

Store Credit and Refund

For Magento 2



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Getting Around

Magento 2 Store Credit and Refund introduces store credits that can be beneficially utilized by shoppers towards purchases. The Admin can monitor transactions and other statistics of individual customers; refund orders automatically into store credits, apply credit on shipping and tax, send automatic store credit notifications by email, etc.

Compatibility: Magento Open Source 2.3.X - 2.4.X, Magento Commerce using on-prem (EE) 2.3.X - 2.4.X, Magento Commerce on Cloud (ECE) 2.3.X - 2.4.X.

For support please contact: awsupport@aheadworks.com

Introducing Store Credit and Refund

Overview

Store Credit and Refund extension allows processing refunds and promoting additional sales with the in-store currency - the store credit:

- Automatic refunding of orders into store credit;
- Email notifications;
- Manual updates and mass actions;
- Credit balance at the store front pages;
- Prices, discounted by store credit;
- Credit checkout;
- Dedicated customer account section;
- Integration with Smart One Step Checkout.

Short Description

The extension introduces an in-store currency - the store credit. Store credits can be used to refund orders and award customers on various occasions. To issue a refund, the Store-owner proceeds to the credit memo of the order and clicks 'Refund' button,

'Refund to store credit' checkbox is ticked by default. The order is then refunded in full to the Customer, who can spend credits towards purchase of any product in the store.

On Backend, Store Credit and Refund offers two grids: 'Transactions' and 'Customers'. The former provides an overview of all credit transactions and allows adding/subtracting store credit from customer accounts either one by one or via mass actions. The Customers grid provides an overview of customer store credit balances. It, furthermore, comes with reference links to customer accounts.

On Frontend, the extension adds a dedicated section to the customer's account. In the 'Store Credit & Refund' section customer can track all credit transactions and subscribe to credit balance updates. In addition the store credit balance of the customer can be displayed in the header of all store pages. Moreover every product page can have a price discounted by the available store credit displayed.

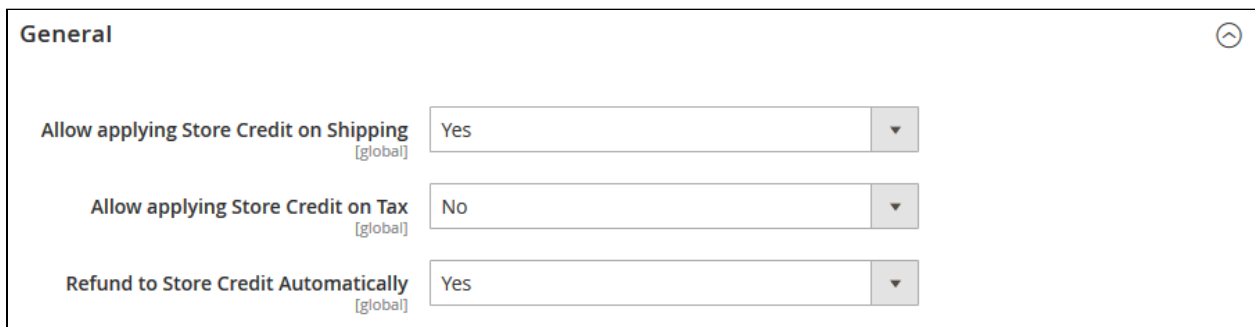
Known Issues

The present version of the extension (v. 1.1.6) does not support *Multishipping Addresses Checkout* (store credit balance is not shown on the Checkout page and can not be applied).

Extension Settings

Before using the extension the Storeowner proceeds to the extension settings page that can be found at Stores > Configuration > Aheadworks Extensions > Store Credit and Refund.

General



General ⌵

Allow applying Store Credit on Shipping [global] Yes ▼

Allow applying Store Credit on Tax [global] No ▼

Refund to Store Credit Automatically [global] Yes ▼

General settings control default extension's behavior and define how the store credit should be applied to orders:

- **Allow applying Store Credit on Shipping** - if enabled customers can pay for shipping with store credit;
- **Allow applying Store Credit on Tax** - if enabled customers can pay order taxes with store credit;
- **Refund to Store Credit Automatically** - if enabled the checkbox 'Refund to Store Credit' at the credit memo page is ticked by default allowing one click refunds.

Storefront

Storefront ⌵

Store Credit Balance in Top Link
[website] Yes

Hide the top-link if Store Credit balance is empty
[website] Yes

Display prices discounted by available Store Credit
[website] Yes

Storefront section controls the extension's behavior on the Frontend and where the extension blocks are displayed:

- **Store Credit Balance in Top Link** - defines if the available store credit balance of the customer is displayed in the page header;
- **Hide the top-link if Store Credit balance is empty** - defines if 'Store Credit Balance in Top Link' is displayed if customer does not have store credit available;
- **Display prices discounted by available Store Credit** - defines if the notification on how much customer can save by paying with credit balance is

displayed below product price.

The screenshot shows a product page for 'Compete Track Tote'. At the top, a dark grey navigation bar contains the text 'Welcome, John!', 'Your Store Credit Balance: \$184.00', and 'Create an Account'. Below this is a search bar with the placeholder 'Search entire store here...' and a shopping cart icon. A red callout box points to the search bar with the text 'Store credit balance available at all store pages'. The product title 'Compete Track Tote' is displayed in large black font, with a 4.5-star rating and '2 Reviews' below it. A red callout box points to the price '\$32.00' with the text 'Price discounted with available store credit can be displayed at all product pages'. To the right of the price, it says 'IN STOCK' and 'SKU#: 24-WB02'. Below the price, a message states: 'Your Store Credit balance is \$184.00. You can purchase this product for FREE. You can apply Store Credit on checkout.' There is a quantity selector set to '1' and a blue 'Add to Cart' button.

The present version of the extension (v. 1.1.6) does not support *Multishipping Addresses Checkout* (store credit balance is not shown on the Checkout page and can not be applied).

Email Notifications

The screenshot shows the 'Email Notifications' configuration interface. It includes the following settings:

- Subscribe Customers to Store Credit Notifications by Default** [website]: Yes
- Sender** [website]: General Contact
- Balance Update** [store view]: Balance update (Default)
- Store Credit Balance Notifications Sent When** [store view]: A dropdown menu is open, showing three options: 'Balance adjusted by admin', 'Order canceled', and 'Refund by Store Credit'.

Email Notifications controls how the credit balance updates are delivered to customers:

- **Subscribe Customers to Store Credit Notifications by Default** - is enabled all customers will receive email notifications on credit balance updates;
- **Sender** - defines the email address from which all email notifications are sent;
- **Balance Update** - defines the email template of the balance notifications;
- **Store Credit Balance Notifications Sent When** - defines on what conditions the balance updates are sent:
 - *Balance adjusted by admin;*
 - *Order cancelled;*
 - *Refund by Store Credit;*
 - *Reimburse of spent Store Credit;*
 - *Store Credit used in order.*

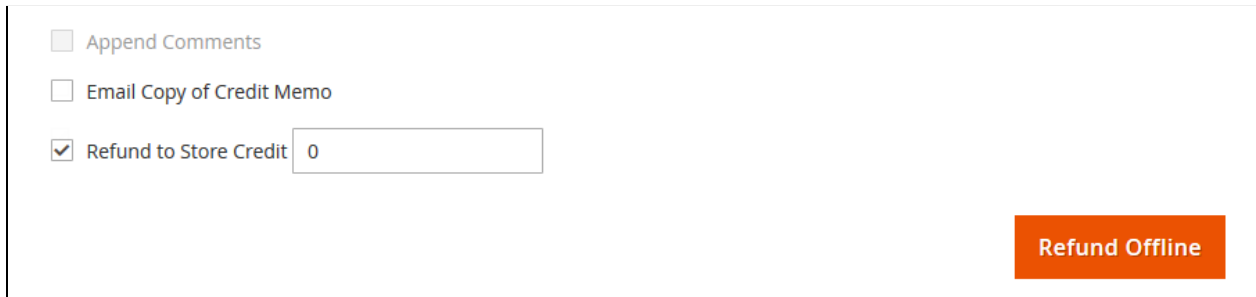
To change the email template the Storeowner navigates to **Marketing > Email Templates**, creates new template and in the field 'Template' selects **Aheadworks_StoreCredit > Balance** update template to save as new.

Store Credit spent on the cancelled order is refunded automatically to the Customer's balance.

Once done with the settings the Storeowner clicks **Save Config** button to apply the changes made.

Issuing Refunds

To issue a refund to store credit Storeowner navigates to the required order at **Sales > Orders** and proceeds to the Credit Memo of the order.



The screenshot shows a form with three checkboxes: 'Append Comments' (unchecked), 'Email Copy of Credit Memo' (unchecked), and 'Refund to Store Credit' (checked). Next to the checked checkbox is an input field containing the number '0'. In the bottom right corner of the form is an orange button labeled 'Refund Offline'.

At the bottom of the page the Storeowner can see a '**Refund to Store Credit**' checkbox with a field allowing for manual store credit input:

- By default the Grand Total value of the order is specified in the field;
- If required the Storeowner can specify any value from 0 to Order Grand Total to partially refund order to store credit;
- Refund to Store Credit field value cannot exceed Order Grand Total value.

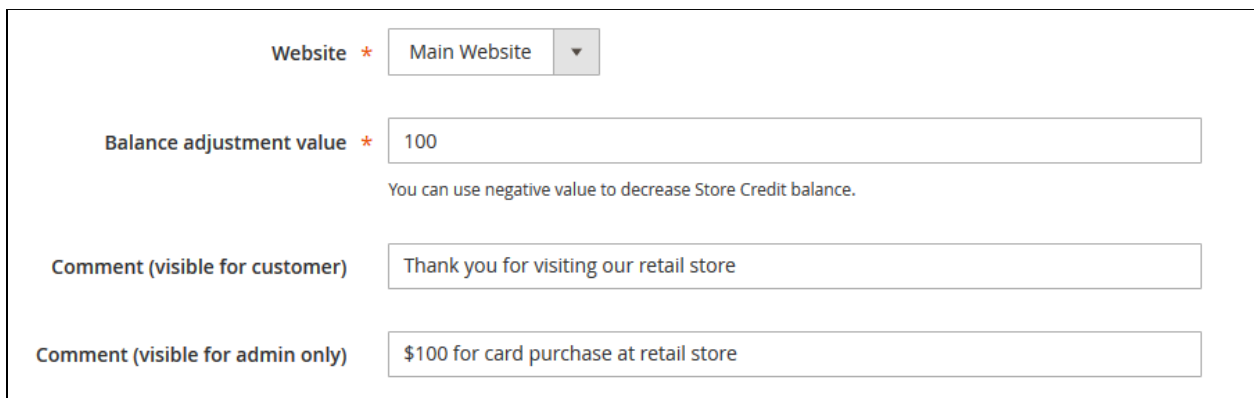
Manual Transactions

Store Credit and Refund extension supports manual transactions allowing the storeowner updating customer's credit balance whenever required. To manually update credit balance the storeowner navigates to **Marketing > Store Credit & Refund by Aheadworks > Transactions**.

Transactions grid comes with the following interactive elements:

- "Columns" button allows customizing the grid look by hiding, applying columns. Some columns may be excessive and some relevant to the current tasks;
- "Filters" button allows looking for particular transactions depending on the filters selected;
- "Default View" button allows saving the perfect grid look to quickly load it whenever required.

To add new transaction the store owner clicks  button.



Website * Main Website ▼

Balance adjustment value * 100
You can use negative value to decrease Store Credit balance.

Comment (visible for customer) Thank you for visiting our retail store

Comment (visible for admin only) \$100 for card purchase at retail store

Store Credit and Refund extension supports manual transactions allowing the storeowner updating customer's credit balance whenever required. To manually update credit balance the storeowner navigates to **Marketing > Store Credit & Refund by Aheadworks > Transactions**.

To add new transaction the storeowner clicks Add New Transaction button.

At the New Transaction page the storeowner specifies:

- **Website** - the store view the transaction should be made for;
- **Balance adjustment value** - how much store credit should be added/subtracted from customer(s) account(s);
- **Comment (visible for customer)** - a short message on the transaction for customer;

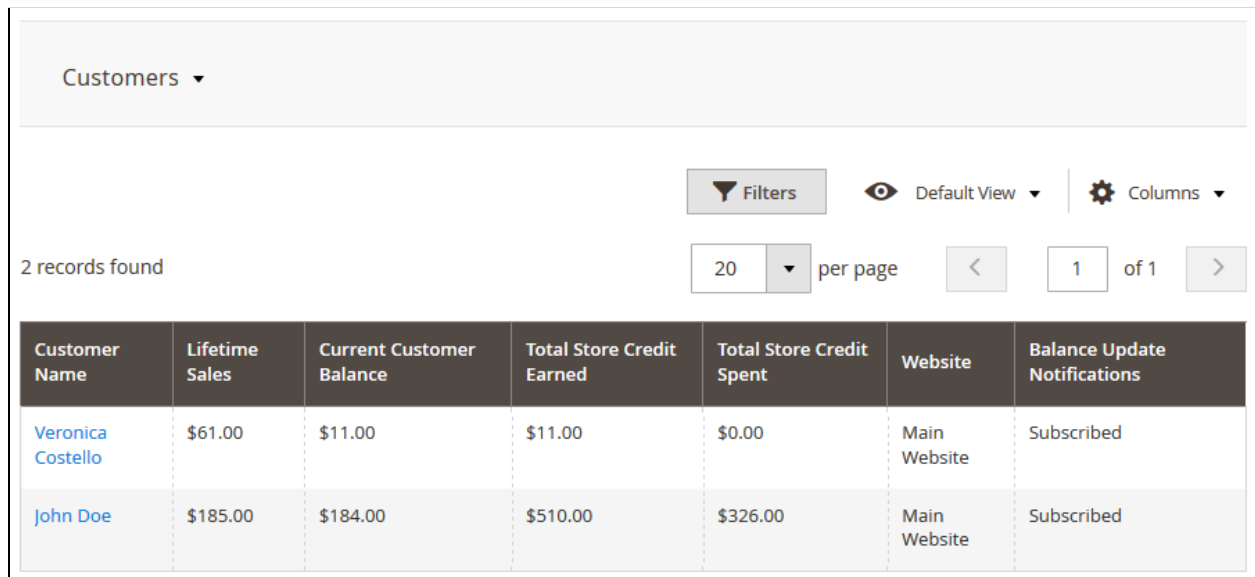
- **Comment (visible for admin only)** - a short message for the store administrator.

When done with the transaction options the storeowner is suggested to select customer(s) by clicking **Add Customers** button. Once customer(s) is selected the storeowner clicks **Save Transaction** button.

New transaction is now displayed in the Transactions grid.

Tracking Customer Balance

For the performance tracking and understanding how many customers have active store credit balance the extension introduces **Customers** grid that can be accessed via **Marketing > Store Credit & Refund by Aheadworks > Customers**.

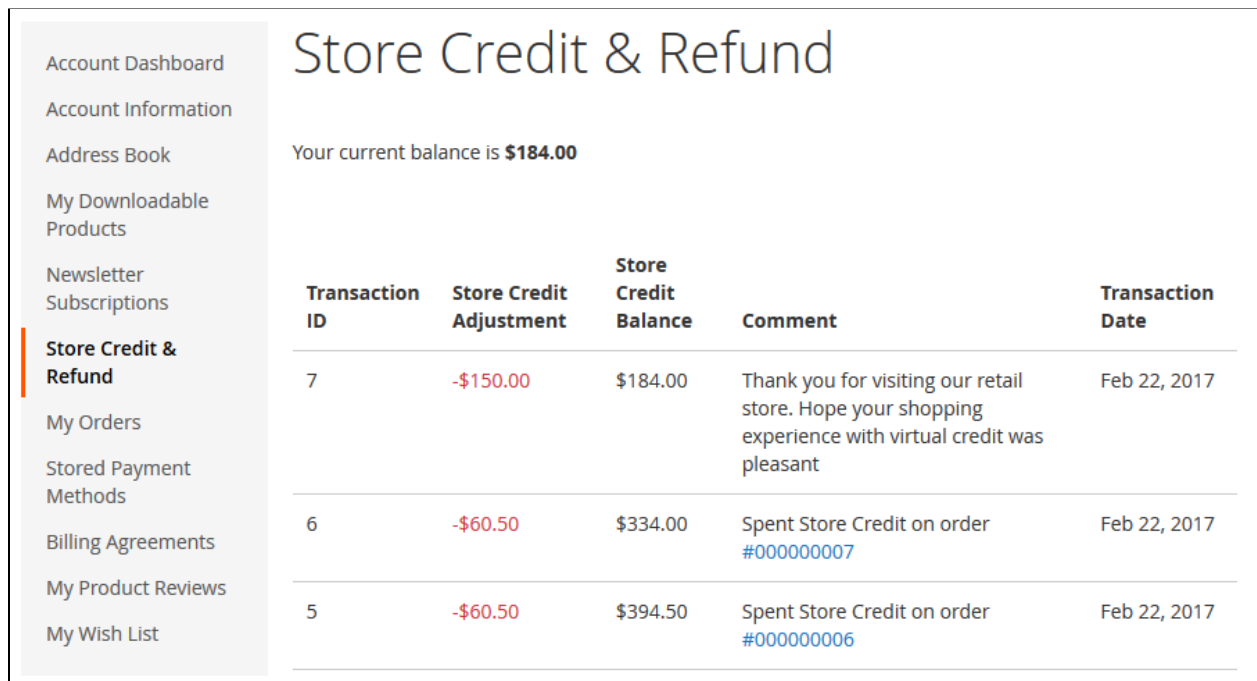


Customer Name	Lifetime Sales	Current Customer Balance	Total Store Credit Earned	Total Store Credit Spent	Website	Balance Update Notifications
Veronica Costello	\$61.00	\$11.00	\$11.00	\$0.00	Main Website	Subscribed
John Doe	\$185.00	\$184.00	\$510.00	\$326.00	Main Website	Subscribed

The grid comes with the same interactive elements as Transactions grid. Here the storeowner can get an overview of the store credit earn-spent history and see if customer(s) is subscribed to the balance updates.

Customer Account Section

Store Credit and Refund extension introduces its section to the customer account dashboard.



Store Credit & Refund

Your current balance is **\$184.00**

Transaction ID	Store Credit Adjustment	Store Credit Balance	Comment	Transaction Date
7	-\$150.00	\$184.00	Thank you for visiting our retail store. Hope your shopping experience with virtual credit was pleasant	Feb 22, 2017
6	-\$60.50	\$334.00	Spent Store Credit on order #000000007	Feb 22, 2017
5	-\$60.50	\$394.50	Spent Store Credit on order #000000006	Feb 22, 2017

At the Store Credit & Refund section customers can find the following:

- Current store credit balance;
- All store credit transactions;
- Order references;
- Subscription to store credit balance updates.

Note:

Some extension features are similar to the default Magento features on Enterprise Edition:

- 1) Two "Refund to Store Credit" fields appear on the "New Memo" page.
- 2) Two "Store Credit" tabs appear on the checkout "Payment Information" page (If a customer has a balance at the default EE Store Credit).
- 3) "Store Credit & Refund" and "Store Credit" pages appear on the account page.

For an in-depth look visit Store Credit and Refund demo store at the [extension's product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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