



M2 STORE CREDIT & REFUND

USER GUIDE

Version 1.0.0

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1. INTRODUCTION

- Our Store Credit and Refund Magento 2 extension allows you to provide a store credit to the customer instead of doing the refund. Keep the hard-earned money in your store and also increase customer satisfaction and reduce customer disappointment.
- **No technical knowledge required!** You can flexibly set up your store credit settings as per your ~~requirements~~

Let's take a look at its Features below:

Features:

- Admin can add or remove the store credit balance in the customer account.
- If store credit is added to or removed from a customer's account, customers will be notified through email.
- If the available store credit balance is used to place the order, customers will be notified.
- If a customer's order was placed using store credit and then cancelled, the applied store credit balance will be restored to the customer's account.
- Customers will be notified if an order placed with a store credit balance is cancelled.
- Customers can allow store credit to apply on shipping and tax.
- If a credit memo is created for the order, customers can allow store credit to be refunded automatically.
- Customers can also manually enter the store credit amount when creating a credit memo to refund the store credit.
- Customers can check the balance of their unused store credit in their account dashboard.
- On the customer dashboard, all operations conducted on the store credit balance will be displayed in detail. Customers can also track the activity on their store credit balance.
- In the particular customer account, the admin can track the activity on the customer's store credit.

- On the checkout screen, customers can apply or cancel the selected store credit.
- The amount of store credit will be shown in the Order emails.
- The store credit can be checked in the order details by the admin.

2. HOW TO USE AND CONFIGURE

This section will guide you to configure Rootways Store credit and refund Extension and how to use all of it's features

You have to manage Store credit from two places, first one from **Configuration** setting and second one from each **Customer account** in the admin.

2.1 General Settings:

2.1.1 General:

This section will show you how to manage Store Credit from **Configuration** settings. Log in to **Admin Panel** and then click **STORES → Configuration → ROOTWAYS EXTENSIONS → Store Credit**. Below is the Screen shot for Store credit Settings.

The screenshot displays the 'General' configuration page for the 'Store Credit' extension. The interface includes a sidebar with 'ROOTWAYS EXTENSIONS' and 'Store Credit' sections. The main content area shows the following settings:

- Status:** Extension Activated.
- Enable:** A dropdown menu set to 'Yes' with a 'Use system value' checkbox checked.
- License Key:** A text input field containing 'm2_storecredit' with a note: 'Please enter license key for this extension that was emailed by us to you after your purchase.'
- Refund Store Credit Automatically:** A dropdown menu set to 'Yes' with a 'Use system value' checkbox checked.
- Is Multi Store:** A dropdown menu set to 'No' with a note: 'If your website has multiple stores with different URLs then set this option to Yes and contact us at help@rootways.com for register multi-store license key.'
- Allow applying Store Credit on Tax:** A dropdown menu set to 'Yes' with a 'Use system value' checkbox checked.
- Allow applying Store Credit on Shipping:** A dropdown menu set to 'Yes' with a 'Use system value' checkbox checked.

The detailed description of each setting is as below:

- **Enable:** Enable/Disable Store credit and refund extension using this setting. If it is disabled, then the store credit field will not be displayed on the checkout page
- **Refund Store Credit Automatically:** This will allow you to automatically refund the store credit when you generate the credit memo for the order
- **Allow applying Store Credit on Tax:** if "Yes" then you can allow store credit to be applied to the TAX rates on the checkout page.
- **Allow applying Store Credit on Shipping:** if "Yes" then you can allow store credit to be applied to the shipping rates on the checkout page.

2.1.2 Email Notification:

From this section you can configure the Email templates settings for the store credit transactions

Email Notification ⊞

Enable Store Credit Balance Update Email [store view] Use system value

Send Email Actions [store view] Use system value

Admin adds to store credit balance
 Admin removes from store credit balance
 Order place (paid with store credit)
 Order refund (paid with store credit)
 Order cancelation (paid with store credit)

Store Credit Update Email Sender [store view] Use system value

Email Template [store view] Use system value

- **Enable Store Credit Balance Update Email:** if “Yes” then customers will get an email when any operations is being performed on the store credit. Below is the list of possible store credit operations:
 - **Admin adds store credit in customer account**
 - **Admin removes store credit from the customer account**
 - **The order is placed using store credit**
 - **The order is cancelled and store credit is being restores**
 - **The order gets refunded with store credit**

Customer will get an email for each of the above operations

- **Send Email Actions:** this setting represents possible actions/operations that can be performed no the store credit
- **Store Credit Update Email Sender:** using this setting you can set the email sender for the store credit emails
- **Email Template:** using this setting you can set the email template store credit email.

2.2 Store credit Management:

This section will guide you how to manage Store credit from each customer account. Go to **Admin → Customers → All Customers**. Over here you can select individual customer account. On the customer account page go to **“Store Credit”**.

StoreCredit Balance: You can add or remove the store credit for the customer. This page will display outstanding store credit balance for the particular customer.

| Balance | Points | Message | Created |
|---------|--------|--|---------------------------|
| | | | From <input type="text"/> |
| | | | To <input type="text"/> |
| 64 | -10 | Updated by admin (Test User) | Mar 22, 2022, 3:40:32 AM |
| 74 | +27 | StoreCredit were added for the refunded order 000000016 | Mar 22, 2022, 3:38:06 AM |
| 47 | -27 | Storecredit Balance redeemed for order 000000016 | Mar 22, 2022, 3:32:55 AM |
| 74 | +22 | Storecredit balance were restore for the cancelled order 000000015 | Mar 22, 2022, 3:28:25 AM |
| 52 | -22 | Storecredit Balance redeemed for order 000000015 | Mar 22, 2022, 3:25:14 AM |
| 74 | +74 | StoreCredit were added for the refunded order 000000014 | Mar 22, 2022, 3:12:10 AM |
| 0 | -62.12 | Storecredit Balance redeemed for order 000000014 | Mar 22, 2022, 3:07:40 AM |
| 62.12 | -10 | Updated by admin (Test User) Comment: "remove credit" | Mar 22, 2022, 3:04:08 AM |
| 72.12 | +10 | Updated by admin (Test User) | Mar 22, 2022, 3:03:29 AM |
| 62.12 | -10 | Updated by admin (Test User) Comment: "remove credit" | Mar 22, 2022, 2:59:28 AM |
| 72.12 | +5 | Updated by admin (Test User) Comment: "add test credit" | Mar 22, 2022, 2:56:05 AM |
| 67.12 | +10 | Updated by admin (Test User) Comment: "add test credit" | Mar 22, 2022, 2:47:31 AM |

StoreCredit Balance Transactions: This section will display the list of operation that are performed on the store credit.

2.3 Store credit on the front end:

2.3.1 Store credit on the Checkout page:

On the payment step of the checkout page the customer will see the Store credit field at the bottom. Using this field, the customer can apply/cancel the store credit

The screenshot displays the LUMA checkout interface. At the top, the LUMA logo is on the left, and a progress bar shows 'Shipping' as completed and 'Review & Payments' as the current step. Below the progress bar, the 'Payment Method' section is active, showing 'Check / Money order' as the selected method. A checkbox is checked for 'My billing and shipping address are the same', with the address details: Office Test, 5 Northeastern Blvd, Bedford, New Hampshire 03101, United States, and phone number 4165875498. A blue 'Place Order' button is positioned to the right of the address. Below the address, there is a section for 'Apply Store Credit' which is highlighted with a red box. It shows 'You have StoreCredit Balance (\$64.00)' and an input field containing the number '64', with an 'Apply Store Credit' button next to it. To the right of the main form is an 'Order Summary' box showing 'Cart Subtotal' at \$106.00, 'Shipping Flat Rate - Fixed' at \$5.00, and a total of \$111.00. Below the summary, it lists '1 Item in Cart' with a dropdown arrow, showing 'Sinbad Fitness Tank' with a quantity of 1 and a price of \$106.00. At the bottom right, the 'Ship To:' address is repeated: Office Test, 5 Northeastern Blvd, Bedford, New Hampshire 03101, United States, 4165875498.

2.3.2 Store credit in customer dashboard:

Customer can also view their outstanding store credit balance on “**Store Credit & Refund**” in the dashboard. Customer can check the history of store credit transaction on this page.

- My Account
- My Orders
- My Downloadable Products
- My Wish List

- Address Book
- Account Information
- Stored Payment Methods

- My Product Reviews
- Newsletter Subscriptions
- Store Credit & Refund**

Compare Products

You have no items to compare.

Recently Ordered

Store Credit & Refund

Store Credit Balance

You have StoreCredit Balance (\$64.00).

Store Credit Transactions

| New Balance | Change | Message | Date |
|-------------|----------|--|------------------|
| 64.0000 | -10.0000 | Updated by admin. | 3/22/22, 3:40 AM |
| 74.0000 | 27.0000 | StoreCredit were added for the refunded order 000000016 | 3/22/22, 3:38 AM |
| 47.0000 | -27.0000 | Storecredit Balance redeemed for order 000000016 | 3/22/22, 3:32 AM |
| 74.0000 | 22.0000 | Storecredit balance were restore for the cancelled order 000000015 | 3/22/22, 3:28 AM |
| 52.0000 | -22.0000 | Storecredit Balance redeemed for order 000000015 | 3/22/22, 3:25 AM |
| 74.0000 | 74.0000 | StoreCredit were added for the refunded order 000000014 | 3/22/22, 3:12 AM |

2.3.3 Store credit in order details

On the front-end customer can check added store credit in the order history.

- My Account
- My Orders**
- My Downloadable Products
- My Wish List

- Address Book
- Account Information
- Stored Payment Methods

- My Product Reviews
- Newsletter Subscriptions
- Store Credit & Refund

Compare Products

You have no items to compare.

Order # 000000003 CLOSED

March 13, 2022

[Reorder](#) [Print Order](#)

Items Ordered

Invoices

Refunds

| Product Name | SKU | Price | Qty | Subtotal |
|---------------------|-------|-----------------|---------------------------|-----------------|
| Luma Analog Watch | 10011 | \$110.00 | Ordered: 1 Refunded: 1 | \$110.00 |
| Subtotal | | | | \$110.00 |
| Shipping & Handling | | | | \$5.00 |
| StoreCredit Balance | | | | -\$50.00 |
| Grand Total | | | | \$65.00 |

My Account

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

My Product Reviews

Newsletter Subscriptions

Store Credit & Refund

Order # 000000003 CLOSED

March 13, 2022

Reorder Print Order

Items Ordered
Invoices
Refunds

[Print All Invoices](#)

Invoice #000000001 [Print Invoice](#)

| Product Name | SKU | Price | Qty Invoiced | Subtotal |
|---------------------|-------|-----------------|--------------|-----------------|
| Luma Analog Watch | 10011 | \$110.00 | 1 | \$110.00 |
| Subtotal | | | | \$110.00 |
| Shipping & Handling | | | | \$5.00 |
| StoreCredit Balance | | | | -\$50.00 |
| Grand Total | | | | \$65.00 |

Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.

My Account

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

My Product Reviews

Newsletter Subscriptions

Store Credit & Refund

Order # 000000003 CLOSED

March 13, 2022

Reorder Print Order

Items Ordered
Invoices
Refunds

[Print All Refunds](#)

Refund #000000001 [Print Refund](#)

| Product Name | SKU | Price | Qty | Subtotal | Discount Amount | Row Total |
|------------------------------------|-------|-----------------|-----|-----------------|-----------------|----------------|
| Luma Analog Watch | 10011 | \$110.00 | 1 | \$110.00 | \$0.00 | \$110.00 |
| Subtotal | | | | | | \$110.00 |
| Shipping & Handling | | | | | | \$5.00 |
| StoreCredit Balance | | | | | | \$50.00 |
| Store Credit Total Refunded | | | | | | \$50.00 |
| Grand Total | | | | | | \$65.00 |

Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.

2.4 Store credit in admin order details

Admin can view the store credit applied by the customers in the order details, invoice and credit memo. If the order was refunded or canceled then refunded or restored store credit will also be displayed in the order details.

2.4.1 Order details

This section will display the initial store credit which was applied by the customer while placing an order.

Order Total

Notes for this Order

Status

Processing ▼

Comment

Notify Customer by Email

Visible on Storefront

Submit Comment

Order Totals

| | |
|-----------------------|-----------------|
| Subtotal | \$187.00 |
| Shipping & Handling | \$5.00 |
| StoreCredit Balance | -\$15.00 |
| Grand Total | \$177.00 |
| Total Paid | \$177.00 |
| Total Refunded | \$0.00 |
| Total Due | \$0.00 |

2.4.2 Order Invoice

When admin create an invoice for any order then the invoice will display the applied store credit.

Invoice Totals

| | |
|---------------------|-----------------|
| Subtotal | \$187.00 |
| Shipping & Handling | \$5.00 |
| StoreCredit Balance | -\$15.00 |
| Grand Total | \$177.00 |

2.4.3 Credit Memo

Our extension will allow the admin to refund the order total in terms of store credit balance rather than refunding actual money. when admin tries to create the credit memo for the order they will be asked if they want to refund the full/partial store credit amount.

| Refund Totals | |
|-----------------------------|--------------------------------|
| Subtotal | \$187.00 |
| Refund Shipping | <input type="text" value="5"/> |
| Adjustment Refund | <input type="text"/> |
| Adjustment Fee | <input type="text"/> |
| Tax | \$0.00 |
| Store Credit Balance | -\$15.00 |
| Refund Store Credit Balance | \$192.00 |
| Grand Total | \$0.00 |

Append Comments

Email Copy of Credit Memo

Refund to Store Credit

2.5 Store credit emails

Customer and admin will get an email each timer whenever there is any operation performed on the store credit.

That's how easy it is to use Magento 2 Store credit and Refund by Rootways. Please contact us for any queries regarding Magento and custom web-development of Ecommerce websites.

Our website: <https://rootways.com/>

Email: help@rootways.com

Phone: [1-855-766-8929](tel:1-855-766-8929)

Our team is working on the newer version of Rootways Store credit and Refund with an extra ordinary feature that you've never seen with any extension!!!

THANK YOU
