Store credit – Magento 2

USER MANUAL

Supported Version: 2.0, 2.1, 2.2, 2.3, 2.4

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Preface:

- This Mageants Store credit is a extension for the store owners who wants to automated refund system. Visitor can use store currency in next order and also get return store currency amount if order is cancelled.

  The extension is providing below functionalities.

  • Enable / Disable module configurations.

  • Admin can add custom store amount to enhance customer loyalty.

  • Customer can spend their store credit amount on purchase and also get quickly refund order amount with store credit.

  • Admin can track customer's refund and store credit amount.

  • Notify customers to every change in their store credit balance.

Installation:

There are two ways of installing extension in magento2.

      1) Using COMMAND LINE.
      2) Manually install extension.

Option 1: Magento 2 install extension using COMMAND LINE (Recommended).

      Follow below steps to install extension from the command line.

Step 1: Download the extension and unzip it.

Step 2: Upload it to code directory in your magento installation's app directory. If code directory does not exists then create.

Step 3: Disable the cache under System → Cache Management.

Step 4: Enter the following at the command line:
php bin/magento setup:upgrade
php bin/magento setup:static-content:deploy

Step 5: Once you complete above steps log out and log in back to the admin panel and switch to Stores → Configuration → Mageants → Store Credit. The module will be displayed in the admin panel.

Option 2: Magento 2 install extension manually.

Step 1: Download the extension and unzip it.

Step 2: Upload it to code directory in your magento installation's app directory. If code directory does not exists then create.

Step 3: Disable the cache under System → Cache Management Edit app/etc/config.php file and add one line code: 'Mageants_StoreCredit' → 1

Step 4: Disable the cache under System → Cache Management

Step 5: Once you complete above steps log out and log in back to the admin panel and switch to Stores → Configuration → Mageants → Store Credit, the module will be displayed in the admin panel.
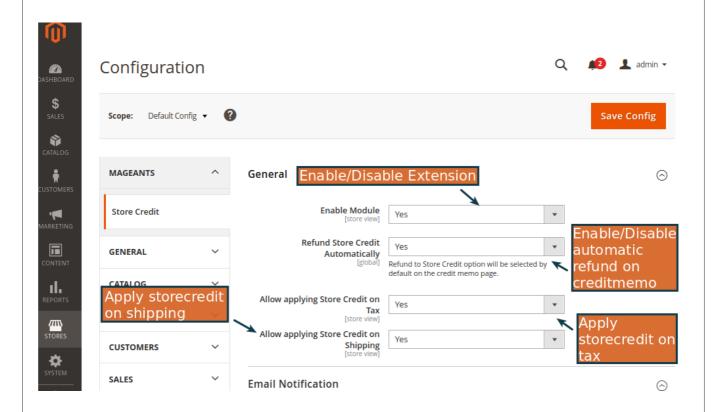
Backend example

After Installation of Extension login to magento admin panel to set configuration of the extension.
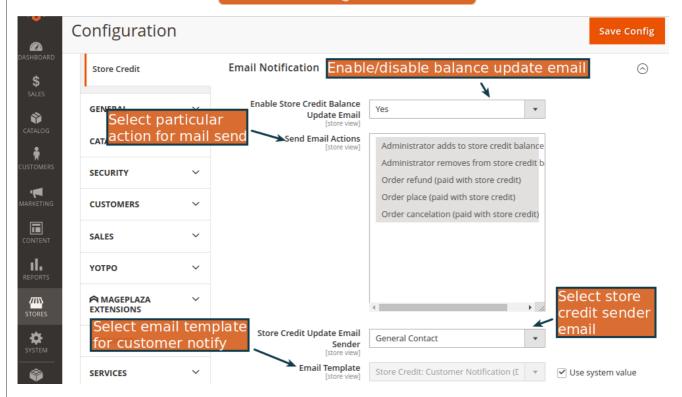
Extension Configuration

As per below screen shot you can set all the settings here.

You can find configuration at Stores -> Configuration -> Mageants -> Store credit.

Enable Module : Here you can enable and disable module from back end.

Refund Store credit Automatically : Choose yes to refund store credit amount on credit card by default.

Allow applying Store Credit on Tax : Choose yes to allow customers apply store credit amount on taxs.

Allow applying Store Credit on Shipping : Choose yes to allow customers apply store credit amount on shipping amount.

Enable Store Credit Balance Update Email : Select yes to enable notify to customer about store credit balance update.

Send Email Actions : Select particular actions which you want to send notification your customer.

Store Credit Update Email Sender : Select your company contact which will be used in email sender.
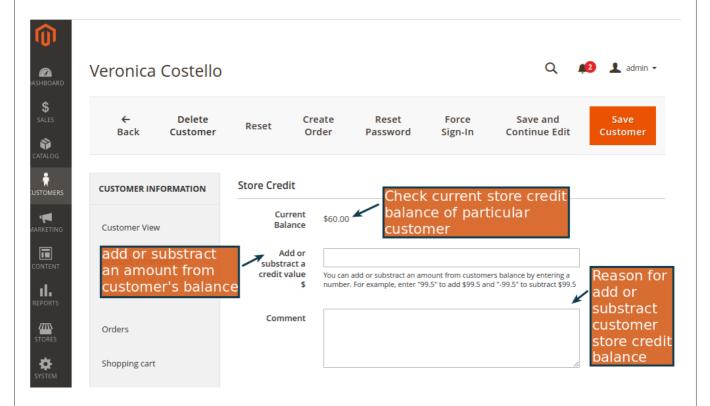
Store Credit Reply To : Select contact for reply.

Email Template : Select email template for customer notify.

Customers Store credit balance Grid

To get information about customer's balance and use of store credit amount history.

You can find store credit tab at Customers -> All Customers -> edit particular customer
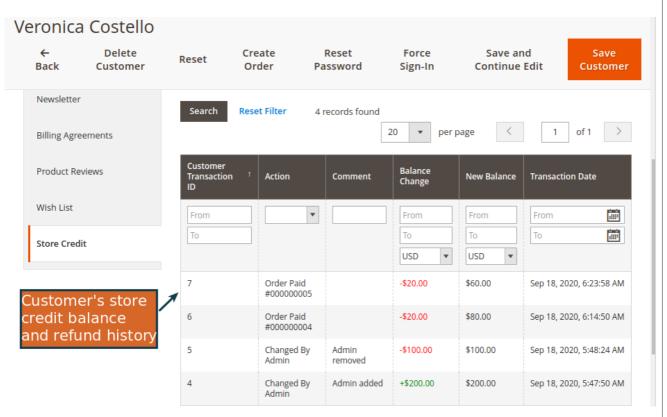

Current Balance : Check current balance of particular customer.

Add or substract store credit value : You can add or substract an amount from customer's balance by entering a number. For example, enter "99.5" to add $99.5 and "-99.5" to subtract $99.5.

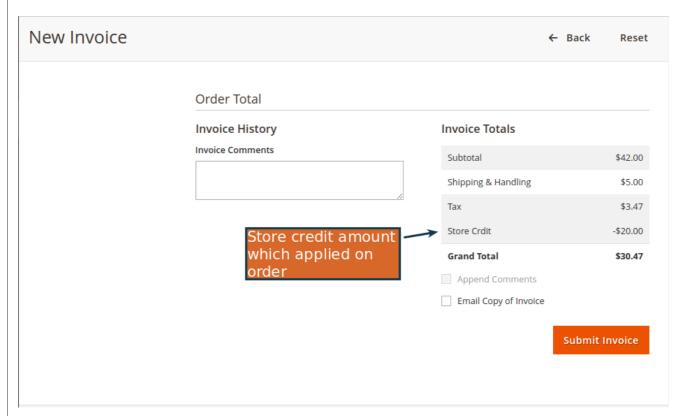**Comment :** Reason for add or substract an amount from customer's balance.

→ Customer's store credit balance update and refund history.

Order invoice

→ store credit amount display in order invoice which applied on order.

Sales -> Orders -> particular order invoice

New Invoice   ← Back   Reset

Order Total

Invoice History   **Invoice Totals**

Invoice Comments

Subtotal	$42.00
Shipping & Handling	$5.00
Tax	$3.47
Store Crdit	-$20.00
Grand Total	**$30.47**

Store credit amount which applied on order

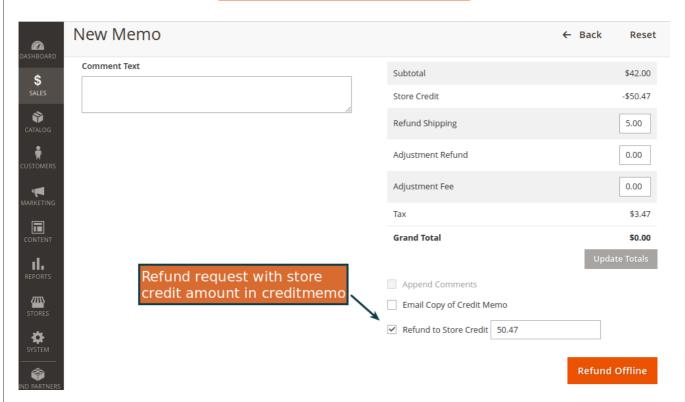☐ Append Comments

☐ Email Copy of Invoice

Submit Invoice

New credit memo

→ store credit amount display in order creditmemo which applied on order.

Sales -> Orders -> particular order credit memo.

New Memo   ← Back   Reset

Comment Text

Subtotal	$42.00
Store Credit	-$50.47
Refund Shipping	5.00
Adjustment Refund	0.00
Adjustment Fee	0.00
Tax	$3.47
Grand Total	**$0.00**

Update Totals

Refund request with store credit amount in creditmemo

☐ Append Comments

☐ Email Copy of Credit Memo

☑ Refund to Store Credit   50.47

Refund Offline

→ Tick refund to store credit option so you can generate refund request with store credit amount. (fully or partially)
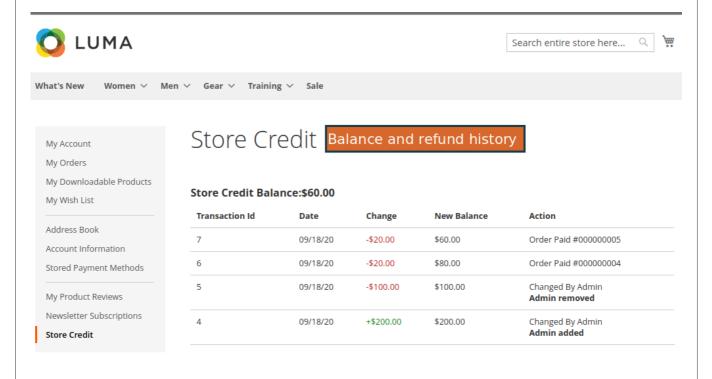
Front-end example

Using this Extension customer can use their store credit amount in order and also get refund store credit balance.

Store credit amount history

You can find store credit history at My account -> store credit tab

→ Customer can see their current store credit balance and refund history in my account store credit tab.

Checkout page

→ Customer can apply or cancel store credit amount on checkout page.

Payment Method

Check / Money order

☑ My billing and shipping address are the same

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
(555) 229-3326

Store credit amount substract from order amount

[Place Order]

Apply Discount Code ⌄

Apply and cancel store credit amount

Apply Store Credit ⌃

You have $60.00 on your Store Credit account
Applied store credit amount is $20.00

[Cancel Store Credit]

Order Summary

Cart Subtotal	$42.00
Store Credit	-$20.00
Shipping Flat Rate - Fixed	$5.00
Tax	$3.47
Order Total	**$30.47**

1 Item in Cart ⌄

Ship To: ✎

Veronica Costello
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Calder, Michigan 49628-7978
United States
(555) 229-3326

Thank you!

if you have any questions or feature suggestions, please contact us at:
https://www.mageants.com/contact-us

Your feedback is absolutely welcome!