

SiteLok™

Paypal Plugin



V1.7

Sitelok Paypal Plugin Manual

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It is the users responsibility to ensure the suitability of Sitelok Paypal Plugin before using it. In no circumstances will Vibralogix be responsible for any loss or damage of data or programs as a result of using Sitelok. Your use of Sitelok implies acceptance of these terms.

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Chapter 1 Introduction

What is the Sitelok Paypal Plugin?

The Sitelok Paypal Plugin allows you to sell membership access to your Sitelok protected areas. Both one off (buy now) and recurring payments (subscriptions) are supported. You can setup Sitelok to handle existing buttons or you can have Sitelok generate the button code for you. For some applications you may find our Linklok Paypal product, which also integrates with Sitelok, an alternative solution.

New accounts created will use the members Paypal email address as the username together with a random password. The user can change these from their profile page if you allow this. Existing members updating an account can use their existing username and password.

An overview of how the Sitelok Paypal Plugin works

Buy Now buttons

Paypal's buy now buttons are used to take a one off payment from a client for membership. This allows you to sell membership for a fixed period or an unlimited time. When payment is made Sitelok will send a specified email to the buyer that can contain the Sitelok login details. The login details can also be displayed on the thank you page. Existing members will keep their original login details. If Paypal reverses the payment for some reason (usually fraud) then the membership will be automatically blocked.

Subscription buttons

Paypal's subscription buttons are used to take a recurring payment from a client for membership. This allows you to sell membership with a monthly, yearly, weekly or even daily subscription. When payment is made Sitelok will send a specified email to the buyer that can contain the Sitelok login details. The login details can also be displayed on the thank you page. Existing members will keep their original login details. If the subscription is cancelled or comes to the end of term then Sitelok will disable the membership and send the appropriate email. Note that when a user cancels a subscription they will have access until the end of the paid period as determined by Paypal (i.e. they won't necessarily get blocked immediately).

Paypal allows two optional trial periods in addition to the regular payment period. SiteLok supports this too. We recommend that you read Paypal's documentation to find out more.

Chapter 2 Installation

Installing the Sitelok Paypal Plugin

Before installing the Sitelok Paypal Plugin make sure that you have installed Sitelok and that it is working correctly. Ideally you should use the latest version but at the very least V3.0 should be installed.

Installing for the first time or upgrading

- 1) Extract the contents of the zip file to your PC.
- 2) Upload the [pay_paypal](#) folder to your existing Sitelok slpw folder using FTP. There are no special permissions required on most servers. If you have a previous version then overwrite the files.
- 3) Login to the Sitelok control panel.
- 4) Open the following URL in the browser

http://www.yoursite.com/slpw/pay_paypal/install.php

which will start the installation process. If all is well you will be taken to the plugin preferences page where you will see the plugin listed.

If you have any problems with installation please let us know so that we can help you.

Initial configuration

If you just upgraded you can ignore this section which is only required the first time you install the Paypal Plugin.

Before using the Sitelok Paypal Plugin for the first time we need to setup your Paypal account and also set some details about the account.

Setup you Paypal account

Sitelok makes use of Paypal's IPN feature to automatically control account creation, updating and blocking and the sending of account details by email. Optionally we can use Auto Return and PDT to display the Sitelok login details on a thank you page after payment as well.

- 1) Login to your Paypal account.

- 2) Click the **Profile** link in the menu and then click the **My selling preferences** link in the left hand column under My Profile. Scroll down to the **Getting paid and managing risk** section (you may have to expand it) and click **Update** next to **Instant payment notifications**. Enable IPN and set the **Notification URL** to (using your domain name of course)

http://www.yoursite.com/slpw/pay_paypal/slpaypal.php

If you have already enabled IPN for another application (such as Linklok Paypal) you can leave that original setting as is. As long as IPN is enabled it is ok as we will pass the required IPN handler URL in the Paypal button.

- 3) If you wish to display the Sitelok login details on a thank you page after payment (as well as the email that will be sent anyway) you need to also follow steps 4 to 6 below.
- 4) Click the **Profile** link in the menu and then click the **My selling preferences** link in the left column under My Profile. Scroll down to the **Selling online section** (you may have to expand it) and click **Update** next to **Website preferences**.

Enable **Auto Return** and set the URL to be (setting your site)

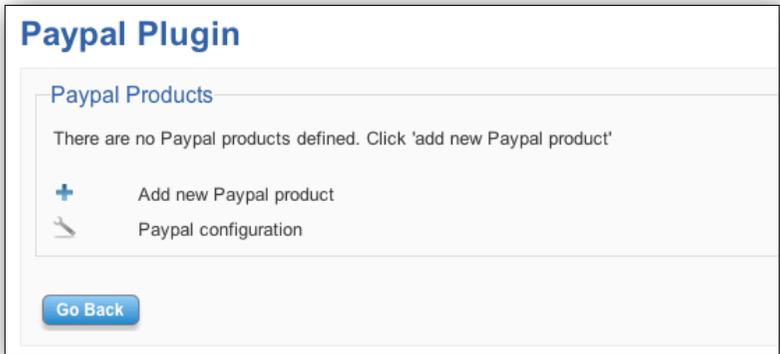
<http://www.yoursite.com>

If you have already enabled Auto Return for another application (such as Linklok Paypal) you can leave that original setting as is. As long as Auto Return is enabled it is ok as we will pass the required return page URL in the Paypal button.

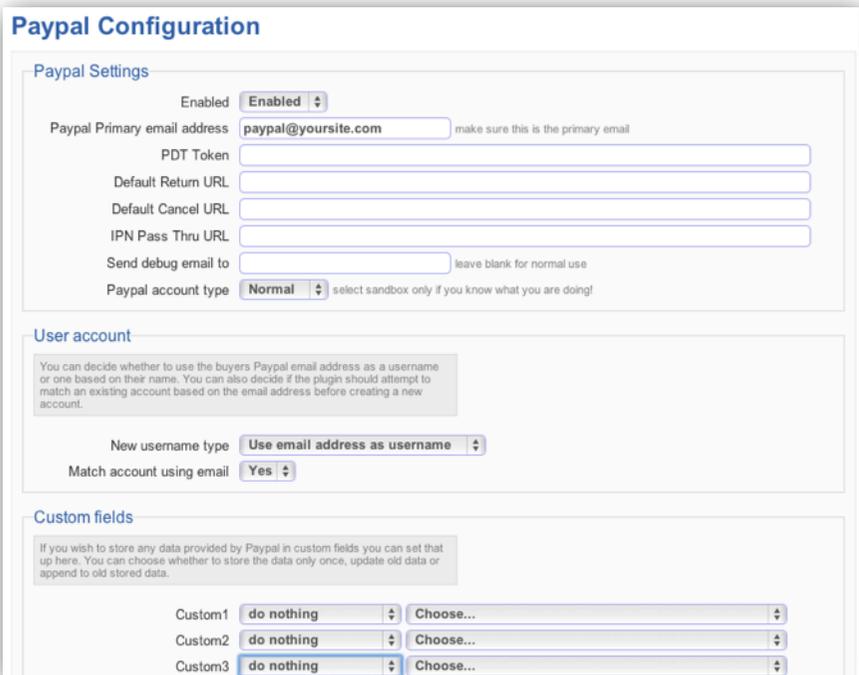
- 5) Scroll down the same page to find the **Payment Data Transfer** settings. Set this to **On** and scroll down to click the **Save** button.
- 6) Paypal should now display the PDT token value that is unique to your account. Copy this token to the clipboard or save it somewhere for later use.

Configuring the Sitelok Paypal Plugin

Login to the Sitelok control panel and click the **Paypal** option in the Plugins menu at the top of the screen. You will see the following.



Click [Paypal Configuration](#) to display the main settings for the Sitelok Paypal Plugin which will look something like this.



Enter the following settings and then click save to store the configuration. The other settings will be described later in the manual.

Paypal Primary Email address

Enter you Paypal account primary Paypal email address. This must be the main email address used on your account. You can use any other registered email address in your buy buttons but this setting must be the primary address.

PDT token

If you enabled auto return and PDT so you can display Sitelok details on a thank you page then enter the PDT token exactly as provided by Paypal.

Default Return URL

You can enter a default URL (including the http:// part) that you wish to return the user to after payment. You can leave this blank and set it for individual products if you prefer. Later we will show you how you can add the Sitelok Login details to the return page if you wish.

Default Cancel URL

You can enter a default URL (including the http:// part) that you wish to return the user to if they click the cancel button during Paypal checkout and don't complete the payment. You can leave this blank and set it for individual products if you prefer.

IPN Pass thru

You can leave this setting blank. Its only needed if you require a second IPN handler to be called at the same times as this plugin.

Debug Email

You can leave this setting blank. If you are having problems you can enter your email address to receive error reports.

New username type

This sets the username type the plugin will use when creating a new Sitelok account. This can be either the buyers Paypal email address or a unique username based on the buyers name (plus number to make it unique).

We store the Paypal account id (`payer_id`) with the Sitelok account so that any further transactions from the same Paypal account will be applied to the same Sitelok account. An exception to this would be when a username is forced in the Paypal button (see later).

Match account using email

If enabled the plugin will check first if a Sitelok account exists with the buyers Paypal email set in the username or email field before creating a new account. This is useful if an account exists that was created direct through registration or manually and is not linked to the Paypal account. If you enable this option it is probably wise to also enable the following two options in Sitelok which are available from V3.1.

[Email change verification](#)
[Email field must be unique](#)

Chapter 3 Creating Products

Once you have configured the Sitelok Paypal Plugin to work with your Paypal account it is actively listening for Paypal transactions. When products are purchased that have an item_number matching that set in the product definition in Sitelok it is actioned.

Setting up Buy Now (one off payment) products

Enter the Sitelok control panel and click the [Paypal](#) menu option. Click the [Add Product](#) icon to display the following.

Paypal Product

Product Details

Product ID to match the button item_number

Enabled

Product Name

Product Type

Product Pricing

If you select multi currency you can set prices in up to 4 currencies. Leave blank those you don't need. For subscription products you can set a regular price and also one or two trial period prices. Leave the trial prices blank if you don't need them.

Multiple Currencies

Regular Price

Return page and Emails

Client joining email

Admin joining email

Client cancel email

Admin cancel email

Return URL

Cancel URL

Usergroups

Choose the usergroup(s) you wish the user to join upon payment for this product and enter the number of days membership. For subscriptions we suggest entering 0 days as membership will be expired automatically when required. If you want to remove a user from a usergroup when this product is purchased you can set -1 days.

Group name Days

Product ID

Enter a short product id that is unique for this product. If you have already created a buy now button make sure this matches the item_number you used (Item ID for hosted buttons).

Product enabled

Make sure to select enabled.

Product name

Enter a description of the product for future reference.

Product Type

You can select the type of product, either Buy Now (one payment) or Subscription (recurring payments). Leave set to Buy Now.

Multiple Currencies

In most cases you will probably charge for membership in one currency so you can leave this set to No. However if you wish to create different buttons for different currencies then set Yes.

Price

Enter the price you will charge for this membership product and select the currency code. If you have already created your buy button make sure that this amount and currency code matches those set in the button.

If you enabled multiple currencies then you can enter up to 4 different prices and currency codes.

Emails

Here can can select the email templates to be sent to the buyer and the Sitelok admin upon joining or canceling (reversed payment). The email template to send must exist already in the slpw/email folder. You can use Sitelok's built html editor to create templates.

Return URL

You can enter a full URL (including the http:// part) that you wish to return the user to after payment. Later we will show you how you can add the Sitelok Login details to the return page if you wish. If you leave this blank then any default URL you set in the configuration settings will be used. If that is also blank then the URL set in your Paypal will be used.

Cancel URL

You can enter a full URL (including the http:// part) that you wish to return the user to if they click the cancel button during Paypal checkout and don't complete the payment. If you leave this blank then any default URL you set in the configuration settings will be used.

Usergroups

Here you can enter up to five usergroups that the user will join upon purchase. You must also enter the number of days that membership is valid for (set to 0 for unlimited).

Note that if a user is already a member of a group when they purchase membership that Sitelok will extend their membership by the number of days set here. This enables a user to re-subscribe to you site without waiting to expire.

There maybe times when you wish to remove a user from a certain usergroup when another is purchased. To do this just list the usergroup to remove the user from with the expiry set to -1.

Click Save to store the product details.

Setting up Subscription (recurring payments) products

Enter the Sitelok control panel and click the [Paypal](#) menu option. Click the [Add Product](#) icon and select [Subscription](#) from [Product Type](#) to display the following.

Paypal Product

Product Details

Product ID to match the button item_number

Enabled

Product Name

Product Type

Product Pricing

If you select multi currency you can set prices in up to 4 currencies. Leave blank those you don't need. For subscription products you can set a regular price and also one or two trial period prices. Leave the trial prices blank if you don't need them.

Multiple Currencies

Regular Price

Regular period

Number of regular payments leave blank for continuous payments until cancelled

Trial 1 Price

Trial 1 period

Trial 2 Price

Trial 2 period

Return page and Emails

Client joining email

Admin joining email

Client cancel email

Admin cancel email

Client end of term email

Admin end of term email

Return URL

Cancel URL

Product ID

Enter a short product id that is unique for this product. If you have already created a buy now button make sure this matches item_number you used (Item ID for hosted buttons).

Product enabled

Make sure to select Enabled.

Product name

Enter a description of the product for future reference.

Product Type

You can select the type of product, either Buy Now (one payment) or Subscription (recurring payments). Set to Subscription.

Multiple Currencies

In most cases you will probably charge for membership in one currency so you can leave this checkbox unchecked. However if you wish to create different buttons for different currencies check this box.

Regular price

Enter the recurring amount you will charge for this membership product and select the currency code. If you have already created your buy button make sure that this amount and currency code matches those set in the button (the amount set in the a3 field).

If you enabled multiple currencies then you can enter up to 4 different amounts and currency codes.

Regular period

Enter the period that payments should be made. For example you could set 1 month to collect one payment monthly.

Number of regular payments

For most subscriptions you will wish the payment to continue until the client decides to cancel the subscription from their Paypal account. In this case leave this setting blank. However if you want to have a fixed number of payments then set the number here.

Trial 1 price

This is optional and for most subscriptions you can leave it blank. If you wish to offer a separate trial period before the regular period begins set the price here. If you have already created your buy button make sure that this amount matches those set in the button (the amount set in the a1 field).

If you enabled multiple currencies then you can enter up to 4 different amounts in the currencies you selected for the regular prices.

For further details about the trial period please check Paypal's documentation.

Trial 1 period

This is optional and for most subscriptions you can leave it blank. If you wish to offer a separate trial period before the regular period begins enter the length of the first trial period.

Trial 2 price

This is optional and for most subscriptions you can leave it blank. If you wish to offer a second separate trial period before the regular period begins set the price here. If you have already created your buy button make sure that this amount matches those set in the button (the amount set in the a2 field).

If you enabled multiple currencies then you can enter up to 4 different amounts in the currencies you selected for the regular prices.

Trial 2 period

This is optional and for most subscriptions you can leave it blank. If you wish to offer a second separate trial period before the regular period begins enter the length of the second trial period.

Emails

Here can can select the email templates to be sent to the buyer and the Sitelok admin upon joining, canceling (the client cancels the subscription) or End of Term (when the subscription reaches an end). The email template to send must exist already in the slpw/email folder. You can use Sitelok's built html editor to create templates.

Return URL

You can enter a full URL (including the http:// part) that you wish to return the user to after payment. Later we will show you how you can add the Sitelok Login details to the return page if you wish. If you leave this blank then any default URL you set in the configuration settings will be used. If that is also blank then the URL set in your Paypal will be used.

Cancel URL

You can enter a full URL (including the http:// part) that you wish to return the user to if they click the cancel button during Paypal checkout and don't complete the payment. If you leave this blank then any default URL you set in the configuration settings will be used.

Usergroups

Here you can enter up to five usergroups that the user will join upon purchase. For subscription payments you will normally enter 0 for the expiry time. This allows unlimited access until the subscription is cancelled. You can however enter a fixed number of days if you wish.

There maybe times when you wish to remove a user from a certain usergroup when another is purchased. To do this just list the usergroup to remove the user from with the expiry set to -1.

Click Save to store the product details.

Creating the Paypal buttons

When you added some products to the Paypal Plugin you can easily create the html code required for the button by clicking the  icon next to the product.

which which will display the html form for the button. For example:-

Chapter 3 - Creating Products

Buy Now button for One year membership (id1) with currency USD

```
<form target="paypal" action="https://www.paypal.com/cgi-bin/webscr" method="post">
<input type="hidden" name="add" value="1">
<input type="hidden" name="cmd" value="_xclick">
<input type="hidden" name="business" value="paypal@yoursite.com">
<input type="hidden" name="item_name" value="One year membership">
<input type="hidden" name="item_number" value="id1">
<input type="hidden" name="amount" value="9.95">
<input type="hidden" name="no_note" value="1">
<input type="hidden" name="no_shipping" value="1">
<input type="hidden" name="currency_code" value="USD">
<input type="hidden" name="notify_url" value="http://localhost/sitelokpwclean/slpw/pay_paypal/slpaypal.php">
<input type="submit" value="Join Now">
</form>
```

Select Code

You can click the [Select Code](#) button and the copy the html to the clipboard (ctrl V) and then paste it into your page.

Chapter 4 The return page

If you have enabled Auto Return and PDT in your Paypal account then after paying the buyer will be returned to a page on your site. This page URL is defined in the product definition described earlier. The page can be just a thank you page explaining that their membership login details will be emailed to them or you can if you wish display the login details on this page too.

Important Note. Due to a bug in Paypal's PDT system you cannot display login details in the return page if your subscription includes a trial period. In this case you should return the user to a page explaining that their login details will arrive by email. Hopefully Paypal will solve this at some point.

For an example return page see `returnpage.php` in the zip file. You should copy this page to the root of your site.

To use your own page ensure that it has the extension `.php` and add the following line to the very top of the page.

```
<?php require("slpw/pay_paypal/slpaypal.php"); ?>
```

This assumes the page is in the root of your site but you can adjust this path if not.

You can display data on the page using the same variables that you use to display user data on membership pages. For example.

```
<?php echo $slusername; ?>   Sitelok username  
<?php echo $slpassword; ?>  Sitelok password  
<?php echo $slfirstname; ?> Users first name
```

You can also display Paypal variables sent to the page. For example to display the transaction id you can use `<?php echo $slorder['txn_id']; ?>`

Because there maybe times when an error occurs during payment we recommend that your return page can handle this. We have setup a variable called `$slordercompleted` that can be tested to check that there were no errors. If an error did occur then the variable `$slmessage` will contain the details. These variables are used as in this example page (see `returnpage.php` in the zip).

Chapter 4 - The return page

```
<?php require("slpw/pay_paypal/slpaypal.php"); ?>
<html>
<head>
<title>Thank you for joining</title>
</head>
<body>
<?php if ($slordercompleted) { ?>
Thank you <?php echo $slfirstname; ?> for joining. Here are your login details<br>
<br>
Username: <?php echo $slusername; ?><br>
Password: <?php echo $slpassword; ?><br>
<br>
If you have any questions please contact us.<br>
<?php } ?>
<?php if (!$slordercompleted) { ?>
Sorry but it appears that an error occurred while processing your order.<br>
<br>
<?php echo $slmessage; ?><br>
<br>
Please contact us to resolve this issue.<br>
<?php } ?>
</body>
</html>
```

Chapter 5 Advanced features

Keeping an existing username

When a new account is created in Sitelok by the Paypal plugin we also store the Paypal account id (payer_id) so that future transactions from the same account will update the same Sitelok account. Normally this is all that is needed. However there maybe times when you need to force a Paypal payment to be applied to the currently logged in users account. To do this make sure your Paypal button is on a members page (so that the user is logged in) and add this line to your button (your page with have be .php for this).

```
<input type="hidden" name="custom" value="<?php echo $slordercustom; ?>">
```

Note that transactions that relate to a parent transaction, such as canceling a subscription, will automatically get applied to the same Sitelok account that was created for that subscription irrespective of whether the Paypal account has since been linked to a different Sitelok account or a username has been passed in via the button.

A user can change their username, email or any other account details without affecting anything connected to Paypal.

Using the Paypal Sandbox

If you want to test things using the Paypal Sandbox then set [Sandbox](#) in the Paypal account type setting on the Paypal configuration page. Ensure that the appropriate Paypal email address and PDT token are set as well as these are unique to the sandbox account.

Debugging

Sometimes testing a Paypal installation can be tricky. We recommend that you set up the return page so that you can see any error messages after payment. You can also set a debugging email address so that you can receive data about any errors occurring during the IPN process. This is set in [Send debug email to](#) on the Paypal configuration page.

IPN Passthru

If you need to pass the IPN call from Paypal on to another script you can set the URL in [IPN Pass Thru URL](#) on the Paypal configuration page.

Setting custom field values

When an order is received you can have Sitelok store values from Paypal in custom fields. For example you could choose to store the buyers address details. You can define the data to store and how to update it when further orders are made in the Custom Fields section on the Paypal configuration page.

Chapter 6 Support

Hopefully if you have followed this manual carefully everything will be working fine. However sometimes things don't go quite so smoothly so if you have any questions or problems then please check the FAQ on the support page or email us.

Support area: <http://www.vibralogix.com/support/>

Email: support@vibralogix.com