

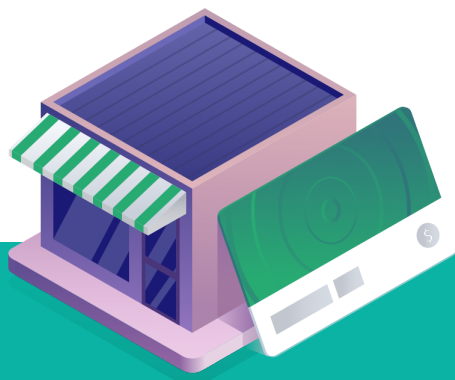
Store Credit for Magento 2.0

USER GUIDE

Version 1.0

✉ info@exto.io

🌐 <http://exto.io/magento-2-extensions.html>



Retain more money on your accounts by offering store credit to your customers.



Incentivize your customers to return to your store using store credit.



Issue refunds with store credit and refill store credit from the backend

Allow customers to decide how much to use of their credit balance.



Check out customers with store credit only or in conjunction with 'real' money.

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1. Quick Start

1.1 Installation

1. Back up your web directory and store database. You can make backup copies with any tool you find appropriate. If you are going to use the native Magento backup function, then navigate to:

[Systems](#) > [Tools](#) > [Backups](#)

and make **System** and **Database** backups

The screenshot shows the 'Backups' section of the Magento admin interface. At the top right, there is a search icon, a notification bell with '2' alerts, and a user profile for 'admin'. Below this, three red buttons are visible: 'System Backup', 'Database and Media Backup', and 'Database Backup'. A search bar with 'Search' and 'Reset Filter' buttons is present. Below the search bar, it says '0 records found' and '20 per page'. A table with columns 'Time', 'Name', 'Size(bytes)', 'Type', 'Download', and 'Action' is shown, but it is empty. A message at the bottom of the table reads 'We couldn't find any records.'

Image 1. Create backups

2. Download the Exto Store Credit installation package.
3. Upload the contents of the Exto Store Credit installation package to your store root directory.
4. In the SSH console of your server navigate to your store root folder:

```
cd path_to_the_store_root_folder
```

Then run:

```
php -f bin/magento module:enable Exto_StoreCredit
```

Next run:

```
php -f bin/magento setup:upgrade
```

Finally run:

```
php -f bin/magento cache:clean  
php -f bin/magento cache:flush
```

Flush the store cache, log out from the backend and then log in again.

1.2 Configuration

[Marketing](#) > [Exto Store Credit](#) > [Settings](#)

In the **Exto Store Credit** section, you can configure the shopping cart display message that will be shown to customers with an existing store credit balance.

Use the parameter `{available_balance}` to retrieve and display available store credit balance.

Once done, click on the **Save Config** button.

The screenshot shows the Magento 2 Configuration interface. On the left, a sidebar menu lists various configuration sections: GENERAL, CATALOG, CUSTOMERS, SALES, SERVICES, ADVANCED, EXTTO.IO, Settings, and Store Credit. The 'EXTTO.IO' section is expanded, and the 'General' sub-section is selected. The main content area displays the 'Shopping cart information text' field, which is currently set to 'You can spend **{available_balance}** from your store credit with this purchase'. A teal callout box points to this field with the text 'Configure your shopping cart display message here'. Below the field, a note states: 'This will appear in the shopping cart totals section, use {available_balance}'. In the top right corner, the 'Save Config' button is highlighted with a red border. The top navigation bar shows 'Store View: Default Config' and a user profile for 'admin'.

Image 2. Configure shopping cart display message

2. Admin Area

2.1 View customers' store credit balances

[Customer](#) > [All Customers](#)

To view a customer's store credit balance on the **All Customers** list, search for the corresponding customer. The value on the **Store Credit** column shows the total store credit balance left in the customer's account.

Customers 🔍 3 🔔 admin ▾

[Add New Customer](#)

lisa 🔍 Filters Default View ▾ Columns ▾ Export ▾

Active filters: **Keyword: lisa** 🗑️ Clear all

Actions ▾ 1 records found 20 per page < 1 of 1 >

<input type="checkbox"/>	ID ↓	Name	Store Credit	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created In	Date of Birth	Tax VAT Number	Gen
<input type="checkbox"/>	7	Lisa Hill	\$300.00	lisa.hill@explore@gmail.com	General					Oct 11, 2016 1:34:06 PM	Main Website	Confirmation Not Required	Default Store View			

Note: A red box highlights the 'Store Credit' column, and a callout bubble points to it with the text 'View customer store credit balance'.

Image 3. View Store Credit information

2.2 Manage Customer Store Credit

[Customer](#) > [All Customers](#) > [Customer Information](#) > [Store Credit](#)

Navigate to the **Store Credit** page to update a customer's store credit balance. In the **Balance Change** field, indicate the store credit value change. This value can be added or subtracted to the customer's current store credit balance. Use a (-) negative value to subtract from the customer's balance.

Include a comment on the comment section if necessary. Once done, click on the **Update Balance** button.

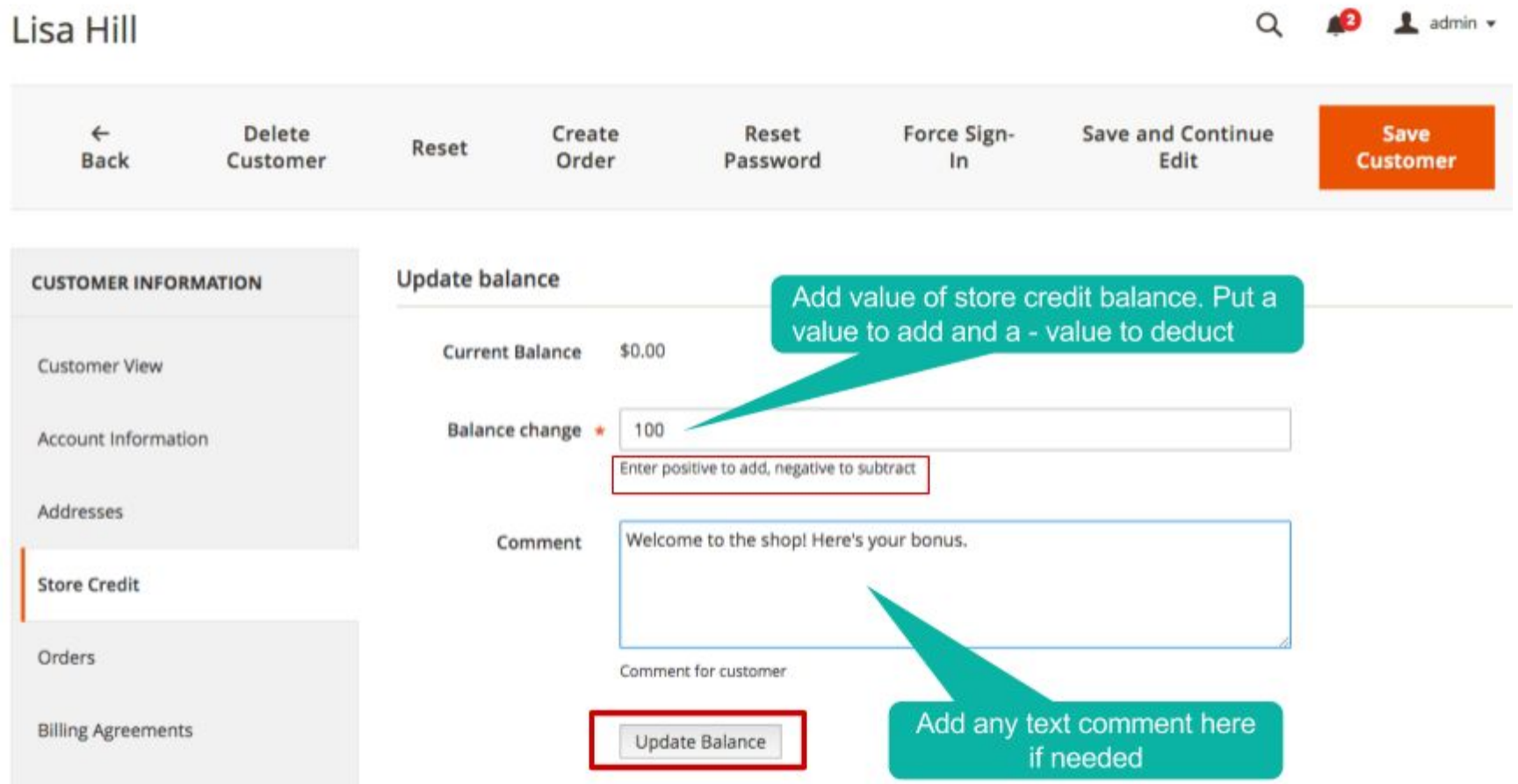


Image 4. Adding from Store Credit Balance

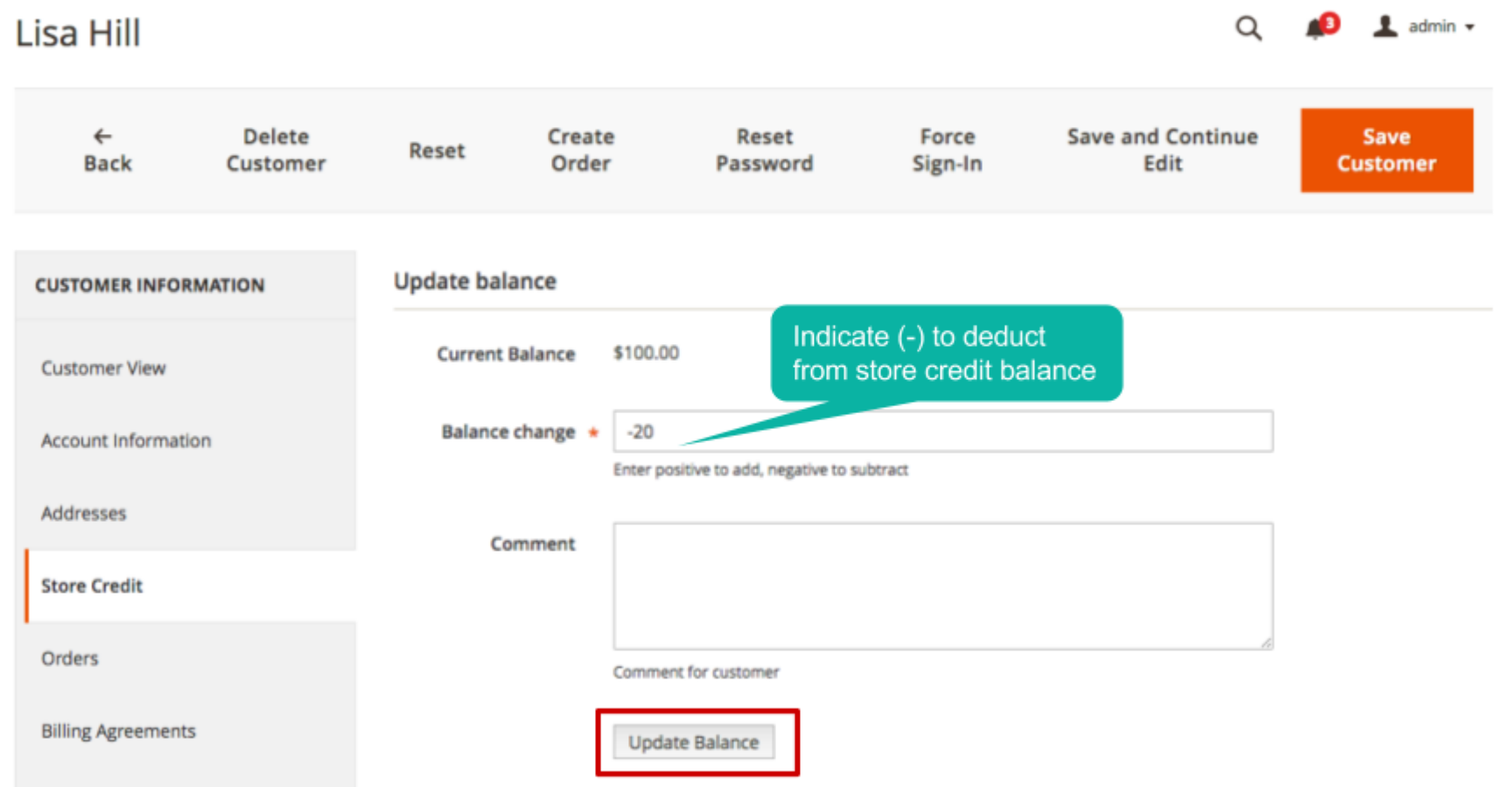


Image 5. Deducing from Store Credit Balance

Wait for the confirmation and check if the amount is reflected in the **Current Balance** field.

✔ Customer balance was updated

Update balance

Current Balance \$386.56

Balance change ★
Enter positive to add, negative to subtract

Comment

Comment for customer

Image 6. Successful Store Credit Balance Update

You may also enter a value with a decimal number but it will be rounded down to the lower value. For example, \$386.86 will be \$386 once you check on the customer details.

Scroll towards the bottom of the page to see all of the specific customer's store credit transactions. The table consists of **Transaction ID**, **Value** (green for store credit addition, red for store credit deduction), **Comment**, and **Date**.

Search [Reset Filter](#) 7 records found 20 per page 1 of 1

Transaction Id	Value	Comment	Date
<input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>
50	-127	Spent with order #000000031	Oct 11, 2016 12:06:11 PM
49	20		Sep 13, 2016 7:05:33 PM
48	300	Refund for order #000000028	Sep 13, 2016 12:08:36 PM
47	-160	Spent with order #000000028	Sep 13, 2016 12:07:08 PM
44	-50	Spent with order #000000027	Sep 2, 2016 12:13:53 PM
43	100	Celebration gift	Sep 2, 2016 12:09:42 PM
1	120		Jul 29, 2016 11:46:47 AM

Image 7. Store Credit Transactions on Customer Information

2.3 View Store Credit Usage on Order Details

Sales > Orders

To view store credit used for an actual order, go to the **Orders** list and open the corresponding entry.

Scroll down to the bottom of the **Order Information** view to see Store Credit usage information in the **Paid with Store Credit** field.

Order Total

Notes for this Order

Status

Complete ▾

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Sep 13, 2016 12:08:36 PM | Processing | Customer **Not Notified**
We refunded \$300.00 with Store Credit.

Sep 13, 2016 12:08:36 PM | Processing | Customer **Not Notified**
We refunded \$59.00 offline.

Order Totals

Subtotal	\$344.00
Shipping & Handling	\$15.00
Grand Total	\$359.00
Total Paid	\$199.00
Total Refunded	\$59.00
Paid with Store Credit	-\$160.00
Total Refunded with Store Credit	\$300.00
Total Due	\$0.00

Image 8. Store Credit Usage Information on Order Totals

2.3 Create New Order with Store Credit

Sales > Orders

Navigate to the **Orders** page and create a new order for an existing or a new customer.

Add products to the order and fill out the required Account, Address, and Shipping Information. Scroll down to the bottom of the page to the **Store Credit** section.

Indicate the amount to be applied from the customer's store credit balance. The initial field value shows the customer's remaining store credit balance.

Choose a value equal or less than the current balance. Click **Apply**.

Create New Order for Lisa Hill in Default Sto... Cancel Submit Order

Store Credit

Indicate store credit value. Value should be less than or equal to store credit balance.

50 Apply

Order Total

Order History

Order Comments

Subtotal	\$100.00
Store Credit	\$0.00
Shipping & Handling (Flat Rate - Fixed)	\$5.00
Tax	\$3.00
Grand Total	\$108.00

Append Comments
 Email Order Confirmation

Submit Order

Image 9. Creating new order using store credit for payment

Once you click on the **Apply** button, the page will reload and the **Order Totals** section will be updated along with the value for the **Store Credit** field

Store Credit

Order Total

Order History

Order Comments

Order Totals

Subtotal	\$100.00
Shipping & Handling (Flat Rate - Fixed)	\$5.00
Tax	\$3.00
Store Credit	\$50.00
Grand Total	\$58.00

 Append Comments Email Order Confirmation

Image 10. Store Credit Information

IMPORTANT NOTICE

Store Credit deductions will be final after clicking on the **Submit Order** button.

You can change the applied store credit value any time before submitting the order.

If you indicated a value larger than the store credit balance, an error message will appear.

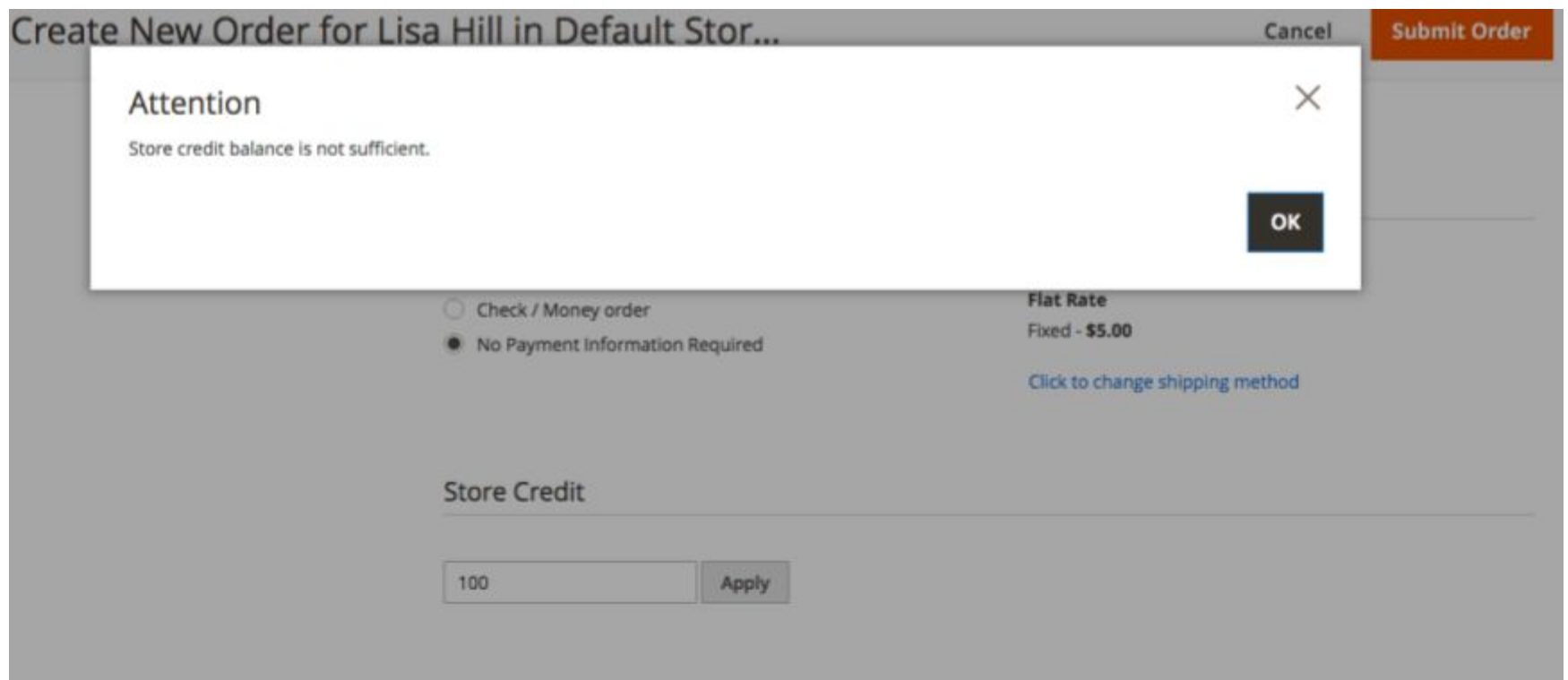


Image 11. Insufficient store credit balance

Click on the **Submit Order** button to finish creating the order.

2.4 Refund with Store Credit

[Sales](#) > [Orders](#) > [Credit Memos](#)

When refunding orders, admin users can opt to refund it to store credit balance.

Create a new credit memo and indicate a value in the **Refund with Store Credit** field. You can choose to indicate the whole amount or a portion of the refund total to the customer's store credit balance.

Click on the **Refund Offline** button to complete the Refund request.

New Memo
← Back Reset

Order Total

Credit Memo Comments

Comment Text

Refund Totals

Subtotal	\$100.00
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Refund with Store credit	<input type="text" value="108"/>
Tax	\$3.00
Grand Total	\$108.00

Append Comments

Email Copy of Credit Memo

Refund Offline

Image 12. Refunding to store credit balance

2.7 View Store Credit Transactions

[Marketing](#) > [Exto Store Credit](#) > [Transactions](#)

To view a list of all Store Credit transactions, navigate to the **Exto Store Credit** menu.

The table consists of **Transaction ID**, **Customer Name**, **Amount** (green for Store Credit balance addition, red for Store Credit balance deduction), **Comment**, and **Created At** date.

Transactions

54 records found

200 per page

<input type="checkbox"/>	Transaction ID	Customer Name	Amount	Comment	Created At
<input type="checkbox"/>	54	Lisa <see.hear.explore@gmail.com>	108	Refund for order #000000033	2016-10-14 07:20:51
<input type="checkbox"/>	53	Lisa <see.hear.explore@gmail.com>	-50	Spent with order #000000033	2016-10-14 07:01:33
<input type="checkbox"/>	52	Lisa <see.hear.explore@gmail.com>	-20		2016-10-14 02:50:44
<input type="checkbox"/>	51	Lisa <see.hear.explore@gmail.com>	100	Welcome to the shop! Here's your bonus.	2016-10-12 16:55:30

Image 12. Viewing Store Credit Transactions

The **Comment** column may contain the following comments:

- Any text comment included when adding or subtracting a value for customer's store credit balance
- **Spent with order #xxxxxxx** - Default comment for store credit transactions used to pay for new orders
- **Refund for order #xxxxxxx** - Default comment for refunds to store credit balance
- **Purchased with order #xxxxxxx** - Default comment for adding a value to store credit balance through store credit product purchases

3. Customer Area

3.1 My Store Credit

User's Account > My Store Credit

When customers log in to their online store account, customers will see the **My Store Credit** section at the bottom of the left side menu.

Once a customer clicks on this section, the customer will see all previous store credit related transactions, including refunds to store credit, additional value due to purchase of store credit product, and store credit deduction from past orders. The store credit balance is shown at the top area of the page.

The customer will see the details of store credit transactions including the **Transaction Number**, **Comment**, **Value**, and **Date** of transaction.

The screenshot shows the 'My Store Credit' page in a Magento 2 user account. The page features a navigation menu on the left with options like 'Account Dashboard', 'Account Information', 'Address Book', 'My Downloadable Products', 'My Orders', 'Newsletter Subscriptions', 'My Credit Cards', 'My Product Reviews', 'Billing Agreements', 'My Wish List', and 'My Store Credit' (highlighted with a red box). The main content area displays the title 'My Store Credit' and a message: 'Your current store credit balance is \$398.00' (highlighted with a red box). Below this is a table of transactions with columns for 'Transaction #', 'Comment', 'Value', and 'Date'.

Transaction #	Comment	Value	Date
57		\$11.00	2016-10-14 08:58:06
56		\$125.00	2016-10-14 08:55:47
55		\$124.00	2016-10-14 08:55:30
54	Refund for order #000000033	\$108.00	2016-10-14 07:20:51
53	Spent with order #000000033	-\$50.00	2016-10-14 07:01:33
52		-\$20.00	2016-10-14 02:50:44
51	Welcome to the shop! Here's your bonus.	\$100.00	2016-10-12 16:55:30

Image 13. User Account - My Store Credit view

3.2 Order View Page

[User's Account](#) > [My Orders](#)

Customers will see store credit used per order in the **My Orders** page.

If store credit was applied for a particular order, customers will be shown the **Paid with store credit** field. This field will contain the corresponding store credit value used.

If store credit was not used for the order, the field is not displayed.

Category 1 Category 2

Account Dashboard
Account Information
Address Book
My Downloadable Products
My Orders
Newsletter Subscriptions
My Credit Cards
My Product Reviews
Billing Agreements
My Wish List
My Store Credit

Compare Products
You have no items to compare.

Order # 000000033 COMPLETE

October 14, 2016
[Reorder](#) [Print Order](#)

Items Ordered Invoices Refunds

Product Name	SKU	Price	Qty	Subtotal
Product 1	Product 1	\$100.00	Ordered: 1 Refunded: 1	\$100.00
Subtotal				\$100.00
Shipping & Handling				\$5.00
Paid with store credit				-\$50.00
Tax				\$3.00
Grand Total				\$58.00

Image 14. User Account - Order with Store Credit Usage

4. Shopping Cart

4.1 Shopping Cart Summary

Customers have the option to apply remaining store credit balance after proceeding to checkout.

On the checkout page, a customer can choose to pay a part or all of the total order amount using store credit. Note that the store credit section is only displayed for customers with existing store credit balance.

IMPORTANT NOTICE

Order Summary section shows the maximum value of store credit that can be used for the particular order. Customers should check [User's Account](#) > [My Store Credit](#) to view total remaining store credit balance.

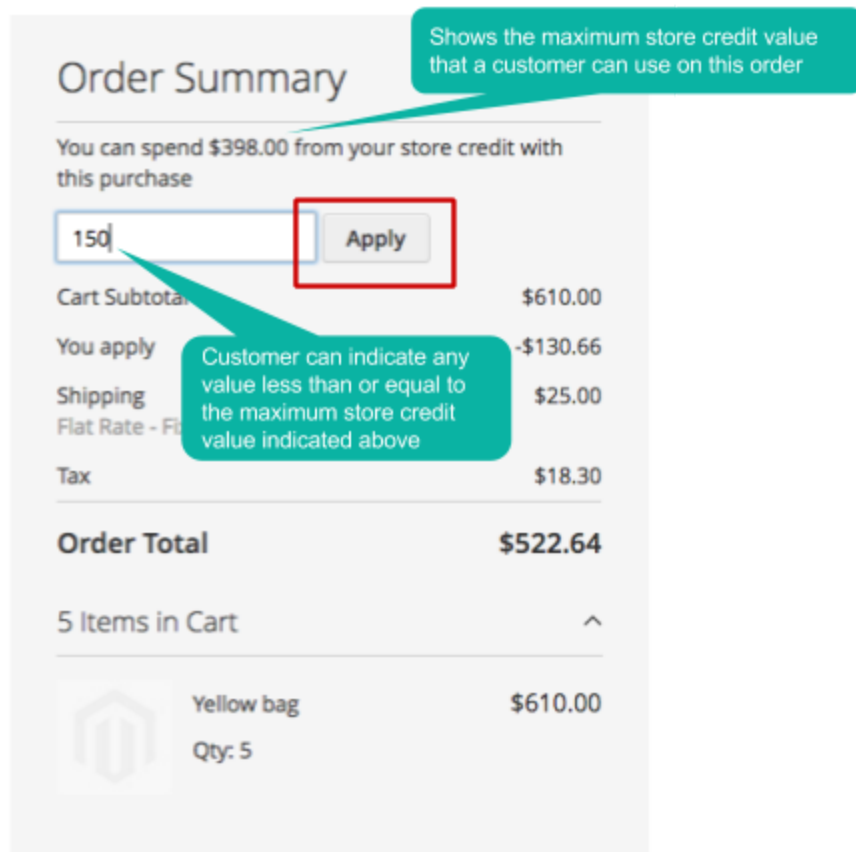


Image 15. Shopping Cart Order Summary

The indicated value should be less than or equal to the value stated in the message “*You can spend \$\$\$ from your store credit with this purchase*”.

If a customer enters a value higher than the stated maximum store credit value in the message, any of these 2 will happen:

- If the total order amount is less than the customer’s store credit balance, the value will be automatically corrected to the full amount of the order except the cents or decimal part. For example, if the total is \$11.85, \$11 will be deducted from store credit and the remaining \$0.85 should be settled via other payment options.
- If the total order amount is greater than the customer’s store credit balance, the error message below will be shown.

Order Summary

You can spend \$398.00 from your store credit with this purchase

✖ Store credit balance is not sufficient.

Cart Subtotal	\$610.00
Shipping Flat Rate - Fixed	\$25.00
Tax	\$18.30
Order Total	\$522.64

5 Items in Cart ^


 Yellow bag	\$610.00
Qty: 5	

Image 16. Store Credit balance is insufficient

Upon clicking on **Apply**, customer will see a *successfully applied* message along with the computation of the Order Total.

Order Summary

You can spend \$398.00 from your store credit with this purchase

✔ Your credit was successfully applied.

Cart Subtotal	\$610.00
You apply	-\$120.00
Shipping Flat Rate - Fixed	\$25.00
Tax	\$18.30
Order Total	\$533.30

5 Items in Cart ^


 Yellow bag	\$610.00
Qty: 5	

Image 17. Store Credit applied

IMPORTANT NOTICE

Store Credit deductions will be final after clicking on the **Submit Order** button.

The customer can change the applied store credit value any time before submitting the order.