

# Sitelok™

## 2CO Plugin



V1.5

## **Sitelok 2CO Plugin Manual**

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It is the users responsibility to ensure the suitability of Sitelok 2CO 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 2CO Plugin?

The Sitelok 2CO Plugin allows you to sell membership access to your Sitelok protected areas. Both one off and recurring payments (subscriptions) are supported. For some applications you may find our Linklok 2CO product, which also integrates with Sitelok, an alternative solution.

New accounts created will use the members email address or a unique username based on their name 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 2CO Plugin works

2CO supports both single payment and recurring payment products. You create these products in 2CO as usual and then let Sitelok know how to create the membership for each product when ordered. Sitelok will ignore any products you have setup in your 2CO account that are not used in Sitelok.

The plugin fully supports 2CO's fraud management system so we can block access while an order is awaiting a fraud review and enable access when it has passed.

### Single payment products

When a single payment product is purchased that matches a product in Sitelok the user account will be created using the buyers email address (or unique username based on their name) as the username and a random password (existing users will retain their username and password). The user will be added to the specified usergroup(s) for a fixed period of time or an unlimited time. The login details are emailed to the user.

### Recurring payment products

When a recurring product is purchased that matches a product in Sitelok the user account will be created using the buyers email address (or unique

username based on their name) as the username and a random password (existing users will retain their username and password). The user will be added to the specified usergroups(s). If your 2CO recurring product is for a fixed period (i.e. a monthly payment for 1 year) then the expiry date will be set for the appropriate period (1 year in this example). If the recurring payments are set to continue until cancelled then the plugin will expire access when the users payment stop.

### **Non membership buttons**

Sitelok also supports buttons that don't create a membership. These can be useful where you just want to take a payment for something else but still want Sitelok to send out an email or for use with plugins. For example you can use a button to sell credits for use with the Credits plugin.

## Chapter 2 Installation

### Installing the Sitelok 2CO Plugin

Before installing the Sitelok 2CO 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\\_2co](#) 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\\_2co/install.php](http://www.yoursite.com/slpw/pay_2co/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 2CO Plugin.

Before using the Sitelok 2CO Plugin for the first time we need to setup your 2CO account and also set some details about the account.

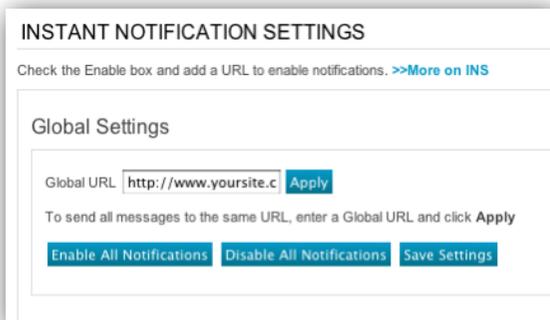
### Setup you 2CO account

Sitelok makes use of 2cO's INS feature to automatically control account creation, updating and blocking and the sending of account details by email.

- 1) Login to your 2CO account.
- 2) Click [Notifications](#) and then click [Settings](#). Enter this URL (using your domain of course) in the Global URL field.

[http://www.yoursite.com/slpw/pay\\_2co/sl2co.php](http://www.yoursite.com/slpw/pay_2co/sl2co.php)

Click the **Enable All Notifications** button and the **Save Settings**. This should add the same URL to each of the INS settings.



INSTANT NOTIFICATION SETTINGS

Check the Enable box and add a URL to enable notifications. >>More on INS

Global Settings

Global URL  [Apply](#)

To send all messages to the same URL, enter a Global URL and click Apply

[Enable All Notifications](#) [Disable All Notifications](#) [Save Settings](#)

If you already have INS setup to call another script keep a note of the URL and you can enter that in the INS Pass thru setting in the plugin later.

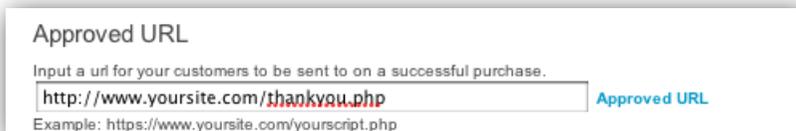
- 3) Click **Account** and then **Site Management** and Scroll down to the **Secret Word** setting. If you already have this set then make a note of the word. If not then enter a word up to 16 characters long. We will set this same word in the plugin later.



Secret Word

There is a 16 character limit on the [Secret Word](#)

- 4) After a user has paid for membership you can return them to a thank you page. To do this scroll down to the Approved URL and set the URL to the page. This page should explain to the user that their login details will be emailed to them once the order has been approved.



Approved URL

Input a url for your customers to be sent to on a successful purchase.

[Approved URL](#)

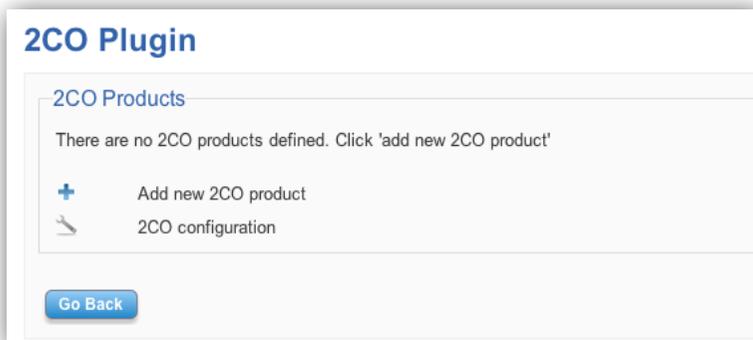
Example: <https://www.yoursite.com/yourscript.php>

## Configuring the Sitelok 2CO Plugin

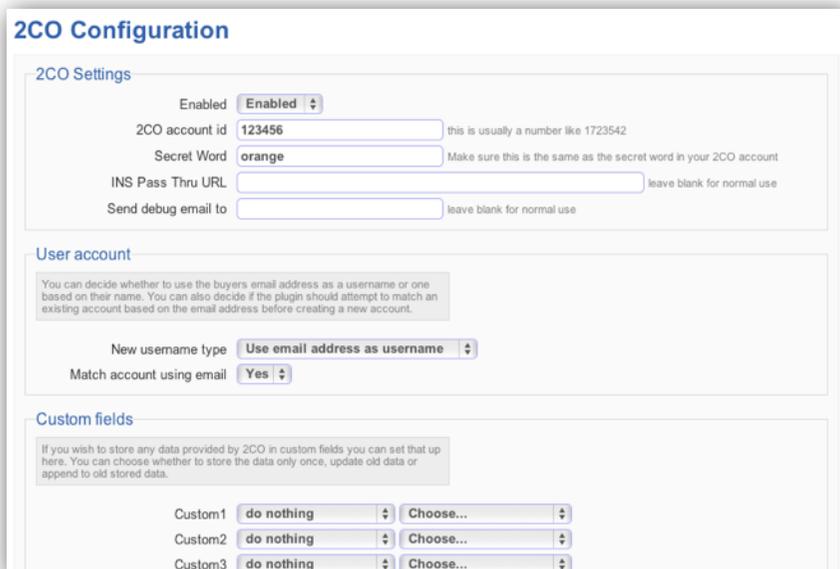
## Chapter 2 - Installation

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Login to the Sitelok control panel and click the **2CO** option in the Plugins menu at the top of the screen. You will see the following.



Click **2CO Configuration** to display the main settings for the Sitelok 2CO 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.

### **2CO account id**

Enter your numeric 2CO account id.

### **Secret Word**

Enter the secret word that you have set in your 2CO account.

### **New username type**

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

### **Match account using email**

If enabled the plugin will check first if a Sitelok account exists with the buyers email set in the username or email field before creating a new 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

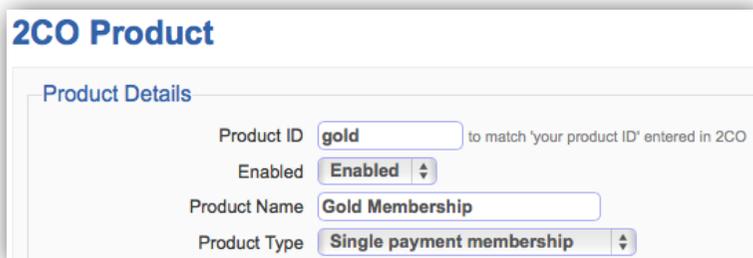
Once you have configured the Sitelok 2CO Plugin to work with your 2CO account it is actively listening for 2CO transactions. When products are purchased that have a 2CO product id matching that set in the product definition in Sitelok it is actioned.

First of all you should create your product and button in your 2CO account as usual. Keep a note of the numeric 2CO product id that they assign for the product as we will use that.

### Setting up a product in the plugin

Enter the Sitelok control panel and click the [2CO](#) menu option. Click the [Add Product](#) icon.

### General product settings



The screenshot shows a web form titled "2CO Product" with a sub-section "Product Details". The form contains the following fields:

- Product ID:** A text input field containing "gold" with a small note to its right: "to match 'your product ID' entered in 2CO".
- Enabled:** A dropdown menu currently set to "Enabled".
- Product Name:** A text input field containing "Gold Membership".
- Product Type:** A dropdown menu currently set to "Single payment membership".

#### Product ID

Enter the product id you entered for the product you created in the 2CO admin. This is the id set in the field named 'Your product ID'.

#### Product name

Enter a description for the product.

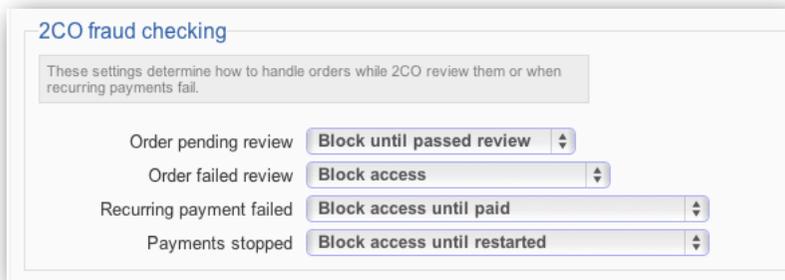
#### Product Type

Select the correct product type. Either [Single payment membership](#), [Recurring payment membership](#) or [Other single payment](#). Other single payment products have less settings as they are just used to sell non

membership products but where you would still like Sitelok to send out an email. They can also be used with the Credits plugin.

### Fraud check settings

2CO have a fraud review system in place which can help prevent fraudulent orders and chargebacks. If you use this in Sitelok then you can have account blocked until they have passed this review. Sitelok blocks accounts by setting the expiry dates for related usergroups to yesterday. It only does this on usergroups related to this order and won't affect other access. It unblocks users by putting back the original expiry dates for the related usergroups.



The screenshot shows a settings panel titled "2CO fraud checking". Below the title is a descriptive text box: "These settings determine how to handle orders while 2CO review them or when recurring payments fail." There are four rows of settings, each with a label and a dropdown menu:

Setting	Value
Order pending review	Block until passed review
Order failed review	Block access
Recurring payment failed	Block access until paid
Payments stopped	Block access until restarted

#### Order pending review

You can select what to do when 2CO receives an order and flags it for review. The default setting **Block until passed review** will keep access blocked for this order until 2CO have confirmed the order. Once it has passed the review the account will be unblocked and an email sent to the user. Setting **Allow access during review** will not block the user.

#### Order failed review

If an order fails a fraud review you can decide to either **Block access** (this is the default) or to **Allow access (handle manually)**.

#### Recurring payment failed

This option is only displayed for recurring payment products. In the case of a failed recurring payment you can decide whether to **Block access** until paid or **Continue to allow access**. If access is blocked Sitelok will unblock it once a payment is successfully made.

#### Recurring payments stopped

This option is only displayed for recurring payment products. If a user or 2CO stops payments for some reason you can decide whether to **Block access until restarted** or **Continue to allow access**. If access is blocked Sitelok will unblock it if recurring payments are restarted.

### Email Notifications

Each time an order is placed, a recurring payment received or a fraud status changes you can have Sitelok send out an email template to the user and to the Sitelok admin.

#### Emails notifications

These settings allow you to choose which email templates to send to the client and to the site admin for various events in the purchase process.

Client new order (passed)	Don't send email
Admin new order (passed)	Don't send email
Client new order (waiting)	Don't send email
Admin new order (waiting)	Don't send email
Client new order (fraud)	Don't send email
Admin new order (fraud)	Don't send email
Client fraud status wait	Don't send email
Admin fraud status wait	Don't send email
Client fraud status pass	Don't send email
Admin fraud status pass	Don't send email
Client fraud status fail	Don't send email
Admin fraud status fail	Don't send email
Client recurring payment ok	Don't send email
Admin recurring payment ok	Don't send email
Client recurring payment failed	Don't send email
Admin recurring payment failed	Don't send email
Client payments stopped	Don't send email
Admin payments stopped	Don't send email
Client payments restarted	Don't send email
Admin payments restarted	Don't send email
Client payments complete	Don't send email
Admin payments complete	Don't send email

You will see that each email setting allows you to select the email template to be sent to the user and to the admin when that event occurs. Some emails are only applicable to recurring payment products.

### **New order (passed)**

This email is sent out when a new order is received and it has already passed the fraud review. This email should provide the user with their login details

### **New order (waiting)**

This email is sent out when a new order is received and is waiting for a fraud review by 2CO (assuming you set **Block access pending review** above). Ideally you should explain to the user that they will have access once approved.

### **New order (fraud)**

This email is sent out when a new order is received and has been flagged as fraudulent by 2CO (assuming you set **Block access** above).

### **Fraud status wait**

This email is sent if the fraud status of an order changes and now requires a review by 2CO.

### **Fraud status pass**

This email is sent if the fraud status of an order changes and has now passed.

### **Fraud status fail**

This email is sent if the fraud status of an order changes and has now failed.

### **Recurring payment ok**

This email is sent out when a recurring payment is successfully received for an item.

### Recurring payment failed

This email is sent out when a recurring payment fails.

### Payments stopped

This email is sent out when a user or 2CO has stopped payments for a specific item.

### Payment restarted

This email is sent out when 2CO restart payments after they have been stopped.

### Payments complete

This email is sent out when recurring payments are completed. This would happen after 12 payments if your product was for a year of monthly payments.

## Usergroups

You need to define which usergroup(s) the user should join when they purchase this product and also for how long.

### One off payment products

For a one off payment product you should set the expiry time in days. For example if the payment is for a one year membership set the expiry to be 365 days, If you don't want the membership to expire set it to 0.

The screenshot shows a form titled "Usergroups" with a blue header. Below the title is a grey box containing the following text: "Choose the usergroup(s) you wish the user to join upon payment for this product and enter the number of days membership. For recurring products we recommend 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 as the expiry time." Below this text are five rows of input fields. Each row consists of a "Group name" label, a text input field, a small downward arrow icon, a "Days" label, and a text input field. The first row has "GOLD" in the group name field and "365" in the days field. The other four rows have empty input fields.

## Chapter 3 - Creating Products

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If you wish for a user to be removed from a usergroup when they purchase a product you can list that usergroup and set the expiry to -1.

### Recurring payment products

In the case of recurring payment products we strongly recommend setting the expiry time to 0. Sitelok will get the expiry data for the product from 2CO. For recurring products with a fixed number of payments we will set the expiry date to the end date. For continuous recurring payments we will leave the expiry unlimited initially and only set that once payments stop.

If you wish for a user to be removed from a usergroup when they purchase a product you can list that usergroup and set the expiry to -1.

You can also check the checkbox if you wish the user to keep access to a specific usergroup when payments stop.

### Usergroups

Choose the usergroup(s) you wish the user to join upon payment for this product and enter the number of days membership. For recurring products we recommend 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 as the expiry time.

We recommend setting the expiry time to 0 for recurring products

Group name	<input type="text" value="GOLD"/>	<input type="button" value="▼"/>	Days	<input type="text" value="0"/>	Don't block at end of term <input type="checkbox"/>
Group name	<input type="text"/>	<input type="button" value="▼"/>	Days	<input type="text"/>	Don't block at end of term <input type="checkbox"/>
Group name	<input type="text"/>	<input type="button" value="▼"/>	Days	<input type="text"/>	Don't block at end of term <input type="checkbox"/>
Group name	<input type="text"/>	<input type="button" value="▼"/>	Days	<input type="text"/>	Don't block at end of term <input type="checkbox"/>
Group name	<input type="text"/>	<input type="button" value="▼"/>	Days	<input type="text"/>	Don't block at end of term <input type="checkbox"/>

## Chapter 4 Advanced features

### Keeping an existing username

When a new account is created the 2CO plugin uses either the buyers email address as the username or a unique username based on their name. If email is selected as the username type then the plugin will first check for an existing Sitelok account using that email username. If found that account will be updated. The plugin can optionally check for a Sitelok account having the buyers email in the email field as well.

However you can force the plugin to update the existing logged in user account irrespective of the buyers email provided to 2CO. To do this place the 2CO buttons inside your members area and pass the existing username inside the buy button so Sitelok will use that instead. Just add this line to your button (your page with have to be .php for this).

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

Note that allowing users to change their username doesn't affect the ability of Sitelok to disable accounts when subscriptions end etc.

### Debugging

You can receive debug and error emails from the 2CO plugin which can be useful for finding problems. To do this just enter the required email address in [Send debug email to](#) on the 2CO configuration page.

### INS Passthru

If you need to pass the INS call from 2CO on to another script you can set the URL in [INS Pass Thru URL](#) on the 2CO configuration page.

### Setting custom field values

When an order is received you can have Sitelok store values from 2CO 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 2CO configuration page.

## Chapter 5 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](mailto:support@vibralogix.com)