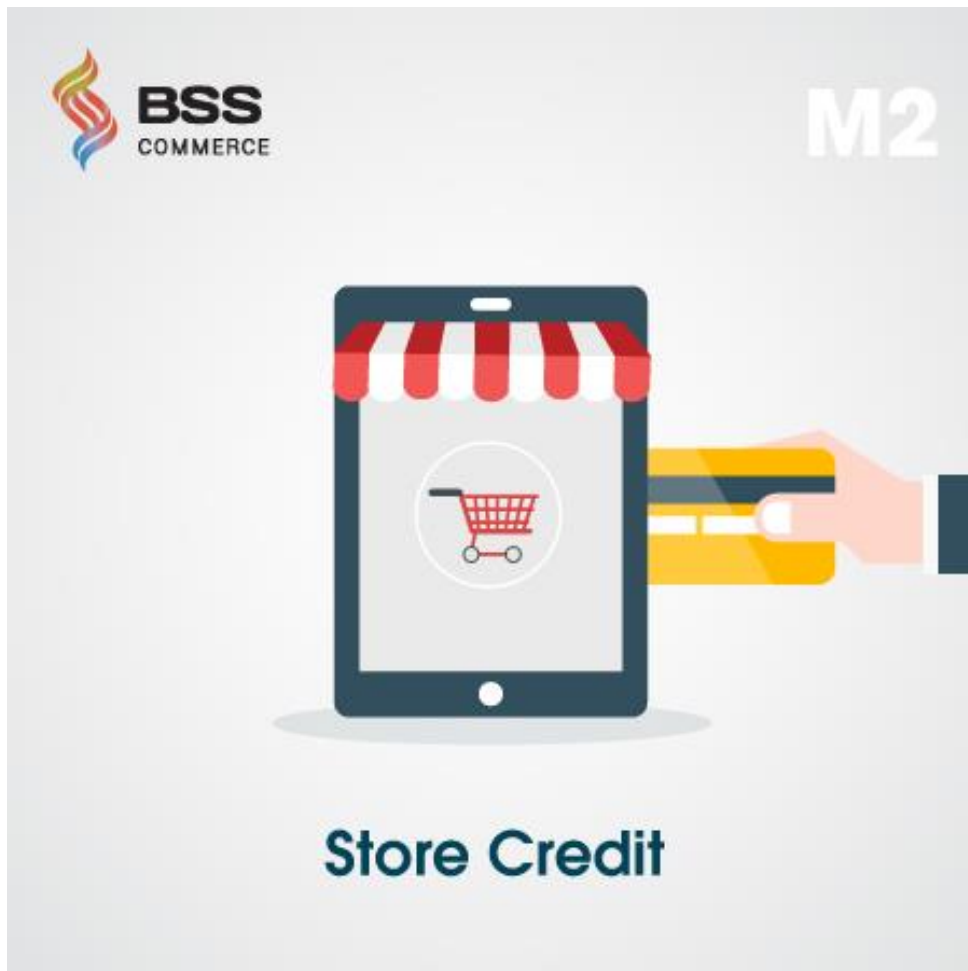




STORE CREDIT FOR MAGENTO 2

USER GUIDE



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1. Store Credit for Magento 2 Overview

[Magento 2 Store Credit extension](#) is a useful tool that can help you increase customer loyalty. Every customer will have their own store credit and they can use their store credit to pay for orders. With store owners, they can use store credit for cash refunds and freely add store credit for customers.

2. How Does Store Credit for Magento 2 Work?

2.1. General Configuration

Please go to **Store → Configuration → BSSCommerce → Store Credit**

General

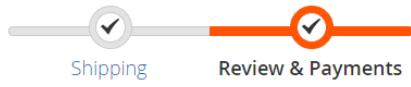
Enabled <small>[store view]</small>	Yes	▼
Version 1.0.0		
Use Store Credit in Checkout Page <small>[store view]</small>	Yes	▼
Use Store Credit in Shopping Cart <small>[store view]</small>	No	▼
Allow Applying Store Credit to Shipping <small>[store view]</small>	No	▼
Allow Applying Store Credit to Tax <small>[store view]</small>	Yes	▼

Email Configuration

Store Credit Update Email Template <small>[store view]</small>	Update Store Credit (Default)	▼
Store Credit Update Email Sender <small>[store view]</small>	General Contact	▼

In **Enabled**: choose Yes to enable the extension, or No to disable it.

In **Use Store Credit in Checkout Page**: choose Yes to allow customers to apply store credit to pay for order in the checkout page, or No to not allow.



Payment Method:

- Cash On Delivery
 - Bank Transfer Payment
 - Check / Money order
- Apply Discount Code ▾

Apply Store Credit ▲

Your Store Credit: \$230.57

Apply Cancel

Use Store Credit to pay for order in the checkout page

Cart Subtotal Excl. Tax	\$45.00
Cart Subtotal Incl. Tax	\$48.71
Store Credit	-\$40.00
Shipping Flat Rate - Fixed	\$5.00
Tax	\$3.71
Order Total	\$13.71
1 Item in Cart	▾


Ship To: 

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
[\(555\) 229-3326](tel:(555)229-3326)

In Use Store Credit in Shopping Cart: choose Yes to allow customers to apply store credit to pay for order in the shopping cart page, or No to not allow.

Shopping Cart

Success.

Item	Price	Qty	Subtotal
 Aim Analog Watch	\$48.71 Excl. Tax: \$45.00	1	\$48.71 Excl. Tax: \$45.00

Move to Wishlist ✎ 🗑️

Update Shopping Cart

Apply Store Credit ^

Your Store Credit: \$260.57

Apply Cancel

Apply store credit to pay for order in the shopping cart

Summary

Estimate Shipping and Tax ^

Subtotal (Excl. Tax)	\$45.00
Subtotal (Incl. Tax)	\$48.71
Store Credit	-\$10.00
Tax	\$3.71
Order Total	\$38.71

[Proceed to Checkout](#)

[Check Out with Multiple Addresses](#)

Apply Discount Code ^

In Allow Applying Store Credit to Shipping:

- Choose Yes to allow applying store credit to pay for shipping fee, the shipping fee will be paid by store credit if the customer applies a store credit value in shopping cart or checkout page more than the order total.
- Choose No to not allow using store credit to pay for tax even if the customer applies a store credit value more than the order total.

Note: In case you disable both 2 configs “**Use Store Credit in Checkout Page**” and “**Use Store Credit in Shopping Cart**”, which means that there aren’t fields to enter store credit value, shipping fee can’t be paid by store credit even if you enable or disable this config.

In Allow Applying Store Credit to Tax: choose Yes to allow applying store credit to pay for tax, or No to not allow. This function operates the same as “**Allow Applying Store Credit to Shipping**” function.

Note: If you allow customers to apply store credit for both shipping fee and tax, then the purchaser enters a store credit value more than the order total in the shopping cart or checkout page, the payment method options will be automatically hidden and the customer can place order immediately without selecting payment method.

Payment Method:

No Payment Information Required

My billing and shipping address are the same

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

If you apply store credit value more much than the grand total of order, the order will be paid totally by store credit and you won't have to select payment method in the checkout page.

Place Order

Apply Discount Code ▾

Apply Store Credit ▲

Your Store Credit: \$216.86

Apply

Cancel

Order Summary

Cart Subtotal Excl. Tax	\$45.00
Cart Subtotal Incl. Tax	\$48.71
Store Credit	-\$53.71
Shipping Flat Rate - Fixed	\$5.00
Tax	\$3.71

Order Total \$0.00

1 Item in Cart ▾

Ship To:

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

❖ Email Configuration:

In **Store Credit Update Email Template**: select an email template to send customers information about store credit update. You can go to **Marketing** → **Email Templates** to edit or add new email template as you want.

In **Store Credit Update Email Sender**: select an available email sender of your website.

After setting, you need to press **Save Config** button to save your configuration then flush cache to start using the module.

2.2. Manage customer's store credit in the backend

Please go to **Customers** → click on **Edit** link of a customer to explore the customer information page, then press **Store Credit** tab.

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Newsletter
- Product Reviews
- Billing Agreements
- Wish List
- Store Credit

Statistic

1 records found 20 per page < 1 of 1 >

Current Balance	Website
\$216.86	Main Website

Balance

Website: Main Website Select Website

Update Value:
Update Amount. Prefix - for down.

Comment:

Notify Customer: No Send mail to customer.

History

Search [Reset Filter](#) 12 records found 20 per page < 1 of 1 >

Transaction ID	Type	Change	Balance	Is Notified	Website	Updated At	Additional Info
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	From <input style="width: 100%;" type="text"/> To <input style="width: 100%;" type="text"/>	From <input style="width: 100%;" type="text"/> To <input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	From <input style="width: 100%;" type="text"/> To <input style="width: 100%;" type="text"/>	
82	Used in order	-\$53.71	\$216.86	Yes	Main Website	Nov 6, 2017, 3:59:35 PM	Order # 00000061
77	Used in order	-\$48.71	\$270.57	Yes	Main Website	Nov 2, 2017, 11:54:30 AM	Order # 00000059
47	Refund	+\$73.00	\$319.28	Yes	Main Website	Nov 1, 2017, 3:03:18 PM	Credit Memo # 00000034
42	Refund	+\$44.64	\$246.28	Yes	Main Website	Nov 1, 2017, 2:51:37 PM	Credit Memo # 00000029

In **Statistic** section, there is a grid displaying current store credit balance correlated to website in the top of the page.

In **Balance** section, you can update the store credit balance of customer.

- **Website:** select website to update store credit in this website. Please make sure that you Shared Customer Accounts globally to associate the account to all websites. (go to **Store** → **Configuration** → **Customers** → **Customer Configuration** → **Account Sharing Options**, in **Share Customer Accounts**, select **Global** option)

- **Update Value:** enter a number to update store credit amount, add – in the number prefix to subtract the store credit balance.
- **Comment:** add comment about store credit update
- **Notify Customer:** choose Yes to send customer notification email about store credit update, or No to not send.

In **History** section, you can view store credit transaction history of the customer in a grid. This grid includes:

- **Transaction ID** column: number of transaction.
- **Type** column: the action makes store credit balance change
- **Change** column: the amount of store credit was added or subtracted.
- **Balance** column: store credit balance after the transaction took place
- **Is Notified** column: customer was notified about the transaction or not.
- **Website** column: website that the transaction happened.
- **Updated at** column: the specific time and date that the transaction happened.
- **Additional Info** column: more information about the transaction, you can click on links to view orders or credit memos.

Note: the **Statistic** and **History** section are also displayed in the customer information page in the frontend for customer.

After your customization, you need to press **Save Customer** button to save your settings.

2.3. Refund to Store Credit when creating Credit Memos and use Store Credit to pay for orders created in the backend.

2.3.1. Create Credit Memos

When creating credit memos, you can choose **Refund to Store Credit** option to transfer the refund to customer store credit.

Refund Totals

Subtotal	\$32.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Tax	\$0.00
Store Credit	-\$32.00
Grand Total	\$0.00

- Append Comments
- Email Copy of Credit Memo
- Refund to Store Credit

Refund to store credit when create credit memo

Refund Offline

2.3.2. Create Orders in the backend

Items Ordered Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Erika Running Short-32-Red SKU: WSH12-32-Red	Excl. Tax: \$45.00 Incl. Tax: \$48.71 <input type="checkbox"/> Custom Price*	<input type="text" value="1"/>	Excl. Tax: \$45.00 Incl. Tax: \$48.71	\$0.00 <input checked="" type="checkbox"/> Apply	Excl. Tax: \$45.00 Incl. Tax: \$48.71	Please select <input type="button" value="v"/>
Total 1 product(s)	Subtotal:		\$48.71	\$0.00	\$48.71	

* - Enter custom price excluding tax

Apply Coupon Code

Store Credit
Customer Credit Balance: \$213.71

Update Items and Quantities

Apply store credit when create order in the backend

2.4. Store Credit Transaction Report

2.4.1. Store Credit Transaction

Please go to **Admin Panel** → **BSS Store Credit** → **Transactions** to view information of all store credit transactions in your site.

Transactions

Store View: All Websites ▾ ⓘ

Search [Reset Filter](#) 82 records found 20 ▾ per page 1 of 5 < >

Transaction ID ↑	Customer	Email	Balance Change	Balance	Action	Date	Additional Info
<input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	
82	Veronica Costello	roni_cost@example.com	-\$53.71	\$216.86	Used in order	Nov 6, 2017, 3:59:35 PM	Order # 00000061
81	Bss Tester	testmagento321@gmail.com	-\$30.00	\$460.00	Used in order	Nov 3, 2017, 5:56:43 PM	Order # 300000004
80	Bss Tester	testmagento321@gmail.com	+\$81.00	\$1,484.46	Refund	Nov 3, 2017, 4:06:07 PM	Credit Memo # 00000051
79	Bss Tester	testmagento321@gmail.com	-\$10.00	\$490.00	Update	Nov 3, 2017, 2:46:49 PM	
78	Bss Tester	testmagento321@gmail.com	+\$500.00	\$500.00	Update	Nov 3, 2017, 2:46:04 PM	hello
77	Veronica Costello	roni_cost@example.com	-\$48.71	\$270.57	Used in order	Nov 2, 2017, 11:54:30 AM	Order # 00000059
76	Bss Tester	testmagento321@gmail.com	\$0.00	\$1,403.46	Update	Nov 2, 2017, 10:02:16 AM	

- **Transaction ID** column: number of transaction.
- **Customer** column: customer name linked to customer information page in the backend.
- **Email** column: email of customer.
- **Balance Change** column: the amount of store credit was added or subtracted.
- **Balance** column: store credit balance after the transaction took place
- In **Action** column: the action makes store credit balance change
- **Date** column: the specific time and date that the transaction happened.
- **Additional Info** column: more information about the transaction, you can click on links to view orders or credit memos.

2.4.2. Summary Store Credit Transaction Chart Report

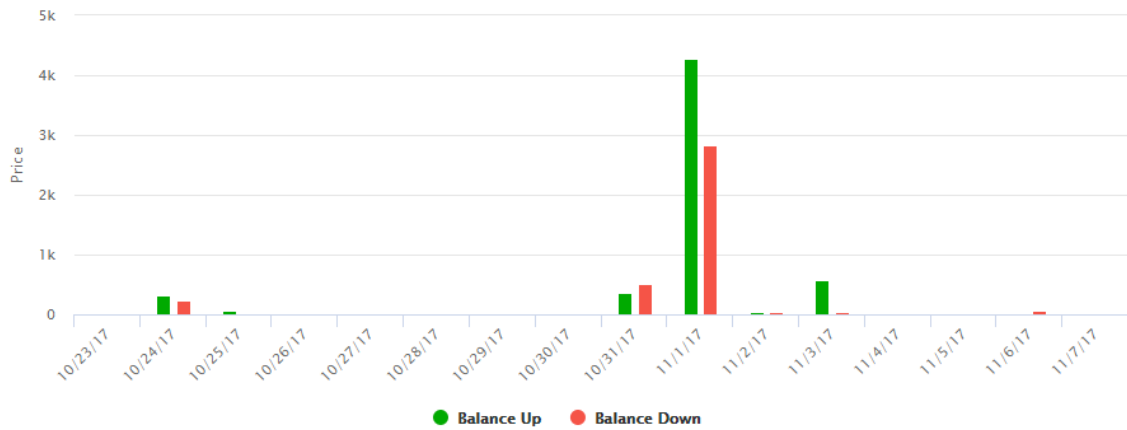
Please go to **Admin Panel** → **BSS Store Credit** → **Report**.

Report

🔍 🔔 👤 admin ▾

From: To: Show By: ▾

Store Credit Report



The chart displays the summary store credit increment and decrement in your site, you can set the duration time and select to view the report of store credit by day, month or year, then press **Refresh** button to view the chart exported from your settings.

3. Contact Us



Free 1-year
Support



Free Lifetime
Update



Free
Installation

Any questions or concern about us, feel free to contact:

Website: <http://bsscommerce.com>

Support: support@bsscommerce.com

Skype: support.bsscommerce

BSS Support team is always ready to aid you with any issue referring to our products. Additionally, we also give you Website development and Administration Support.

We do offer:

1. Free installation services for commercial products.
2. Free updates within offered support period.

Our duties:

1. Responsibility for resolving product bugs.
2. Help with technical queries.
3. Technical support in installation and product usage.

