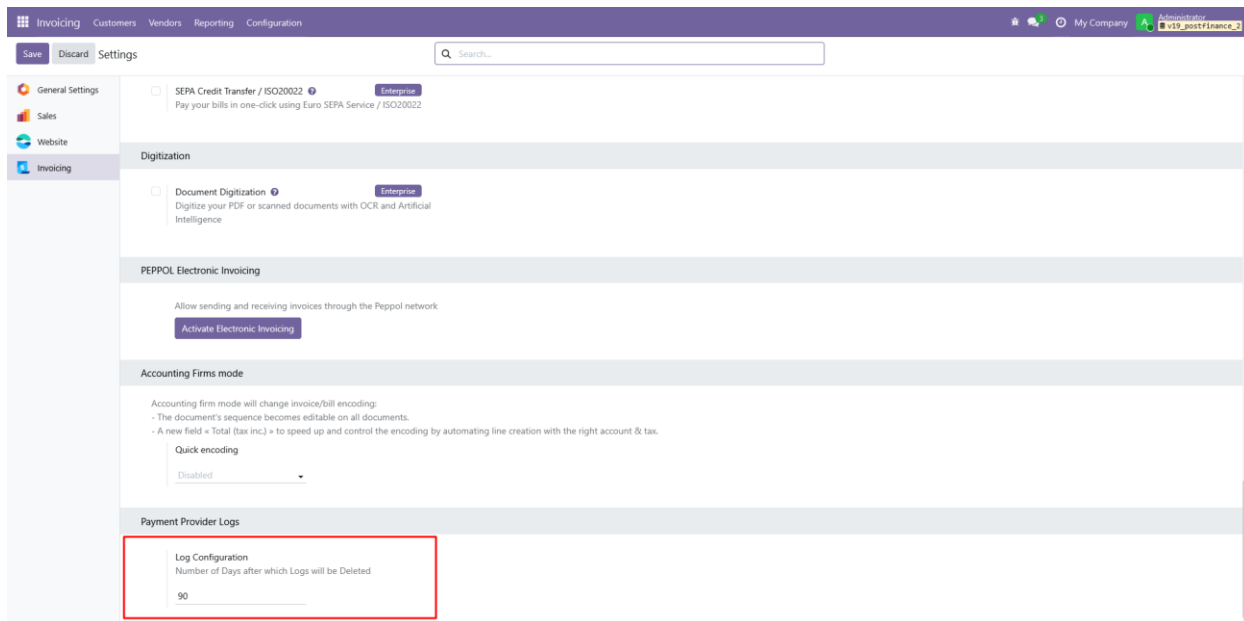
*Screenshot 16: Payment Cancel Page*

- 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.



Date	Description	Status Code	Source
Oct 23, 11:53 AM	Search Transaction Success	200	E-commerce
Oct 23, 11:52 AM	Create Transaction (#422958000) Success	200	E-commerce
Oct 23, 11:52 AM	Fetch Payment Methods for Transaction (#422957873) Success	200	E-commerce
Oct 23, 11:52 AM	Create Transaction (#422957873) Success	200	E-commerce
Oct 23, 11:50 AM	Payment Transaction Success	200	E-commerce
Oct 23, 11:50 AM	Search Transaction Success	200	E-commerce
Oct 23, 11:46 AM	Fetch Payment Methods Success	200	E-commerce
Oct 23, 11:48 AM	Create Transaction (#422956830) Success	200	E-commerce
Oct 23, 11:47 AM	Fetch Payment Methods for Transaction (#422956741) Success	200	E-commerce
Oct 23, 11:47 AM	Create Transaction (#422956741) Success	200	E-commerce
Oct 23, 11:47 AM	Fetch Payment Methods for Transaction (#422956646) Success	200	E-commerce
Oct 23, 11:47 AM	Create Transaction (#422956646) Success	200	E-commerce
Oct 23, 11:45 AM	Create Transaction (#422956088) Success	200	E-commerce
Oct 23, 11:43 AM	Fetch Payment Methods for Transaction (#422955468) Success	200	E-commerce
Oct 23, 11:43 AM	Create Transaction (#422955468) Success	200	E-commerce
Oct 23, 11:42 AM	Fetch Payment Methods for Transaction (#422955345) Success	200	E-commerce
Oct 23, 11:42 AM	Create Transaction (#422955345) Success	200	E-commerce
Oct 23, 11:42 AM	Fetch Payment Methods for Transaction (#422955209) Success	200	E-commerce
Oct 23, 11:42 AM	Create Transaction (#422955209) Success	200	E-commerce
Oct 23, 11:41 AM	Fetch Payment Methods for Transaction (#422955097) Success	200	E-commerce

*Screenshot 17: PostFinance Log History*



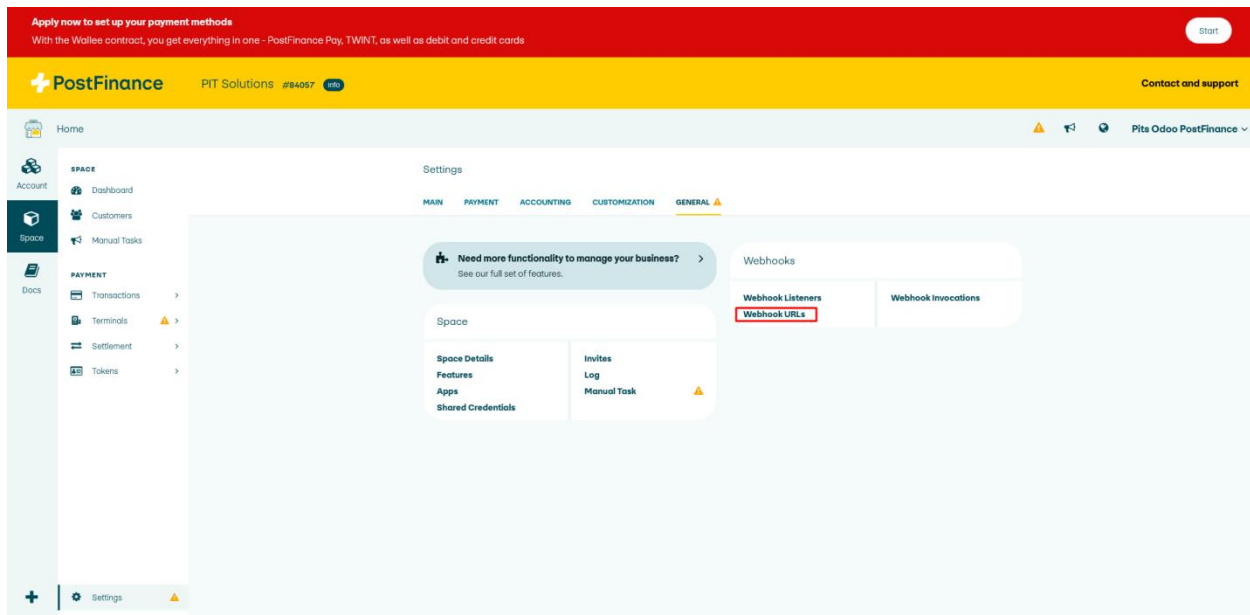
*Screenshot 18: PostFinance Log Configuration*

## 5. 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.).

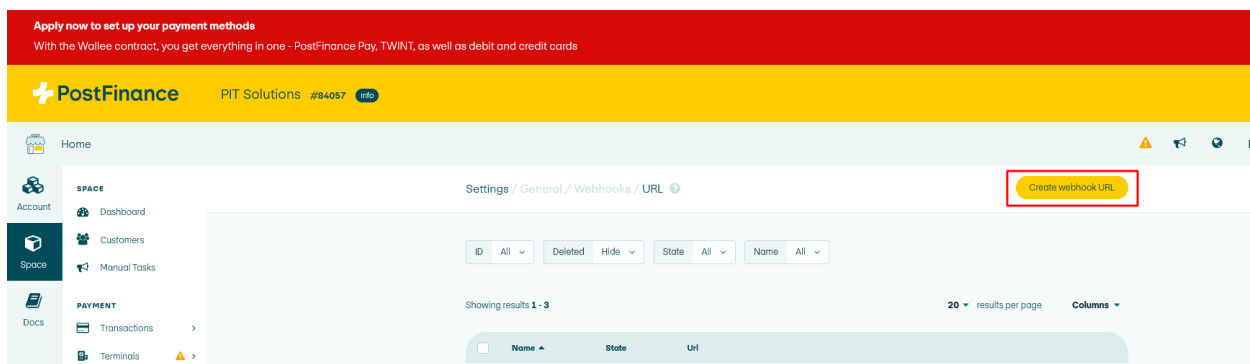
Follow the steps below to configure the Webhook URL and Webhook Listener in the PostFinance Back Office.

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



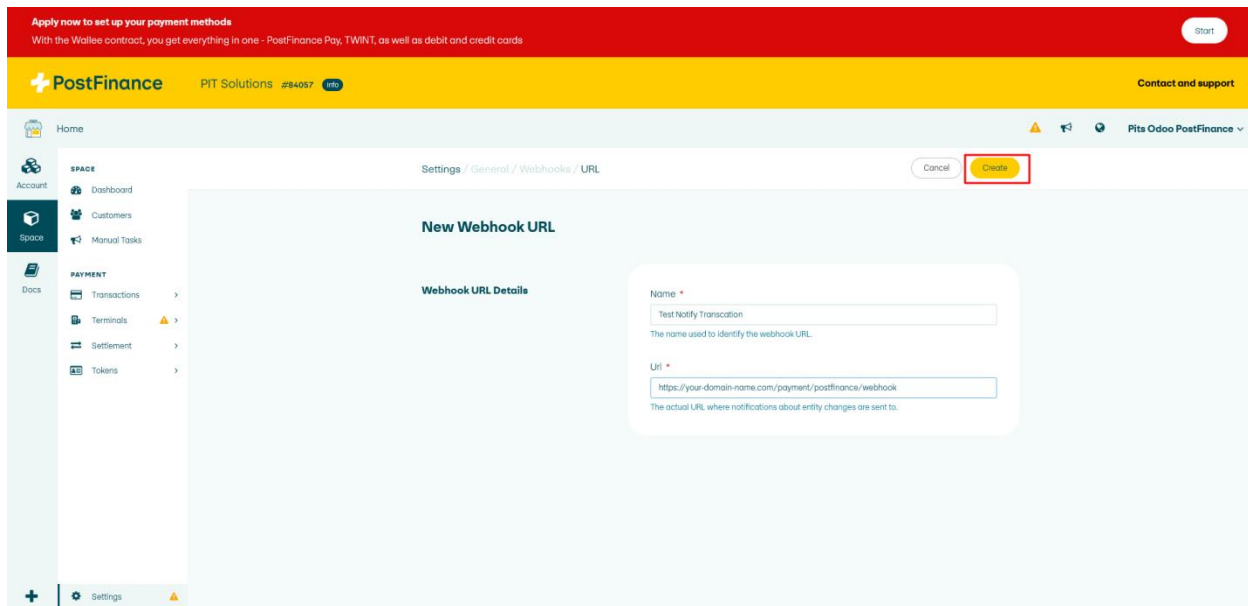
*Screenshot 19: PostFinance Space Settings webhook URLs*

- Click -> *Create webhook URL*



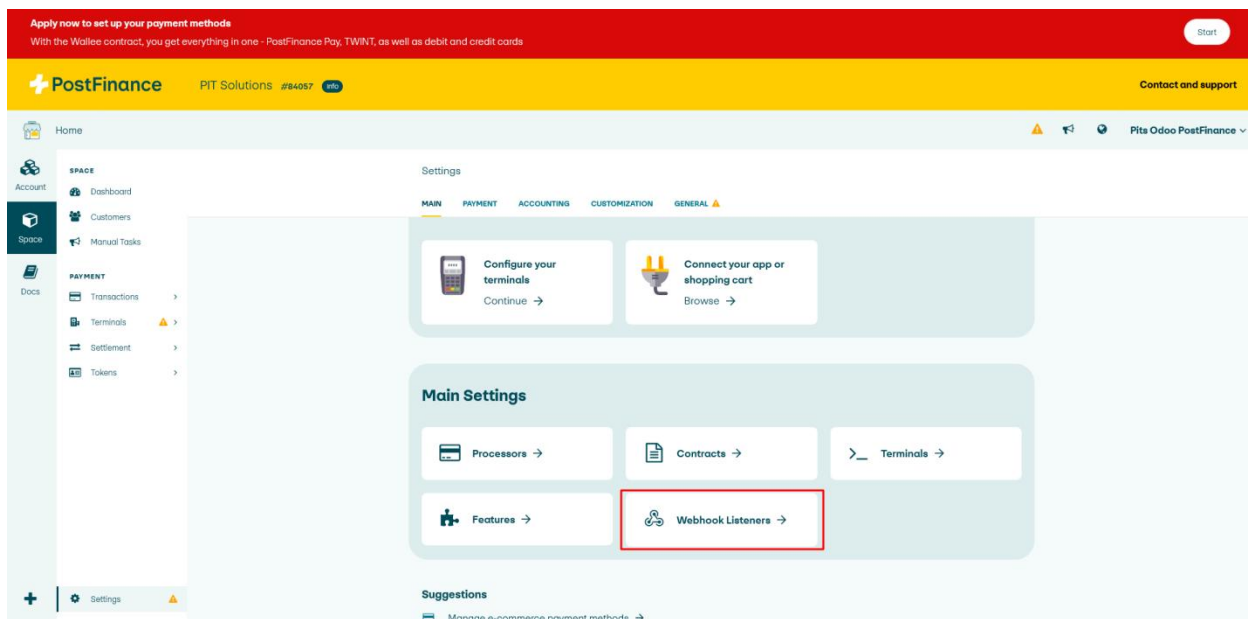
*Screenshot 20: PostFinance Create webhook URLs.*

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



*Screenshot 21: PostFinance New Webhook URL*

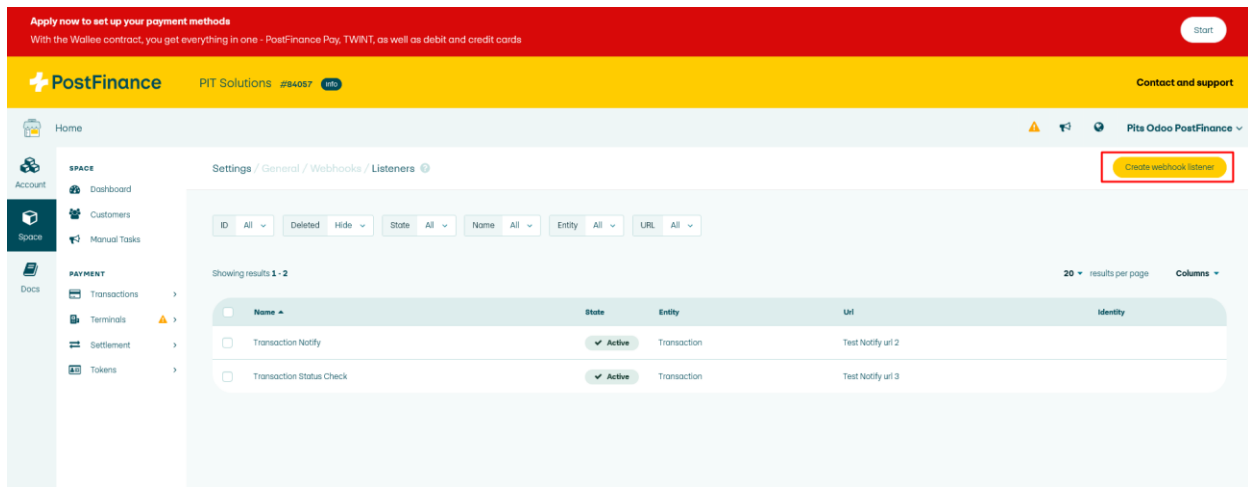
- Navigate to Settings -> MAIN -> Webhook Listeners.



*Screenshot 22: PostFinance New Webhook Listener*

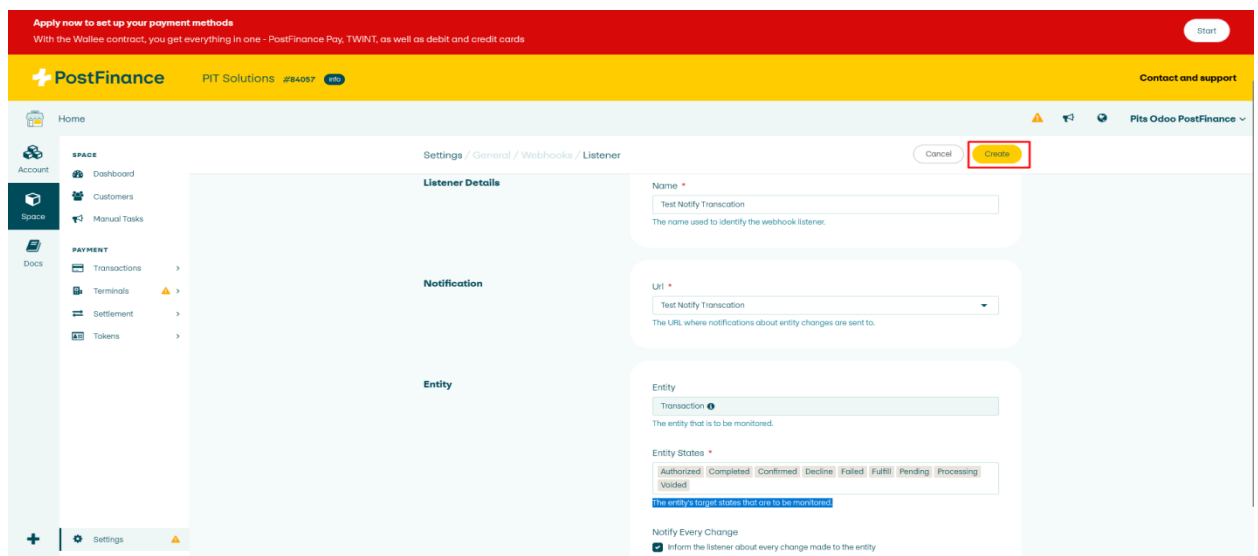


- Create Webhook Listener

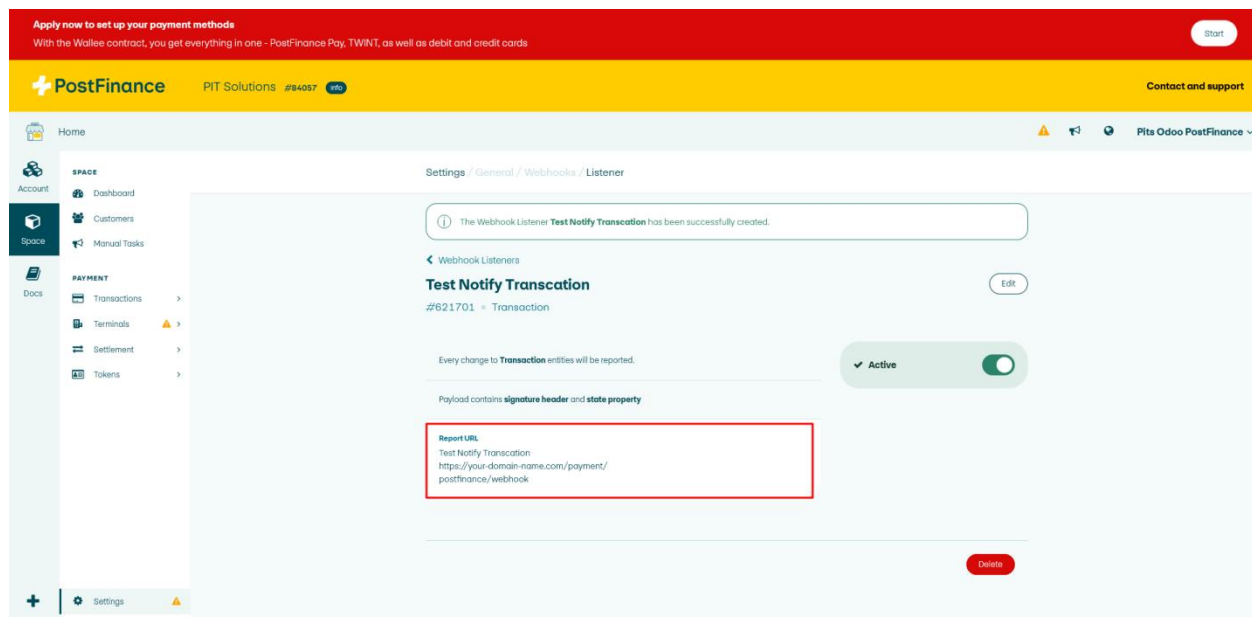


*Screenshot 23: PostFinance Create Webhook Listener*

- 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.



*Screenshot 24: PostFinance Webhook Listener Interface*



*Screenshot 25: PostFinance Created Webhook Listener.*

## 6. 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.

1. 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.

## 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 19.0**, 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 2.0.0: December 2025
  - Refined plugin capability to receive instant payment notifications from the payment gateway.
- Version 1.0.0: October 2025
  - 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).