

Direct Payments Settings



- [How it works?](#)
- [Connection](#)
- [Setting up payments in OT Box](#)
 - [Add payment methods](#)
 - [Set messages for customers](#)
 - [Edit fields of the form and error messages](#)
 - [Fields titles](#)
 - [Set number of paid order](#)
 - [Error messages](#)
 - [Opportunity to upload image](#)
- [Payment processing](#)
 - [Search for payment in general list](#)
 - [Confirm payment](#)
 - [View order and customer account](#)
 - [Cancel payment](#)

How it works?



Information

Consider work of the plugin on the example of payments through PayPal.

Contact OT technical support or your manager in Skype to add other methods of accepting payments to the list.

Your customer makes an order, draws it up and chooses PayPal, for example, at the payment stage.

The screenshot shows a 'PAYMENT' modal window with the following content:

- Order Order-0000000301**
- To pay: \$250**
- Payment method selection:
 - ☐ Cash
 - ☒ Payment in system
- ELECTRONIC WALLETS**
- PayPal logo and a **PAY** button (highlighted with a mouse cursor).
- A **CANCEL** button at the bottom right.

A page appears with a message about payment details after clicking "Pay" button. (All field titles and descriptions can be changed. See "Edit" block below).

Please send your order payment to Paypal by email at test@test.com

User full name	Ivanov Ivan Ivanovich
Purpose	Order payment Order-0000000301
Amount	\$250
Comment	
Upload file	Выберите файл Файл не выбран

SUBMIT

Your customer goes to PayPal (Online or through the terminal) and pays specified amount.

When payment is done he returns to the tab with this message. Before confirming payment, you can specify payment details and attach screenshot of the receipt.

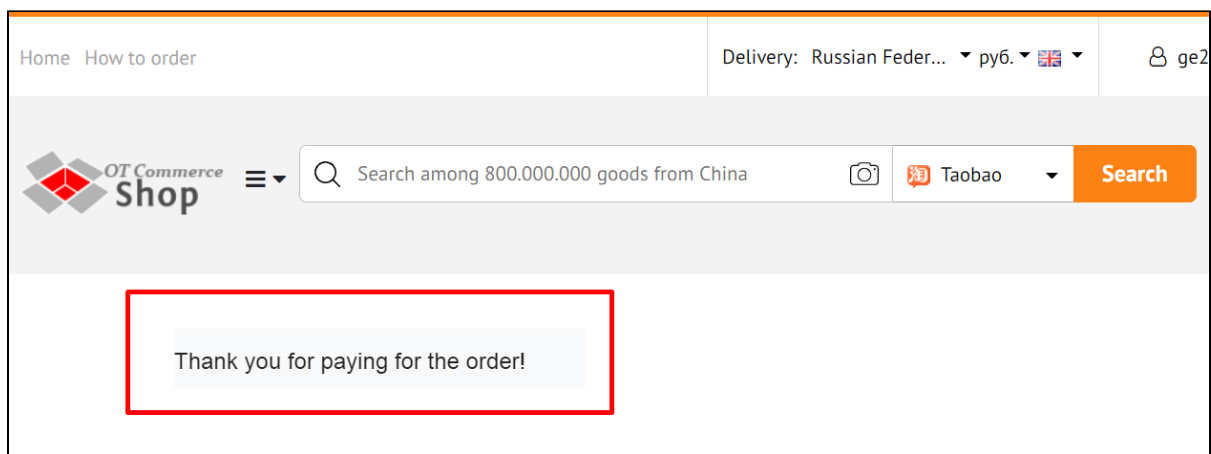
Click "Submit" to send payment data.

Please send your order payment to Paypal by email at test@test.com

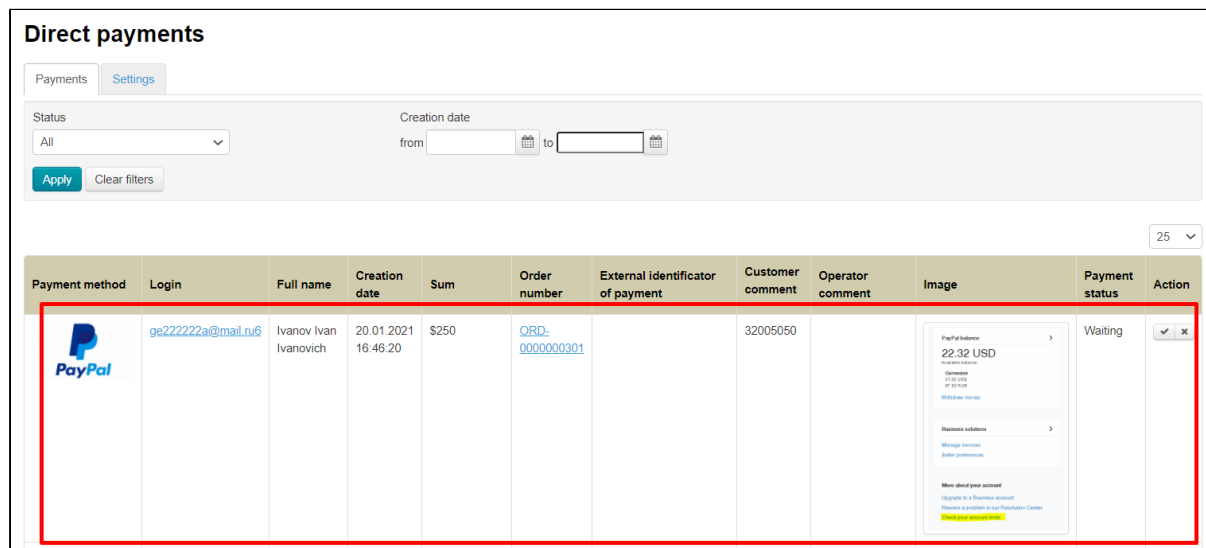
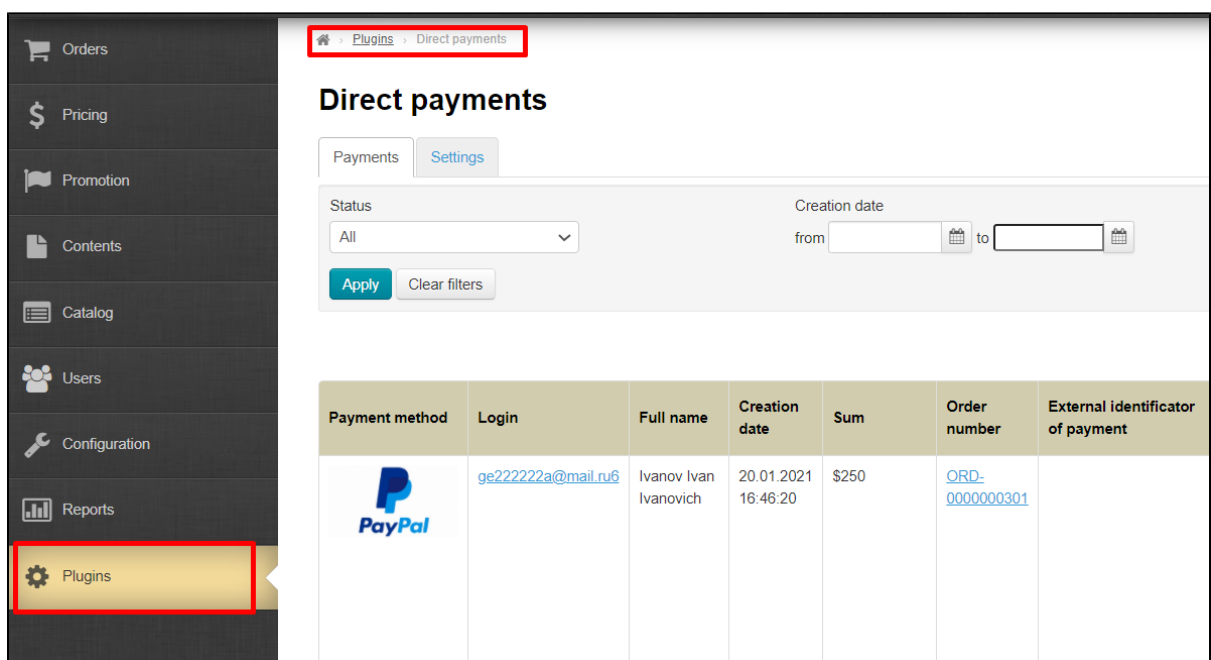
User full name	Ivanov Ivan Ivanovich
Purpose	Order payment Order-0000000301
Amount	\$250
Comment	
Upload file	Выберите файл Файл не выбран

SUBMIT

Customer will be see message after clicking "Confirm" button:



A record of made payment will appear in admin panel of OT Box.



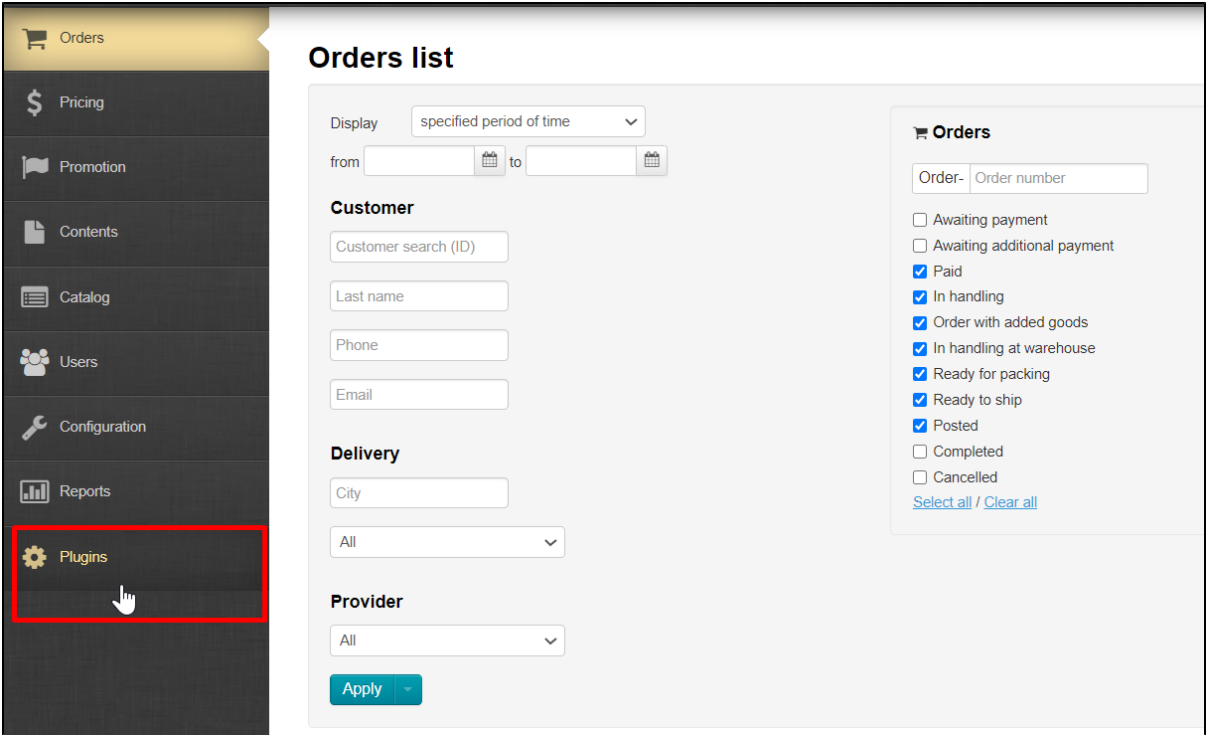
Log into PayPal personal account after that and find customer's payment or choose another way to make sure that money was deposited to your account. Confirm payment in admin panel of OT Box when payment is found and the order is paid.

Connection

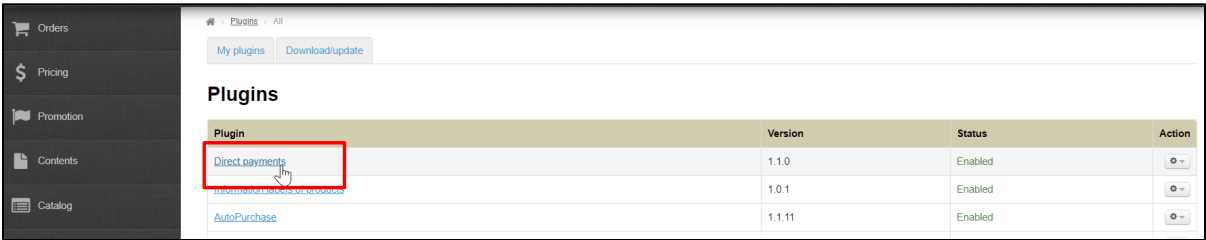
It is necessary to write a ticket to [technical support](#) for "Direct Payments" connection after purchase of this plugin.

Setting up payments in OT Box

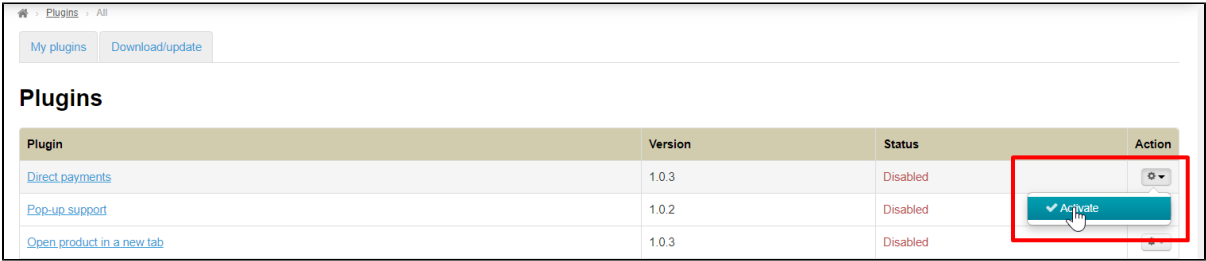
Go to admin panel after plugin connection and open "Plugins" section.



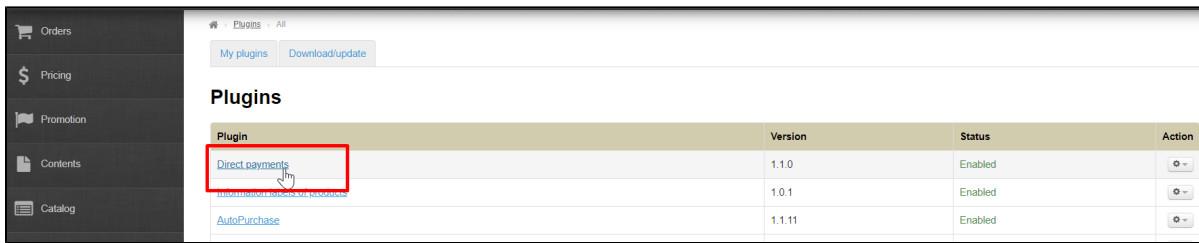
Choose "Direct Payments" from the list of plugins.



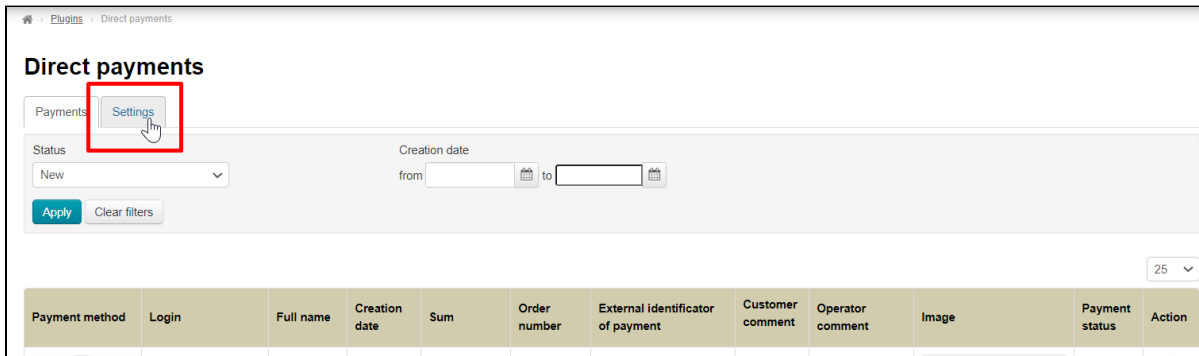
Activate plugin using "Activate" button in Actions menu if it is not activated.



Click "Direct Payments" title.

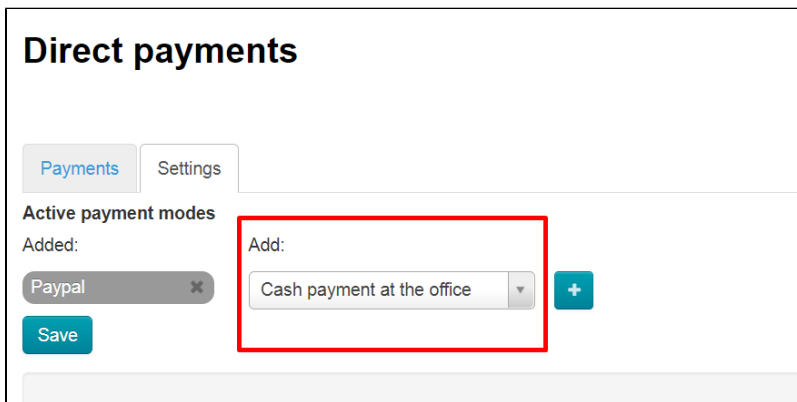


Open "Settings" tab.

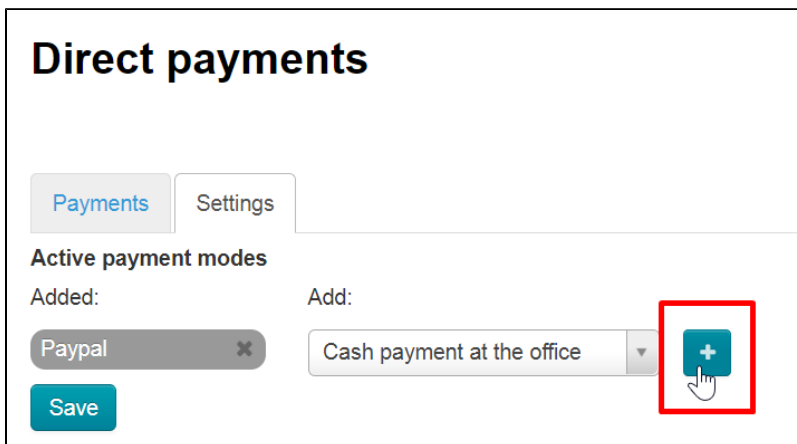


Add payment methods

Choose payment methods first. Full list of available methods is on the right:



Select payment method from the list by mouse click and click "Add" button (a button with a plus sign).



Added methods will be shown on the left. You can choose any number of available payment methods.

Direct payments

Payments

Settings

Active payment modes

Added:

Paypal



Cash payment a...



Kaspi card



Add:



Save



Important!

Contact OT technical support or your manager in Skype chat if there is no necessary method of accepting payments in the list of available methods (this list is available after connecting "Direct Payments" plugin during payments set up).

Click "Save" button.

Direct payments

Payments

Settings

Active payment modes

Added:

Paypal



Cash payment a...



Kaspi card



Add:



Save

List for direct payment settings by mode

Payment method will be available for use after saving.

Set messages for customers

You must write payment messages in special fields for each payment method.

List for direct payment settings by mode

direct.paypal
direct.kaspi
direct.cash

Start message of direct payment

File Edit View Insert Format Tools Table

Formats A A

Please send your order payment to Paypal by email at test@test.com

11 WORDS POWERED BY TINY

Write the message which will be shown at the beginning, before making payment.

You can specify card number here or request to write some information in comments for payment. You can also post detailed payment instructions. You can edit and format message using special text editor that works like MS Word.

List for direct payment settings by mode

direct.paypal
direct.kaspi
direct.cash

Start message of direct payment

File Edit View Insert Format Tools Table

Formats A A

Please send your order payment to Paypal by email at test@test.com

11 WORDS POWERED BY TINY

Finish message of direct payment

Save text clicking "Save" button with the tick.

List for direct payment settings by mode

direct.paypal

direct.kaspi

direct.cash

Start message of direct payment

File Edit View Insert Format Tools Table

Undo Redo Bold Italic Underline

Text Color Background Color Link Unlink Image Table

Formats A A

Please send your order payment to Paypal by email at test@test.com

DIV » SPAN 11 WORDS POWERED BY TINY



This text will be shown to your customer immediately after clicking "Pay" button.

Please send your order payment to Paypal by email at test@test.com

User full name

Ivanov Ivan Ivanovich

Purpose

Order payment Order-0000000301

Amount

\$250

Comment

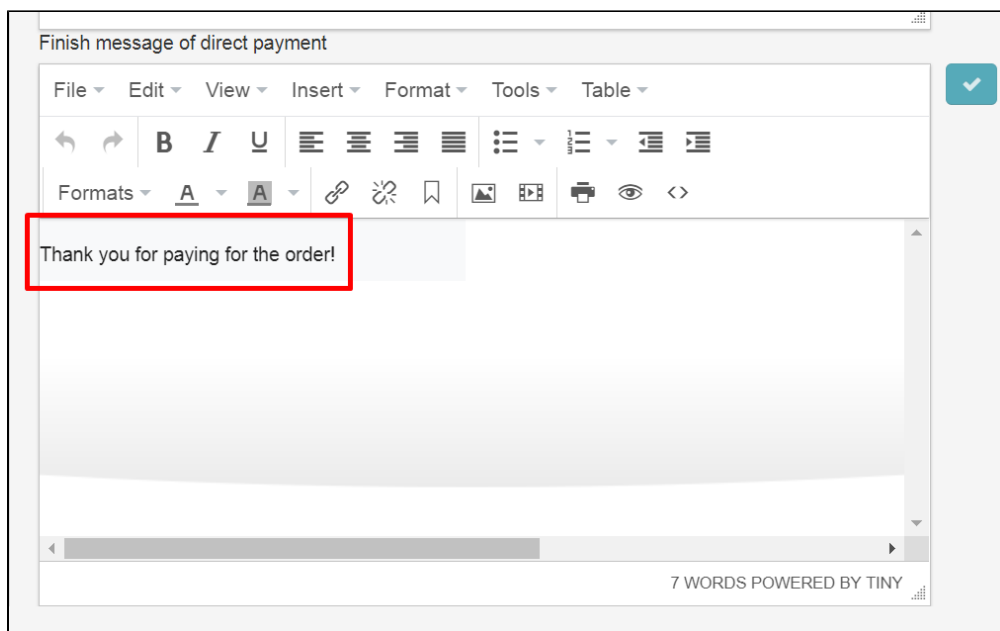
Upload file

Выберите файл

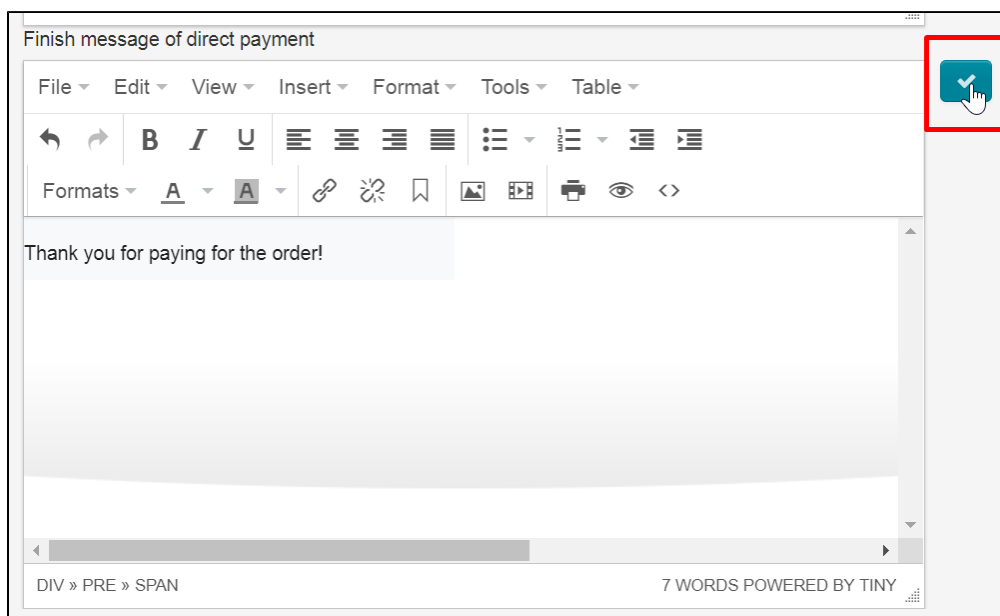
Файл не выбран

SUBMIT

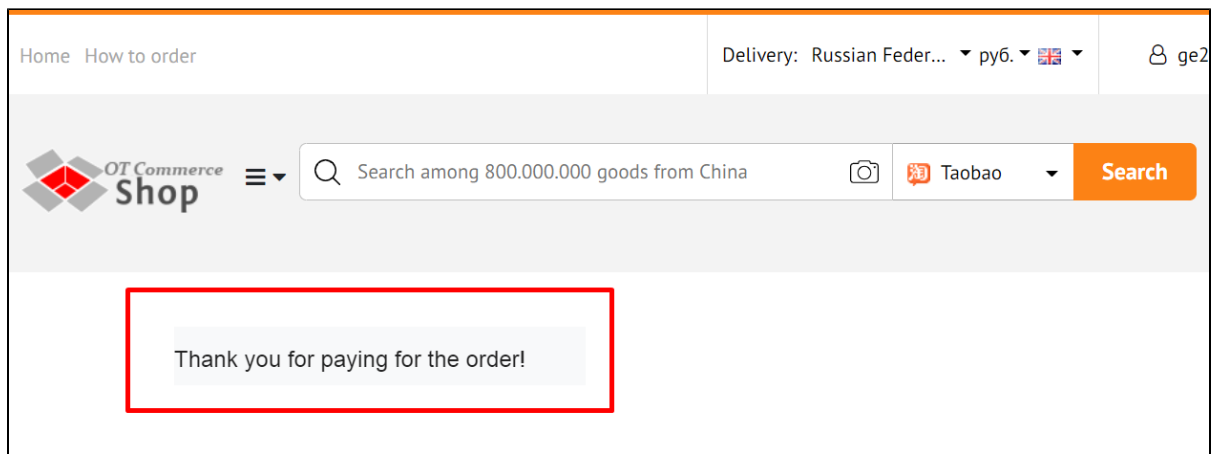
Compose a message that will be shown after making payment (it is necessary to write a separate message for each payment method) after that. You can write thanks for payment or something else here.



Save text clicking "Save" button with the tick.

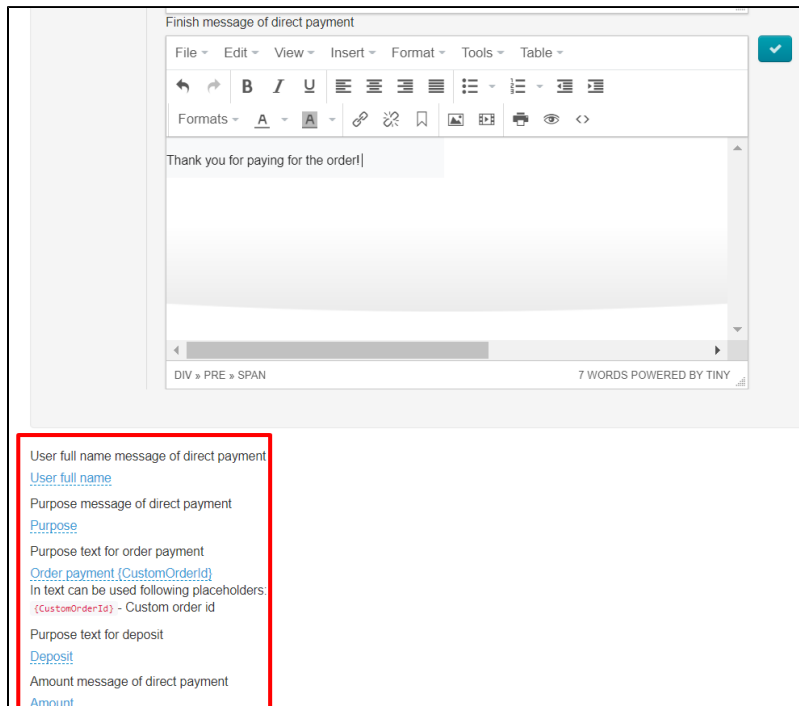


This text will be shown to your customer immediately after clicking "Confirm" button.



Edit fields of the form and error messages

There is a list of fields for editing right below the message form of direct payment.



Labels on the left (linked by red arrows to fields on the right):

- User full name message of direct payment
- User full name
- Purpose message of direct payment
- Purpose
- Purpose text for order payment
- Order payment {CustomOrderId}
- In text can be used following placeholders:
- {CustomOrderId} - Custom order id
- Purpose text for deposit
- Deposit
- Amount message of direct payment
- Amount
- Comment message of direct payment
- Comment
- Comment error message of direct payment
- Comment is required and can't be empty
- Upload file field state of direct payment
- Required
- Upload file message of direct payment
- Upload file
- Upload file error message of direct payment
- File is required and can't be empty
- Submit message of direct payment
- Submit
- State of external transaction id of direct payment
- Not required

Form fields on the right:

- User full name: Ivanov Ivan Ivanovich
- Purpose: Order payment Order-0000000301
- Amount: \$250
- Comment: (empty text area)
- Upload file: Выберите файл | Файл не выбран
- SUBMIT button

Placeholder text box (linked by green arrow to Purpose field):

Please send your order payment to Paypal by email at test@test.com

Fields titles

Click blue dotted line and edit to add necessary title.

User full name message of direct payment

User full name

Purpose message of direct payment

Purpose

Purpose text for order payment

Order payment {CustomOrderId}

In text can be used following placeholders:

{CustomOrderId} - Custom order id

Click checkmark button opposite each changed field to save changes.

Each field is edited and saved separately.

User full name message of direct payment

User full name

Purpose message of direct payment

Purpose

Purpose text for order payment

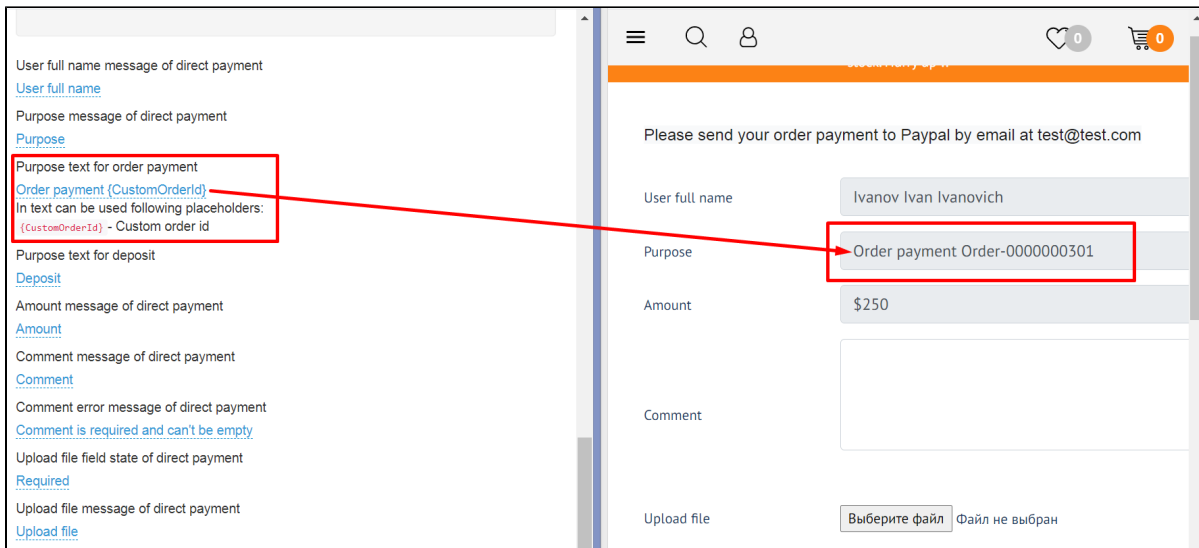
Order payment {CustomOrderId}

In text can be used following placeholders:

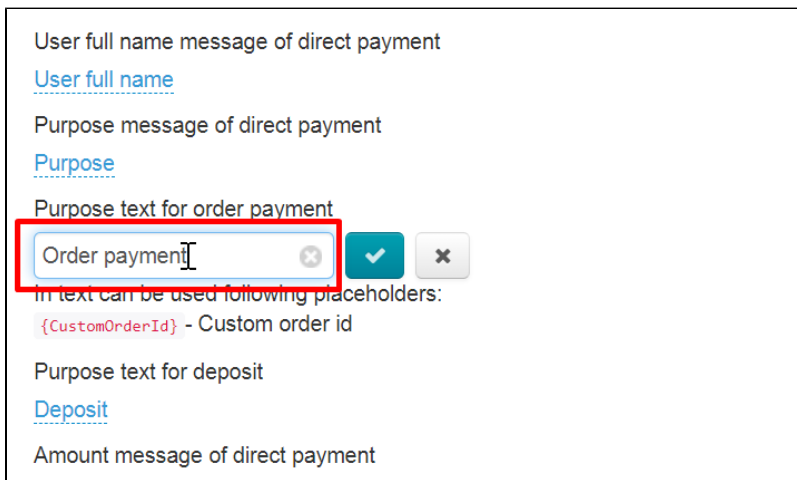
{CustomOrderId} - Custom order id

Set number of paid order

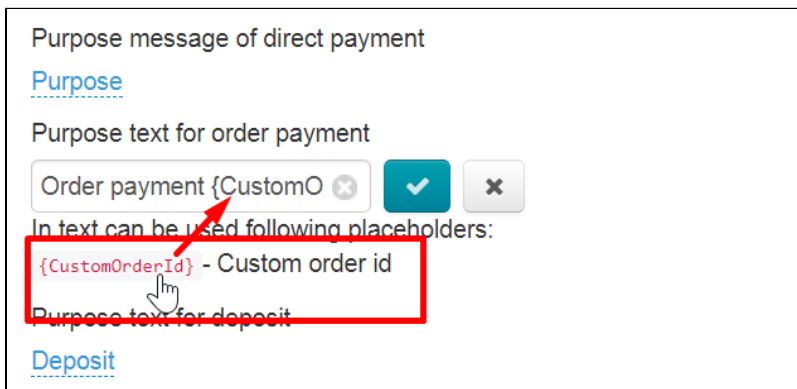
You can write the order number in "Purpose" field not to confuse yourself and your customers which order was paid.



You can edit this field clicking blue dotted line.



To insert a special value (it will show order number), you need to put cursor at the end of the line or any necessary place in the phrase and click red line 1 time [{CustomOrderId}](#). Phrase will be inserted into editable field after clicking.



Save changes clicking checkmarked button.

Purpose message of direct payment

[Purpose](#)

Purpose text for order payment

payment {CustomOrderId}  

In text can be used following placeholders:

{CustomOrderId} - Custom order id

Purpose text for deposit

[Deposit](#)

Error messages

The list of settings contains fields where you need to write an error message. We recommend you describe the error briefly and in detail to make the customer understand immediately what he did wrong.

Purpose text for deposit

[Deposit](#)

Amount message of direct payment

[Amount](#)

Comment message of direct payment

[Comment](#)

Comment error message of direct payment

[Comment is required and can't be empty](#)

Upload file field state of direct payment

[Required](#)

Upload file message of direct payment

[Upload file](#)

Upload file error message of direct payment

[File is required and can't be empty](#)

Submit message of direct payment

[Submit](#)

Error messages are edited in the same way as all other fields: click blue dotted line to change text and save changes using checkmark button.

Comment error message of direct payment

Comment is required and   

Upload file field state of direct payment

[Required](#)

Upload file message of direct payment

[Upload file](#)

An example how the message looks like:

Please send your order payment to Paypal by email at test@test.com

User full name

Purpose

Amount

Comment

Comment is required and can't be empty

Upload file

File is required and can't be empty

Opportunity to upload image

We recommend to enable this field and make it mandatory if you need to receive payment receipts image/photo. Or you can remove the field or make it optional if payment receipt image/photo is not required.

Required action is a necessary parameter for making payment.

There are 3 fields responsible for uploading the image:

Comment error message of direct payment
[Comment is required and can't be empty](#)

Upload file field state of direct payment
[Required](#)

Upload file message of direct payment
[Upload file](#)

Upload file error message of direct payment
[File is required and can't be empty](#)

Submit message of direct payment
[Submit](#)

State of external transaction id of direct payment
[Not required](#)

Upload file field state is necessary to show or hide the field, as well as make it mandatory. Click blue dotted line and select appropriate value from the list.

Comment error message of direct payment
[Comment is required and can't be empty](#)

Upload file field state of direct payment
Required ✓ ✕
Disabled
Enabled
Required

Upload file message of direct payment
[Upload file](#)

Upload file error message of direct payment
[File is required and can't be empty](#)

Submit message of direct payment
[Submit](#)

Save changes clicking checkmarked button.

Comment error message of direct payment
[Comment is required and can't be empty](#)

Upload file field state of direct payment
Required ✓ ✕

Upload file message of direct payment
[Upload file](#)

Upload file error message of direct payment
[File is required and can't be empty](#)

Field title and error message are edited in the same way as all other fields: click blue dotted line to change text and save changes using checkmark button.

Upload file field state of direct payment
[Required](#)

Upload file message of direct payment
[Upload file](#)

Upload file error message of direct payment

☒

Submit message of direct payment

[Submit](#)

State of external transaction id of direct payment
[Not required](#)

Setup is complete. Notification texts, as well as a list of available payment methods, can be edited at any time.

Payment processing

Your customer makes an order, draws it up and chooses PayPal, for example, at the payment stage.

PAYMENT

Order Order-0000000301

To pay: \$250

☐ Cash

☒ Payment in system

ELECTRONIC WALLETS

 PayPal

Then he pays the order and confirms it in his Personal Account.

Go to admin panel of OT Box and open "Plugins" section to see the list of customers' payments.

Orders

Pricing

Promotion

Contents

Catalog

Users

Configuration

Reports

Plugins

Orders list

Display

specified period of time

from to

Customer

Customer search (ID)

Last name

Phone

Email

Delivery

City

All

Provider

All

Apply

Orders

Dev- Order number

☐ Awaiting payment

☐ Awaiting additional payment

☒ Paid

☒ In handling

☒ Order with added goods

☒ In handling at warehouse

☒ Ready for packing

☒ Ready to ship

☒ Posted

☐ Completed

☐ Cancelled

[Select all](#) / [Clear all](#)

Click "Direct Payments" title of the plugin to go to payments list.

Orders

Pricing

Promotion

Contents

Catalog

Users

Configuration

Reports

Plugins

Plugins > All

My plugins

Download/update

Plugins

Plugin	Version	Status	Action
Direct payments	1.0.0	Enabled	
Pop-up support	1.0.1	Enabled	

A record of made payments will be here.

Payments

Settings

Status

All

Creation date

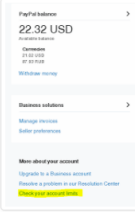
from

to

Apply

Clear filters

25

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
	ge222222a@mail.ru6	Ivanov Ivan Ivanovich	20.01.2021 16:46:20	\$250	ORD-0000000301		32005050			Waiting	

Log into PayPal personal account after that and find customer's payment or choose another way to make sure that money was deposited to your account.

Confirm payment clicking "Confirm" button (with a tick) in admin panel of OT Box when payment is found and the order is paid.

Email is sent to the customer after successful confirmation or cancellation of payment in admin panel.

Search for payment in general list

Use payment filter to find payment.

Payments

Settings

Status

New

Creation date

from

to

Apply

Clear filters

25

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
----------------	-------	-----------	---------------	-----	--------------	--------------------------------	------------------	------------------	-------	----------------	--------

Payment can be found both by creation date and by status. You must search for either New or Waiting to confirm payment. Select necessary payment status from drop-down list.

Direct payments

Payments

Settings

Status

All

▼

Apply

Clear filters

Payment method	Login	Full name
----------------	-------	-----------

Direct payments

Payments

Settings

Status

All

▼

All

New

Confirmed

Waiting

Canceled

Payment method	Login	Full name
----------------	-------	-----------

Click "Apply" when you select status and/or date of payment and you will see only those payments that you've selected yourself.

Direct payments

Payments
Settings

Status: New
Creation date: from to

Apply
Clear filters

25

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
----------------	-------	-----------	---------------	-----	--------------	--------------------------------	------------------	------------------	-------	----------------	--------

All payments are sorted by creation date by default.

Confirm payment

Click a tick ("Confirm" button) in "Action" column when payment is found.

Direct payments

Payments
Settings

Status: All
Creation date: from to

Apply
Clear filters

25

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
	ge222222a@mail.ru6	Ivanov Ivan Ivanovich	20.01.2021 16:46:20	\$250	ORD-0000000301		32005050			Waiting	✓

Admin comment and external identifier of payment are required to confirm payment.

Confirmation required

Confirm payment. Sum: \$250
Admin comment

External identifier of payment

Yes
Cancel

Click "Yes" to confirm payment. Order is automatically paid when you confirm payment.

Confirmation required

Confirm payment. Sum: \$250

Admin comment

Payment received on January 12, 2021

External identifier of payment

ER-095-000

Yes

Cancel

CreationOrderExternal identifierCustomerOperator

All confirmed payments can be viewed separately. Select "Confirmed" from drop-down list in filter "Status" and click "Apply" button.

Direct payments

PaymentsSettings

Status

Confirmed

Apply

Clear filters

Creation date

from to

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment
	ge222222a@mail.ru6	Ivanov Ivan Ivanovich	20.01.2021 16:46:20	3820.33 RUB	ORD-0000000301		32005050

View order and customer account

You will see the order that the buyer paid for if you click the order number.

25

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
	ge222222a@mail.ru6	Ivanov Ivan Ivanovich	20.01.2021 16:46:20	\$250	ORD-0000000301		32005050			Waiting	

Order will change status to "Paid".

№ Order-0000000301

⚙ Actions with order

Order

Status Paid

Creation date 20.01.21 15:47:29

Prices of goods in order \$200

Paid / Remaining \$250 / \$0.00

Weight 1.29 kg +

Delivery cost \$50
 [DHL](#)

Operator

Items (1)

Paid 1

Customer personal card will open in your admin panel if you click his login.

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
	ge222222a@mail.ru6	Ivanov Ivan Ivanovich	20.01.2021 16:46:20	\$250	ORD-0000000301		32005050			Waiting	✓ ✕

You can view payments operations on "Account" tab.

Orders

Pricing

Promotion

Contents

Catalog

Users

Configuration

Reports

Plugins

Users > Customers > Ge222222a@mail.ru6

Customers Administrators Roles Settings

Ge222222a@mail.ru6

About customer **Account** Orders

Customer info

Ivanov Ivan Ivanovich Sign in

Login ge222222a@mail.ru6 [Restore password](#)

Email ivanov@mail.ru6

Phone +78800000000

Skype

Member since 17.12.2020

Edit

Address

Ivan Ivanov
Россия
Moscow, Moscow, 125000
Samokathaya 13

[To customers list](#)

Order is automatically paid when you confirm payment.

Ge222222a@mail.ru6

[About customer](#)
[Account](#)
[Orders](#)

Account

Ivanov Ivan Ivanovich

Account id: 1714616

Funds: \$0.00

[Deposit](#)
[Withdraw](#)

Operations

[Show operator actions](#)

Date	Sum	Note
20.01.2021 (18:33:21)	\$250	Deposit money (direct.paypal)
20.01.2021 (18:33:21)	-\$250	Order payment (Order-0000000301)

[To customers list](#)

Cancel payment

Entry can be canceled using cancel button in "Actions" column if payment is not found in PayPal personal account (customer did not make payment).

Direct payments

[Payments](#)
[Settings](#)

Status: Creation date: from to

[Apply](#)
[Clear filters](#)

25

Payment method	Login	Full name	Creation date	Sum	Order number	External identifier of payment	Customer comment	Operator comment	Image	Payment status	Action
	ge222222a@mail.ru6	Ivanov Ivan Ivanovich	20.01.2021 16:46:20	\$250	ORD-0000000301		32005050			Waiting	☒ Cancel

It is recommended to leave a comment and click "Yes" to cancel payment.

Confirmation required

Confirm payment. Sum: \$250

Admin comment

Payment not received within 7 days

External identifier of payment

[Yes](#)
[Cancel](#)

You can view all cancelled payments using search filters. Select "Canceled" and click "Apply".

Direct payments

Payments

Settings

Status

Canceled

Creation date

from



to



Apply

Clear filters

Payment method

Login

Full name

Creation date

Sum

Order number

External identifier of payment

Direct payments

Payments

Settings

Status

Canceled

Creation date

from



to



Apply

Clear filters

100

Payment method

Login

Full name

Creation date

Sum

Order number

External identifier of payment

Customer comment

Operator comment

Image

Payment status

Action



ge222222a@mail.ru6

Ivanov Ivan Ivanovich

20.01.2021
16:15:27

\$250

ORD-
0000000301

Payment not received within 7 days

Canceled

✓ x