

# X-Payments:Using X-Payments with Magento 2

A Magento 2 store can be connected to [X-Payments](#) web-based payment application to process payments from customers and save their credit card data in a PCI DSS compliant way.

This section provides information on how to connect X-Payments to your Magento 2 store and how to handle payments in your Magento 2 store using X-Payments.

## Connecting Magento 2 to X-Payments

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Connecting your Magento 2 store to X-Payments includes two consecutive steps:

- [Configure the connection to your Magento 2 store in the X-Payments back end](#)
- [Configure the connection to X-Payments in the Magento 2 store Administrator panel](#)

## Using X-Payments with Magento 2: Customer experience

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- [Magento 2 checkout routine when using X-Payments](#)

## Using X-Payments with Magento 2: Administrator experience

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- [Reviewing payment information for X-Payments orders when using X-Payments with Magento 2](#)
- [Capturing payments when using X-Payments with Magento 2](#)
- [Issuing refunds when using X-Payments with Magento 2](#)
- [Canceling payments when using X-Payments with Magento 2](#)

## Configure the connection to your Magento 2 store in the X-Payments back end

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To begin the process of connecting to your Magento 2 store, log in to the admin back end of your X-Payments and complete a few preliminary steps that will enable your X-Payments to connect to your Magento 2 store and to the payment gateway through which your customers' payments will be processed.

More information on configuring X-Payments is available in the section "[Configuring X-Payments](#)" of the [X-Payments user manual](#).

Complete the following steps:

1. Log in to X-Payments as administrator.
2. Provide your X-Payments application with data required to connect to your chosen payment gateway.

1. In the X-Payments back end, go to the 'Payment Configurations' page (**Settings -> Payment configurations**):

Session expires in: 314:07 [Settings](#) [Profile](#) [Help](#)

**Some encryption keys for encrypting Online store <-> X-Payments requests and responses have not been renewed yet. Please renew the keys.**

- General settings
- Online stores
- Payment configurations**
- Encryption keys
- Users

Currency: USD	Since last login	Today	This week	This month
Total payments amount	\$347.95	\$0.00	\$347.95	\$555.83
Total handled amount New plus Authorized	\$0.00	\$0.00	\$0.00	\$59.93
Total charged amount Charged	\$62.45	\$0.00	\$62.45	\$62.45
Total declined amount Declined	\$0.00	\$0.00	\$0.00	\$0.00
Total refunded amount Refunds	\$0.00	\$0.00	\$0.00	\$0.00

**Summary**

[On-line stores: 8](#)  
required adjusting: 0

[Payment configurations: 4](#)  
required adjusting: 0

[Users: 2](#)  
inactive: 1  
on-line: [Ambal\(admin\)](#)

Cardholder data storing: **disabled**

2. From the **New configuration** drop-down box, select the payment module that X-Payments should use to connect to the payment gateway that will process your Magento store payment transactions.
3. Click **Add new**.
4. On the page that opens, enter all the required configuration parameters.
5. Click **Save** to save the changes. You have created a payment configuration.
6. Make sure the payment configuration you have created is enabled.
3. Provide your X-Payments application with data required to connect to your Magento 2 store:
  1. In the X-Payments back end, go to the 'Online Stores' page (**Settings -> Online stores**).
  2. Click **Add new**.
  3. On the page that opens, enter your Magento store name, store title and order prefix.
  4. Specify the templates that you would like to use for the payment pages in your Magento 2 store (a template for laptop and desktop users, a template for mobile users and a template for users who have 3-D Secure protection enabled).
  5. Specify the payment configuration you would like to use for this store (Select the payment configuration you have configured at the previous step).
  6. Click **Save** to save the changes.
  7. Make sure the online store is enabled.

You have completed configuring the connection in X-Payments.

Before you proceed to configuring the connection in your Magento 2 Administrator panel, please pay attention to the Connection section on the right-hand side of the page with the details of your Magento 2 store in X-Payments. Here you should be able to see the so-called configuration bundle for your Magento 2 store. The configuration bundle provides a quick method to deploy X-Payments connection settings in your Magento 2 store. You will need this bundle when you will be configuring the connection in your Magento 2 Administrator panel. For now, simply click the Copy button to copy the bundle to clipboard so you have it at the ready when it is time to paste it on the end of your Magento 2 store.

Now you can [configure the connection to X-Payments in the Magento 2 store Administrator panel](#).

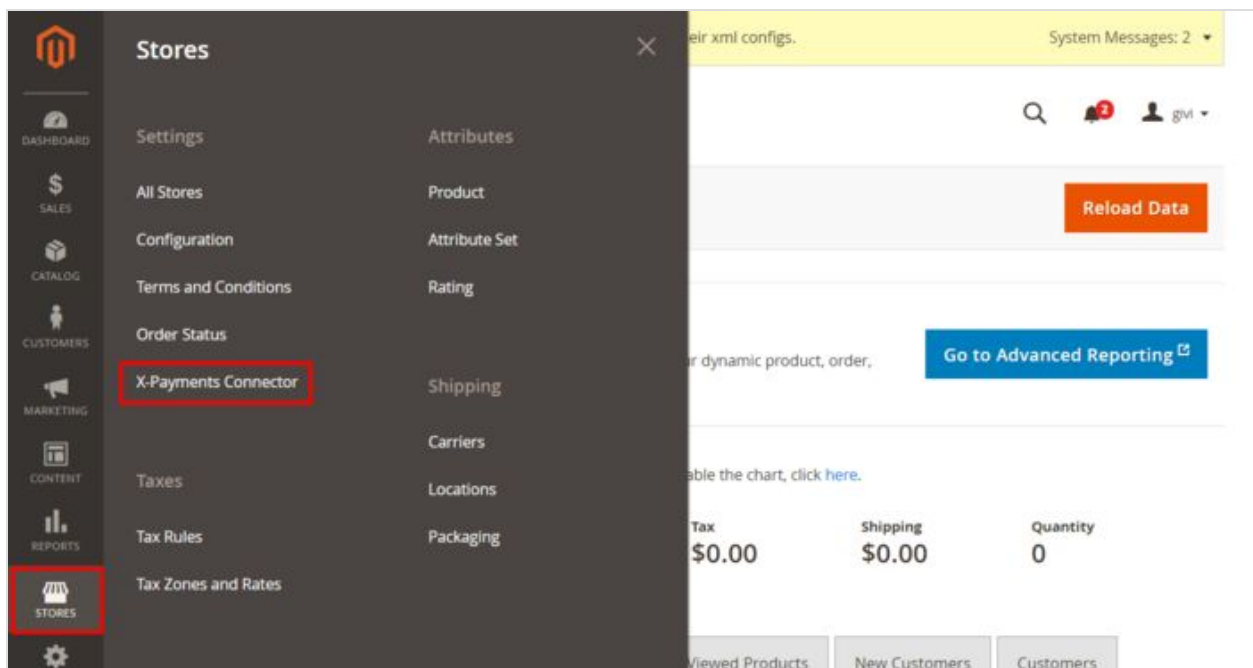
## Configure the connection to X-Payments in the Magento 2 store Administrator panel

After configuring the connection to your Magento 2 store in X-Payments, log in to your Magento 2 store Administrator panel and complete setting up the connection on the Magento 2 store end.

The following procedure assumes that your Magento store has the X-Payments connector extension installed.

Complete the following steps:

1. Log in to the Administrator panel of your Magento 2 store.
2. Go to **Stores** -> **X-Payments Connector**:



3. The Welcome page showing how to connect X-Payments with Magento 2 in three easy steps opens:

The screenshot shows the 'X-Payments Connector' dashboard. On the left is a vertical sidebar with icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, and System. The main content area has a 'Welcome' section with a 'Connection settings' link. Below this is a 'Need help with X-Payments? Contact us!' link. A large box contains the X-Payments logo and a message about PCI security. Below this is a three-step process: 1. Open your X-Payments dashboard or (with a 'Start FREE Trial' button), 2. Configure your gateway in X-Payments (with a 'See how' link), and 3. Connect X-Payments with Magento (with a 'See how' link). The third step is highlighted with a red box in the subsequent image.

X-Payments Connector

Dashboard

Welcome

Connection settings

Need help with X-Payments?  
[Contact us!](#)

Give your customers – and yourself – peace of mind with this payment processing module that guarantees compliance with PCI security mandates, significantly reduces the risk of data breaches and ensures you won't be hit with a fine of up to \$500,000 for non-compliance. Safely and conveniently store customers credit card information to use for new orders, reorders or recurring payments.

Connect to X-Payments. Complete 3 easy steps.

- 1 Open your X-Payments dashboard or  
[Start FREE Trial](#)
- 2 Configure your gateway in X-Payments  
[See how](#)
- 3 Connect X-Payments with Magento  
[See how](#)

4. Click on the link "Connect X-Payments with Magento":

This screenshot is identical to the previous one, but the third step, 'Connect X-Payments with Magento', is highlighted with a red rectangular box around the text and the 'See how' link.

X-Payments Connector

Dashboard

Welcome

Connection settings

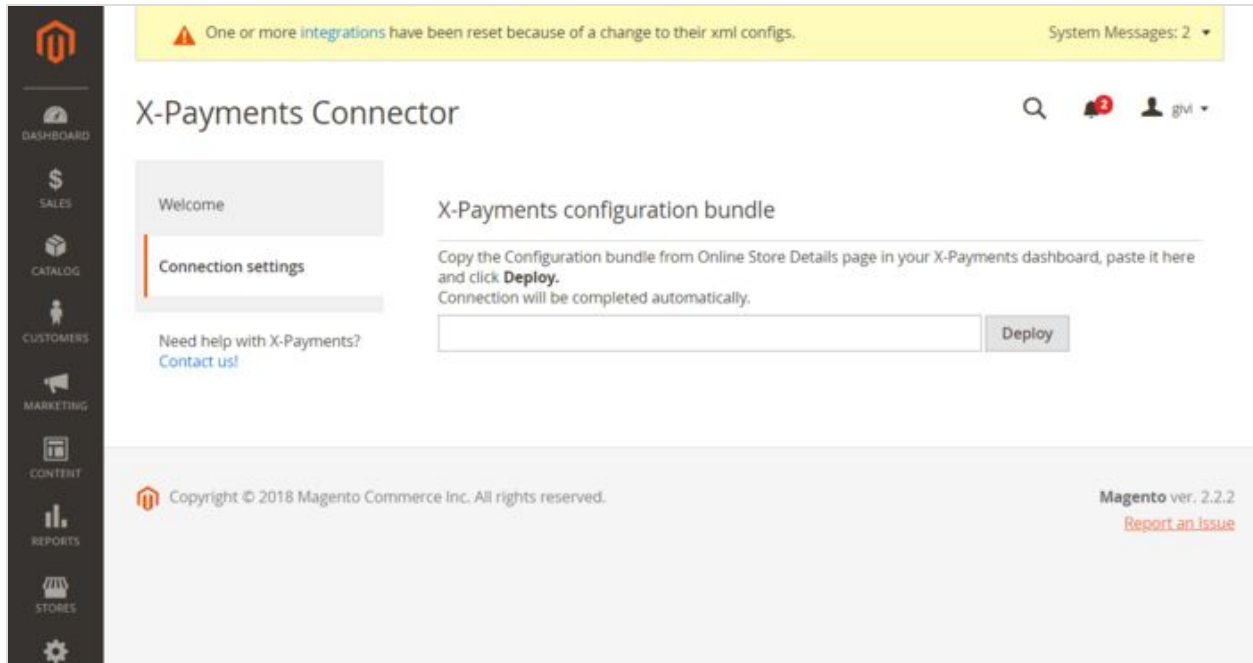
Need help with X-Payments?  
[Contact us!](#)

Give your customers – and yourself – peace of mind with this payment processing module that guarantees compliance with PCI security mandates, significantly reduces the risk of data breaches and ensures you won't be hit with a fine of up to \$500,000 for non-compliance. Safely and conveniently store customers credit card information to use for new orders, reorders or recurring payments.

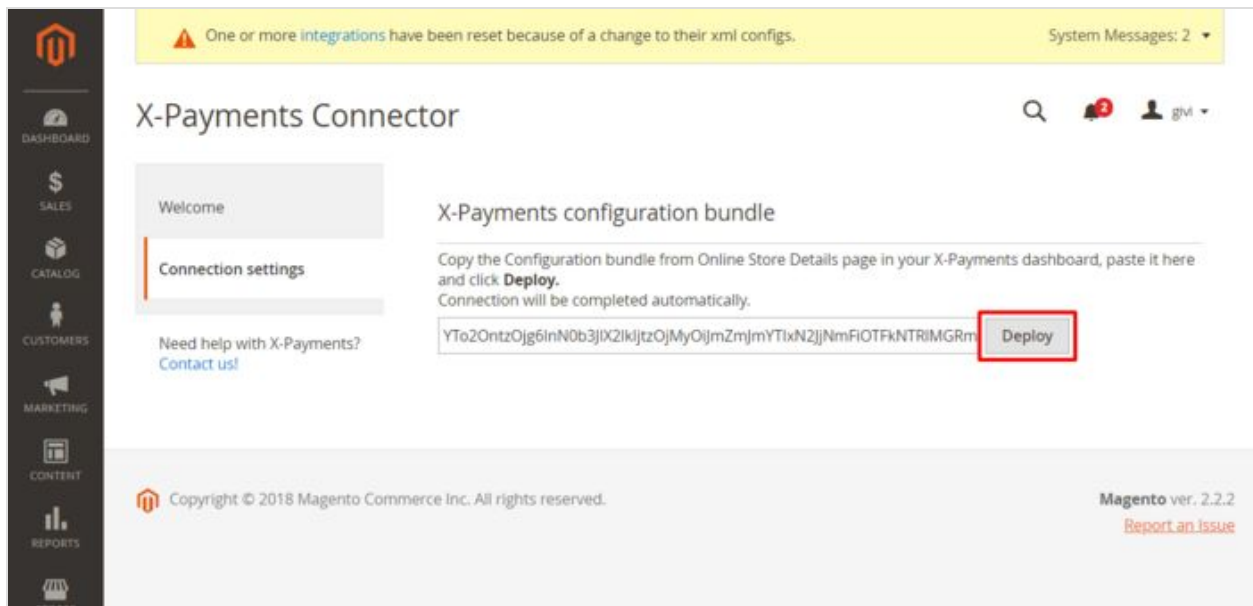
Connect to X-Payments. Complete 3 easy steps.

- 1 Open your X-Payments dashboard or  
[Start FREE Trial](#)
- 2 Configure your gateway in X-Payments  
[See how](#)
- 3 Connect X-Payments with Magento  
[See how](#)

5. This opens the Connection settings section:



6. In the details of your Magento 2 online store in the X-Payments back end, copy your X-Payments configuration bundle and paste it into the respective box in your Magento 2 Administrator panel.
7. Click **Deploy**.



8. In a couple of seconds, the configuration bundle will be deployed, and a success message will be displayed at the top of the page:

9. Check the list of payment methods that have been imported from X-Payments. On the screenshot below you can see that a single payment method has been imported - "Authorize.Net":

10. If you need to import more payment methods, you will have to add them in X-Payments first and use the **Re-import payment methods** button in the Magento 2 store to import them.

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

## X-Payments Connector

✓ Connection with X-Payments is OK. API version: 1.7

Connection settings

Payment methods

Need help with X-Payments? [Contact us!](#)

Payment configurations

Payment method	Currency
<input type="radio"/> Authorize.Net	USD
<input checked="" type="radio"/> Disable X-Payments payment method	

[Update](#) [Re-import payment methods](#) [Add new payment method](#)

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11. To quickly access the X-Payments page where you can add more payment methods, use the "Add new payment method" link.

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

## X-Payments Connector

✓ Connection with X-Payments is OK. API version: 1.7

Connection settings

Payment methods

Need help with X-Payments? [Contact us!](#)

Payment configurations

Payment method	Currency
<input type="radio"/> Authorize.Net	USD
<input checked="" type="radio"/> Disable X-Payments payment method	

[Update](#) [Re-import payment methods](#) [Add new payment method](#)

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12. At the time of the writing of this article, multiple payment methods can be imported from X-Payments into Magento 2, but only one of them can be enabled and used to accept payments.
13. If you look at the details of the payment method "Authorize.Net" we have imported from X-Payments, you will see that it is set to work using the currency "USD".



14. The currency is set in X-Payments, and should you want to change the currency used, you will want to do that via the payment configuration settings on the X-Payments end, after which you will have to re-import the payment method settings into your Magento 2 store with the **Re-import payment methods** button.
15. After the deployment of the configuration bundle, none of the payment methods imported from X-Payments are active for your Magento 2 store. (Note the unchecked radio button in the first column on the left opposite the payment method name "Authorize.Net". Also note the option "Disable X-Payments payment method" which is currently enabled):

16. You still need to activate the payment method you wish to use in your Magento 2 store. To activate a payment method, select the radio button in the first column on the left opposite the method name and click **Update**.



One or more integrations have been reset because of a change to their xml configs. System Messages: 2

## X-Payments Connector

Connection with X-Payments is OK. API version: 1.7

Connection settings

Payment methods

Need help with X-Payments? [Contact us!](#)

Payment configurations

Payment method	Currency
<input checked="" type="radio"/> Authorize.Net	USD
<input type="radio"/> Disable X-Payments payment method	

**Update** Re-import payment methods [Add new payment method](#)

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17. The selected method will be activated, and you will see a success message at the top of the page.

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

## X-Payments Connector

Payment methods updated successfully

Connection with X-Payments is OK. API version: 1.7

Connection settings

Payment methods

Need help with X-Payments? [Contact us!](#)

Payment configurations

Payment method	Currency
<input checked="" type="radio"/> Authorize.Net	USD
<input type="radio"/> Disable X-Payments payment method	

Update Re-import payment methods [Add new payment method](#)

18. Go back to the **Connection settings** section of the Magento 2 Administrator panel to complete the connection.

**Connection settings**

Payment methods

Need help with X-Payments?  
[Contact us!](#)

### X-Payments configuration bundle

Copy the Configuration bundle from Online Store Details page in your X-Payments dashboard, paste it here and click **Deploy**.  
Connection will be completed automatically.

### Settings

X-Payments URL

IP addresses for X-Payments callbacks

Payment method title

Payment action

19. Here you will need to adjust a few more settings.

You should see that some of the settings on this page have already have been adjusted automatically as a result of the deployment of the X-Payments configuration bundle (like the **X-Payments URL** or the **IP addresses for X-Payments callbacks**). The rest of the settings should be checked and adjusted manually.

The list of settings available on the **Connection settings** page is as follows:

- **X-Payments URL:** URL where X-Payments is installed. This info is received automatically via the X-Payments configuration bundle.
- **IP addresses for X-Payments callbacks:** IP addresses from which X-Payments callbacks will originate.
- **Comment:** X-Payments will send callback requests to your store from specific IP addresses. To ensure that your store accepts callback requests only from these IP addresses, the allowed IP addresses need to be specified in this field as a comma-separated list. For more info, see [Callback from X-Payments to the store](#).
- **Payment method title:** This field can be used to set the name for the payment method - as it should be seen by your Magento 2 store users. The name entered into this field will replace the name imported from X-Payments.
- **Action (Authorize or Authorize and capture):** This setting determines how the buyer's credit card is charged when they pay you via X-Payments:
- If this is set to *Authorize*, a two-step process is used in which the authorization of payment is separated from the capture of the authorized payment. At the time of the initial transaction, you perform only an authorization on the buyer's card without actually capturing the funds. This corresponds to the payment status "Authorized" in X-Payments. Later you need to take additional steps to capture the funds or void the authorization.
- If this is set to *Authorize and capture*, an actual charge is made on the buyer's card as soon as the buyer's payment information is processed by the payment gateway -

without any further interaction on your part. In X-Payments the status of such payments appears as "Charged".

- Some payment gateways do not support two-step payments with separate authorization and capture, so if you wish to choose the "Authorize" option, make sure your payment gateway supports this feature.
- Please be aware that the "Action" setting in your Magento 2 store overrides the "Initial transaction" setting in the respective payment configuration in X-Payments (Setting the "Action" to *Authorize* in Magento 2 allows you to have a two-step payment process with separate authorization and capture - even if the payment configuration in X-Payments is configured to use the "Auth and capture" mode for the initial transaction.)

2. After making changes to the settings in the **Connection settings** section, be sure to click **Update** to save them.

That's it. You have connected your Magento 2 store to X-Payments.

## Magento 2 checkout routine when using X-Payments

Once the X-Payments enabled payment method has been enabled in the Administrator panel of your Magento 2 store, this method becomes available to the buyers:

The screenshot shows the Magento 2 checkout process at the 'Review & Payments' stage. The 'Payment Method' section lists two options: 'Check / Money order' and 'Payment method (xpc1)'. The 'Payment method (xpc1)' option is selected and circled in red. To the right, an 'Order Summary' box displays the cart subtotal as \$72.00, shipping as \$10.00, and a total of \$82.00. The top navigation bar includes the LUMA logo, a search bar, and a shopping cart icon with a '3' indicating items in the cart.

Order Summary	
Cart Subtotal	\$72.00
Shipping Best Way - Table Rate	\$10.00
<b>Order Total</b>	<b>\$82.00</b>
1 Item in Cart	

When a buyer chooses to pay using the X-Payments enabled payment method, they get to enter their payment info into a form like the following:

Payment method (xpc1)

☒ My billing and shipping address are the same

Test User  
120 Test address  
Beverly Hills, California 90210  
United States  
7328937447

CARD NUMBER

Card number

EXPIRATION DATE

MM / YY

CSC

CSC ?

CARDHOLDER NAME

Test User

Place Order

Cart Subtotal\$48.00

Shipping\$10.00

Flat Rate - Fixed

Order Total\$58.00

1 Item in Cart

Ship To:

Test User  
120 Test address  
Beverly Hills, California 90210  
United States  
7328937447

Shipping Method:

Flat Rate - Fixed

After the completion of the payment, they get an order confirmation as usual and can review the details of their order in their account.

LUMA

Search entire store here...

What's New Women Men Gear Training Sale

Thank you for your purchase!

Print receipt

Your order number is: 000000246.

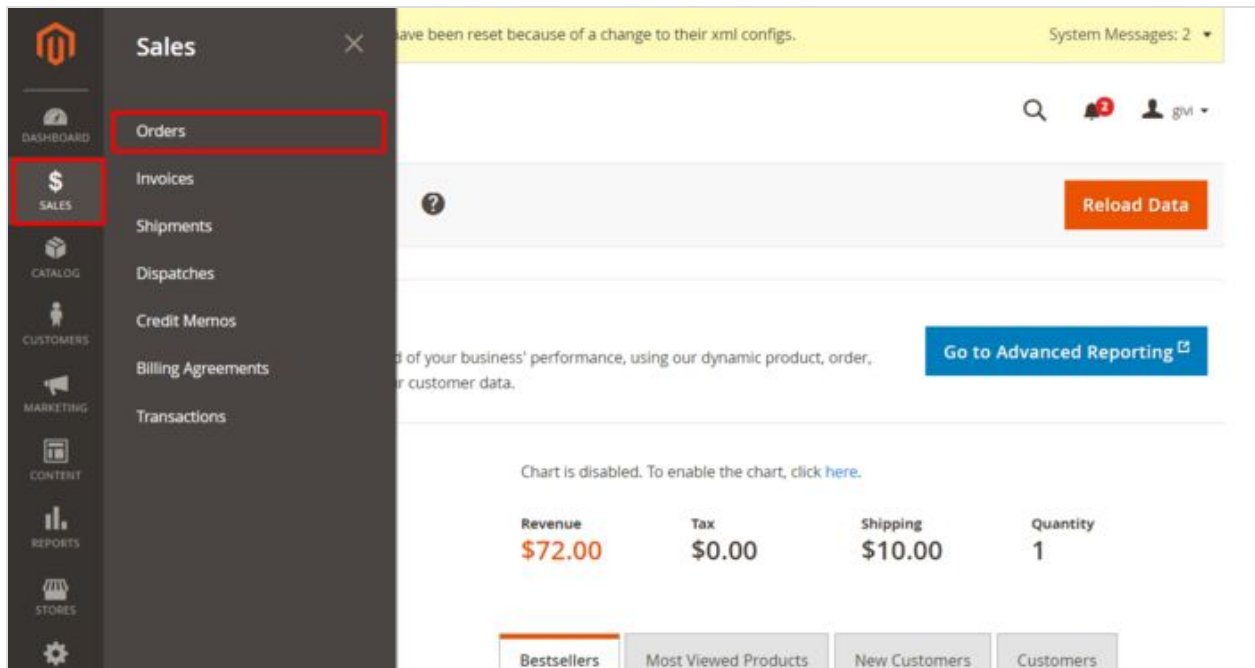
We'll email you an order confirmation with details and tracking info.

Continue Shopping

# Reviewing payment information for X-Payments orders when using X-Payments with Magento 2

You can easily find orders that were paid for via X-Payments and get all the payment related information you require:

1. In the Administrator panel of your Magento 2 store, go to the Orders section (**Sales->Orders**):



2. Make sure the set of active columns for your Orders table includes the column "Payment Method". If not, select **Columns** and put a check mark in the **Payment Method** checkbox.

The screenshot shows the 'Orders' management page. On the left is a sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, and System. The main header includes a search bar, filters, view options, and a 'Columns' dropdown menu which is open. In the 'Columns' menu, the 'Payment Method' checkbox is checked and highlighted with a red box. Other visible columns include ID, Purchase Point, Purchase Date, Grand Total (Purchased), Status, Billing Address, Shipping Address, Shipping Information, Customer Email, Customer Group, Subtotal, Shipping and Handling, Customer Name, Total Refunded, and Signifyd Guarantee Decision. The table below shows 5 records found.

ID	Purchase Point	Purchase Date
000000246	Main Website Main Website Store Default Store View	Feb 11, 2018 9:26:57 AM
000000245	Main Website	Feb 10, 2018 12:32:05 AM

- Your Orders table should now have a column with information regarding the payment method that was used for each order:

The screenshot shows the 'Orders' management page after the column has been added. The table now includes a 'Payment Method' column, which is highlighted with a red box. The table contains 5 records. The 'Payment Method' column shows 'Payment method (xpc1)' for the first two records and 'Payment method' for the third. The 'Action' column has a 'View' link for each record.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action	Signifyd Guarantee Decision
000000246	Main Website Main Website Store Default Store View	Feb 11, 2018 9:26:57 AM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	
000000245	Main Website Main Website Store Default Store View	Feb 10, 2018 12:32:05 AM	Test User	Test User	\$39.00	\$39.00	Processing	Payment method (xpc1)	<a href="#">View</a>	
000000070	Main Website	Feb 10, 2018 12:19:32 AM	john young	john young	\$54.00	\$54.00	Processing	Payment method	<a href="#">View</a>	

- You can tell that an order was paid for using X-Payments if the **Payment Method** column for this order shows the title of your X-Payments payment method. The X-Payments payment method title can be adjusted in your store's X-Payments Connection settings (**Stores->X-Payments Connector**).



5. Use the sorting and filtering features to locate the order for which you wish to review the payment information. Click anywhere on the table row of that order to view the order details. There you will find the order payment information.

For example, let's have a look at the details of Order 000000246. To review the detailed information pertaining to this order, we click on the line of this order in the Orders table:

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action	Signifyd Guarantee Decision
<input type="checkbox"/>	000000246	Main Website Main Website Store Default Store View	Feb 11, 2018 9:26:57 AM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	
<input type="checkbox"/>	000000245	Main Website Main	Feb 10, 2018 12:32:05 AM	Test User	Test User	\$39.00	\$39.00	Processing	Payment method (xpc1)	<a href="#">View</a>	

The Information page for Order 000000246 opens:

## #000000246

[Back](#) [Send Email](#) [Credit Memo](#) [Hold](#) [Ship](#) [Reorder](#)

**ORDER VIEW**

- Information**
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

### Order & Account Information

**Order # 000000246 (The order confirmation email was sent)**

Order Date

Feb 11, 2018, 9:26:57 AM

Order Status

Processing

Purchased From

Main Website  
Main Website Store  
Default Store View

Placed from IP

128.73.91.192

**Account Information** [Edit Customer](#)

Customer Name

Test User

Email

Customer Group

General

### Address Information

**Billing Address** [Edit](#)

Test User  
120 Test address  
Beverly Hills, California, 90210  
United States

**Shipping Address** [Edit](#)

Test User  
120 Test address  
Beverly Hills, California, 90210  
United States

We see that the Order Status is currently "Processing". If we scroll down the page to the **Payment & Shipping Method** section, we'll find out that the order was paid for using the payment method "Payment method (xpc1)", which is the title of the X-Payments-enabled payment method in our store, and that the payment currency was USD.

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

FIND PARTNERS

#000000246

← Back

Send Email

Credit Memo

Hold

Ship

Reorder

Payment & Shipping Method

Payment Information

Payment method (xpc1)

The order was placed using USD.

Shipping & Handling Information


Best Way - Table Rate \$10.00

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount
Gwyn Endurance Tee	Invoiced	\$24.00	\$24.00	Ordered 3 Invoiced 3	\$72.00	\$0.00	0%	\$0.00
SKU: W501-M-Yellow Size: M								

If we scroll further down the page, we will see more detailed information regarding all the payment related operations for the order:

#000000246
← Back   Send Email   Credit Memo   Hold   Ship   Reorder



☐ Notify Customer by Email

☐ Visible on Storefront

Submit Comment

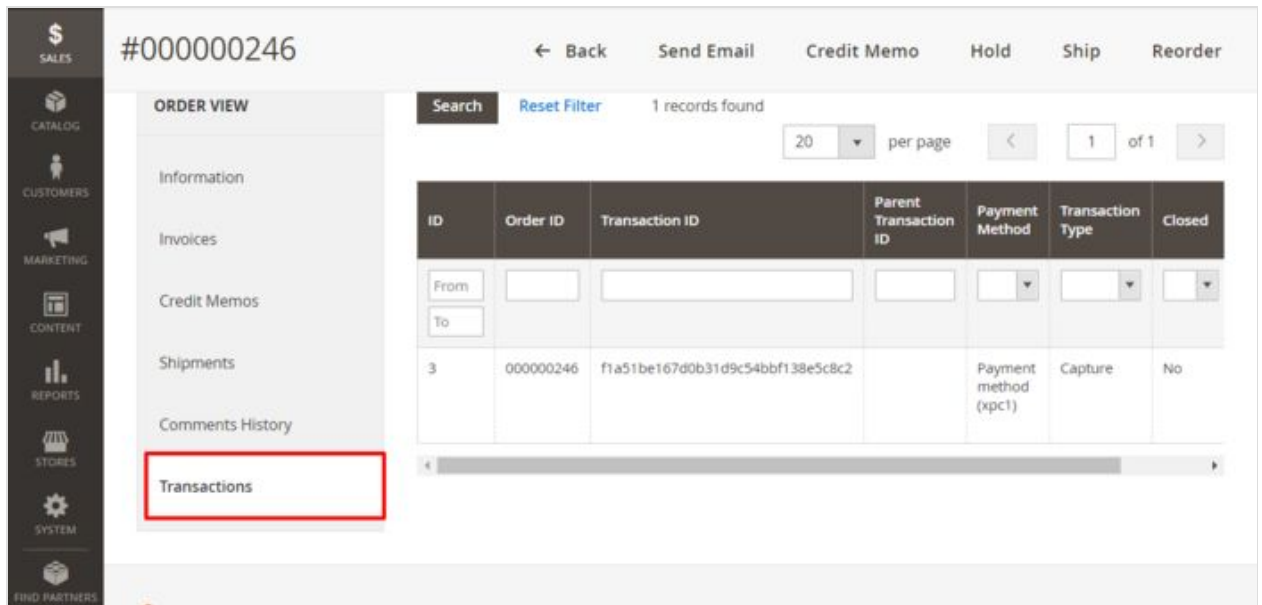
<b>Grand Total</b>	<b>\$82.00</b>
<b>Total Paid</b>	<b>\$82.00</b>
<b>Total Refunded</b>	<b>\$0.00</b>
<b>Total Due</b>	<b>\$0.00</b>

Feb 11, 2018 9:26:57 AM | Processing | Customer **Not Notified**

→ Captured amount of \$82.00 online. Transaction ID: "f1a51be167d0b31d9c54bbf138e5c8c2"

From the information provided here, we can infer that the payment was made in the "Authorize and capture" mode, which resulted in that the order amount (\$82.00) was captured online at the time of order placement. Knowing the transaction ID (in our case, "f1a51be167d0b31d9c54bbf138e5c8c2") allows us to identify the respective transaction in the **Transactions** section of the order details in the Magento 2 store Administrator panel and in X-Payments.

For a detailed view of the order transactions, we recommend using the **Transactions** section:



The screenshot displays the Magento 2 Admin interface for order #000000246. The left sidebar contains a menu with various sections, and the 'Transactions' link is highlighted with a red box. The main content area shows the 'ORDER VIEW' section with a table of transactions. The table has columns for ID, Order ID, Transaction ID, Parent Transaction ID, Payment Method, Transaction Type, and Closed. A single transaction is listed with ID 3, Order ID 000000246, and Transaction ID f1a51be167d0b31d9c54bbf138e5c8c2. The Payment Method is 'Payment method (xpc1)' and the Transaction Type is 'Capture'.

ID	Order ID	Transaction ID	Parent Transaction ID	Payment Method	Transaction Type	Closed
3	000000246	f1a51be167d0b31d9c54bbf138e5c8c2		Payment method (xpc1)	Capture	No

## Capturing payments when using X-Payments with Magento 2

Depending on the payment method settings, an order payment via X-Payments may be carried out in either the "Authorize" or the "Authorize and capture" mode.

In a workflow where an order payment is performed in the "Authorize" mode ("Initial transaction = Auth" in X-Payments and/or "Action = Authorize and capture" in Magento), it happens as a two-step process: at the time of order creation, you obtain an authorization for the order grand total amount; later you do a manual capture of the funds to initiate a transfer of the authorized amount from the buyer's account to your account. Note that you are guaranteed these funds only for a limited time (Typically, you have to capture a previously authorized amount within 30 days, but the time may vary by company, so you should check with your payment gateway).

In the "Authorize and capture" mode ("Initial transaction = Auth and capture" in the payment configuration settings in X-Payments *and* "Action = Authorize and capture" in the X-Payments connector payment method

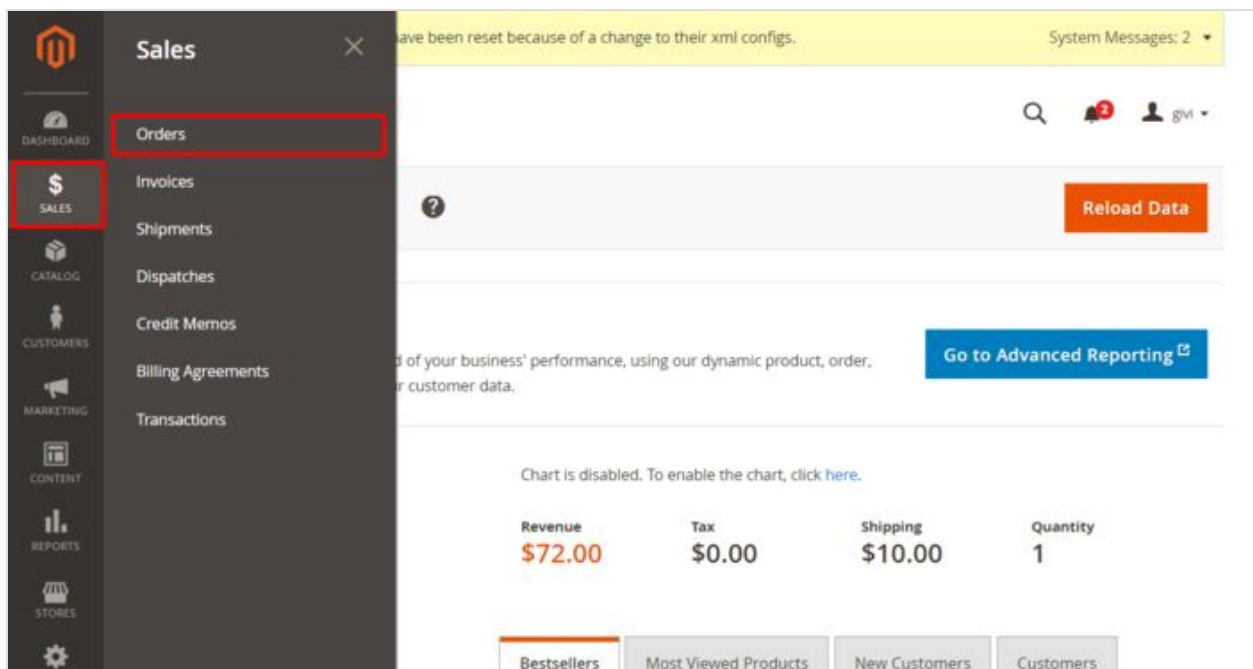
settings in Magento), an authorization and a capture are both performed at once at the time of order creation, so you do not need to worry about manually capturing the funds.

Below we discuss how to capture the funds for which an authorization has been obtained as a result of a buyer making a payment in the "Authorize" mode.

The recommended method to capture a previously authorized amount is based on creating an invoice. If required, multiple invoices can be created for a single order, each containing as many of the purchased items as you specify.

To perform a capture:

1. In the Administrator panel, select **Sales > Orders**:



2. In the Orders table, locate the order for which you want to perform a capture and click to open the order details.

Orders

Create New Order

Search by keyword

Filters

Default View

Columns

Export

Actions

6 records found

20 per page

1 of 1

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action	Signifyd Guarantee Decision
<input type="checkbox"/>	000000247	Main Website Main Website Store Default Store View	Feb 12, 2018 4:02:13 PM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	
<input type="checkbox"/>	000000246	Main Website Main Website Store Default Store View	Feb 11, 2018 9:26:57 AM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	

3. Choose to create a new invoice by clicking the **Invoice** button:

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

#000000247

Back Cancel Send Email Void Hold **Invoice** Ship Reorder

**ORDER VIEW**

Information

Invoices

Credit Memos

Shipments

**Order & Account Information**

Order # 000000247 (The order confirmation email was sent)

Order Date Feb 12, 2018, 4:02:13 PM

Order Status Processing

Purchased From Main Website  
Main Website Store  
Default Store View

Placed from IP 128.69.29.130

**Account Information** [Edit Customer](#)

Customer Name Test User

Email

Customer Group General

4. This opens a new invoice page:

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

One or more integrations have been reset because of a change to their xml configs.
 System Messages: 2

New Invoice

← Back

Reset

Order & Account Information

Order # 000000247 (The order confirmation email was sent)

Order Date

Feb 12, 2018, 4:02:13 PM

Order Status

Processing

Purchased From

Main Website  
Main Website Store  
Default Store View

Placed from IP

128.69.29.130

Account Information [Edit Customer](#)

Customer Name

Test User

Email

Customer Group

General

5. Scroll down to the **Items to Invoice** section.

SALES

CATALOG

CUSTOMERS

MARKETING

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SYSTEM

FIND PARTNERS & EXTENSIONS

New Invoice

← Back

Reset

Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Gwyn Endurance Tee SKU: WS01-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 2	<input type="text" value="2"/>	\$48.00	\$0.00	\$0.00	\$48.00
Desiree Fitness Tee SKU: WS05-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 1	<input type="text" value="1"/>	\$24.00	\$0.00	\$0.00	\$24.00

Update Qty's

Order Total

6. This section provides a list of items you can invoice and their respective quantities. By default, the invoice will be created for the entire order. If you are going to invoice only some of the items and do a partial capture this time, update the quantities to invoice (specify the correct quantities in the **Qty to invoice** column and click the **Update Qty's** button).



**New Invoice** ← Back Reset

Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Gwyn Endurance Tee SKU: WS01-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 2	<input type="text" value="2"/>	\$48.00	\$0.00	\$0.00	\$48.00
Desiree Fitness Tee SKU: WS05-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 1	<input type="text" value="0"/>	\$24.00	\$0.00	\$0.00	\$24.00

Update Qty's

7. The invoice totals will be re-calculated.

**Important:** Before using partial capture, make sure your payment gateway supports this feature.

- Work through the invoicing process as usual: add a tracking number, create a packing slip, enter invoice comments as needed, specify whether a copy of the invoice needs to be emailed to the customer and whether your comments need to be appended to it.
- In the **Amount** field, select the payment action you require:

**New Invoice** ← Back Reset

Order Total

Invoice History

Invoice Comments

Comments comments comments +

Invoice Totals

Subtotal	\$48.00
Shipping & Handling	\$10.00
<b>Grand Total</b>	<b>\$58.00</b>

Amount

Capture Online ▼

☒ Append Comments

☒ Email Copy of Invoice

Submit Invoice

10.

- **Capture Online:** Upon invoice submission, the invoice amount will be captured (a request to capture the specified amount will be sent through X-Payments to the payment gateway). After the capture, you will have the ability to create a credit memo should you require to issue a refund.
- **Capture Offline:** Upon invoice submission, the system will not capture the payment (no request to capture the payment will be sent). This option should be selected if the capture of funds is performed directly through the gateway or through the X-Payments back end. Note that after using the "Capture Offline" option you will no longer have the option to capture this payment through your Magento store. You will have the ability to create a credit memo.
- **Not Capture:** Upon invoice submission, the system will not capture the payment (no request to capture the payment will be sent). This option assumes that you will capture the payment at a later date. The completed invoice (you will be able to access it through **Order View > Invoices**) will have a **Capture** button allowing you to complete the task.
- Before the payment is captured, you will be able to cancel the invoice. After capturing you will be able to create a credit memo.
- **Important:** Do not select "Not Capture" unless you are certain that you are going to capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured using the **Capture** button.

11. Click the **Submit Invoice** button to process the invoice.

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SYSTEM

THIRD PARTIES

New Invoice

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Order Total

Invoice History

Invoice Comments

Invoice Totals

Subtotal	\$48.00
Shipping & Handling	\$10.00
<b>Grand Total</b>	<b>\$58.00</b>

Amount

Capture Online ▼

☐ Append Comments

☐ Email Copy of Invoice

Submit Invoice

The invoice will be created. The selected payment action (Capture Online, Capture Offline or Not Capture) will be applied.

#000000247

← Back Reorder Ship Invoice Hold Credit Memo Send Email Cancel

✓ The invoice has been created.

**ORDER VIEW**

Information  
Invoices  
Credit Memos  
Shipments

**Order & Account Information**

Order # 000000247 (The order confirmation email was sent)

Order Date Feb 12, 2018, 4:02:13 PM

Order Status Processing

Purchased From Main Website  
Main Website Store  
Default Store View

**Account Information** [Edit Customer](#)

Customer Name Test User

Email [REDACTED]

Customer Group General

Now if you go back to the order details and click on the **Invoices** tab under the **Order View** menu, you should be able to see the new invoice added to the list of invoices pertaining to the order:

⚠ One or more integrations have been reset because of a change to their xml configs. System Messages: 2

#000000247

← Back Cancel Send Email Credit Memo Hold Invoice Ship Reorder

**ORDER VIEW**

Information  
**Invoices**  
Credit Memos  
Shipments  
Comments History

Search by keyword

Filters

Actions 1 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000005	Feb 12, 2018 4:28:07 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Paid	\$58.00	<a href="#">View</a>

An invoice created with the "Capture Online" option or captured after it has been created with the "Not Capture" option will have the status *Paid*. The respective capture transaction will appear in the X-Payments back end with the status *Charged*.

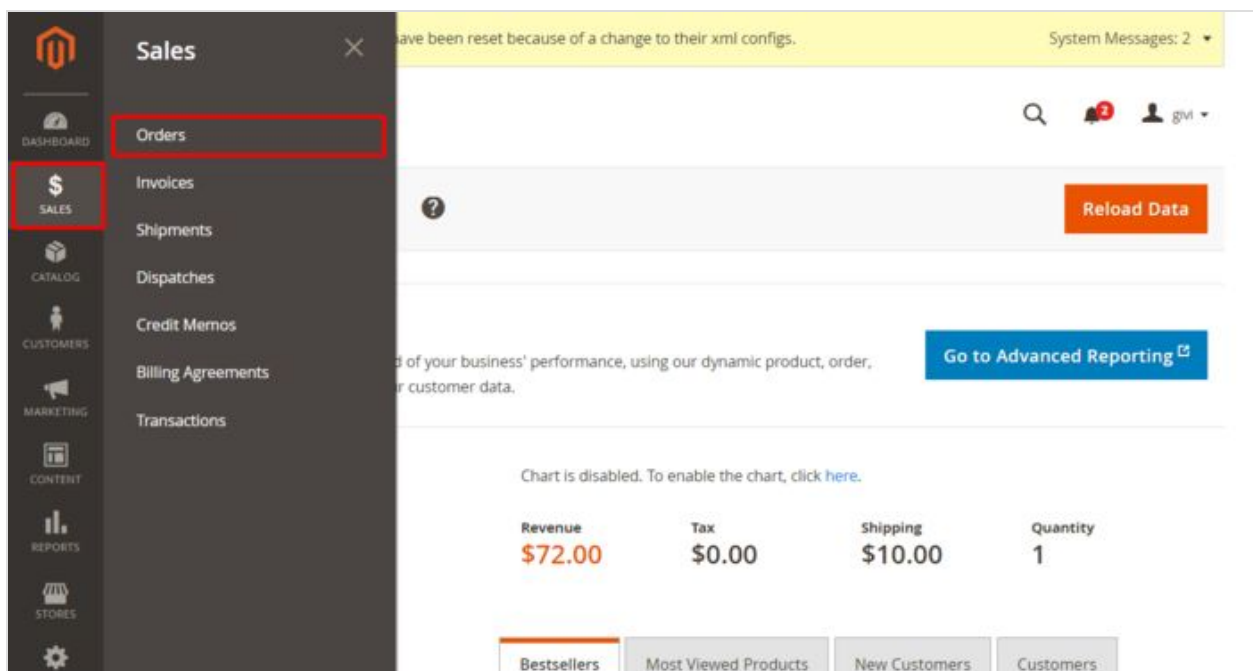
An invoice created with the "Capture Offline" or "Not Capture" option will have the status *Pending*; no transaction will be reflected in X-Payments.

## Issuing refunds when using X-Payments with Magento 2

After an order has been paid and invoiced, the entire order, or a portion of it, can be refunded. The basic method to do a refund in Magento is by issuing a credit memo.

To issue a refund:

1. In the Administrator panel, select **Sales > Orders**:



2. In the Orders list, locate the order for which you want to issue a refund and click to open the order details:

**Orders**

[Create New Order](#)

Search by keyword

Filters Default View Columns Export

Actions 6 records found 20 per page 1 of 1

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action	Signifyd Guarantee Decision
<input type="checkbox"/>	000000247	Main Website Main Website Store Default Store View	Feb 12, 2018 4:02:13 PM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	
<input type="checkbox"/>	000000246	Main Website Main Website Store Default Store View	Feb 11, 2018 9:26:57 AM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	

- In the **Order View** menu on the left-hand side of the screen, select the **Invoices** tab. This opens a list of invoices pertaining to the order:

**#000000247**

Back Send Email Credit Memo Hold Ship Reorder

**ORDER VIEW**

Information

**Invoices**

Credit Memos

Shipments

Comments History

Transactions

Search by keyword

Filters Default View Columns Export

Actions 2 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000005	Feb 12, 2018 4:28:07 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Paid	\$58.00	<a href="#">View</a>
<input type="checkbox"/>	000000006	Feb 12, 2018 4:35:12 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Pending	\$24.00	<a href="#">View</a>

- Locate the invoice for the item(s) you need to refund and click to open it.

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

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#000000247

Back

Send Email

Credit Memo

Hold

Ship

Reorder

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

Search by keyword

Filters

Default View

Columns

Export

Actions

2 records found

20 per page

1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000005	Feb 12, 2018 4:28:07 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Paid	\$58.00	<a href="#">View</a>
<input type="checkbox"/>	000000006	Feb 12, 2018 4:35:12 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Pending	\$24.00	<a href="#">View</a>

- In the upper right of the Invoice page, click the **Credit Memo** button to start the refund process by generating a credit memo.

One or more integrations have been reset because of a change to their xml configs.

System Messages: 2

#000000005

Back

Send Email

Credit Memo

Print

Order & Account Information

Order # 000000247 (The order confirmation email was sent)

Order Date

Feb 12, 2018, 4:02:13 PM

Order Status

Processing

Purchased From

Main Website  
Main Website Store  
Default Store View

Placed from IP

128.69.29.130

Account Information [Edit Customer](#)

Customer Name

Test User

Email

Customer Group

General

- The New Memo page opens:



DASHBOARD

SALES

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CUSTOMERS

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STORES

One or more integrations have been reset because of a change to their xml configs.
 System Messages: 2

New Memo for #000000005

← Back

Reset

Order & Account Information

Order # 000000247 (The order confirmation email was sent)

Order Date

Feb 12, 2018, 4:02:13 PM

Order Status

Processing

Purchased From

Main Website  
Main Website Store  
Default Store View

Placed from IP

128.69.29.130

Account Information [Edit Customer](#)

Customer Name

Test User

Email

Customer Group

General

7. Scroll down to the "Items to Refund" section.

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

One or more integrations have been reset because of a change to their xml configs.
 System Messages: 2

New Memo for #000000005

← Back

Reset

Items to Refund

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Gwyn Endurance Tee SKU: WS01-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 2 Invoiced 2	<input type="checkbox"/>	2	\$48.00	\$0.00	\$0.00	\$48.00

Update Qty's

Order Total

Credit Memo Comments

Refund Totals

8. This section provides a list of items pertaining to the invoice and their respective quantities. By default, a refund will be issued for the entire invoice amount. If you are going to refund only some of the items and do a partial refund this time, update the quantities to refund (specify the correct quantities in the **Qty to Refund** column and click the **Update Qty's** button); the total amount to be credited will be re-calculated. Select the **Return to Stock** checkbox for the items that will be returned to inventory (Do not select the checkbox if the items will not be returned). If you want to refund shipping, issue an adjustment refund or add an adjustment fee, specify the respective amounts.

**Important:** Before doing a partial refund, make sure your payment gateway supports this feature.

9. Work through the process of creating a credit memo as usual: enter credit memo comments as needed, specify whether a notification of the credit memo needs to be emailed to the customer and whether your comments need to be appended to the notification.
10. Click **Refund** or **Refund Offline** to process the refund (Select the button based on the action you require).

New Memo for #000000005

← Back Reset

Order Total

Credit Memo Comments

Comment Text

Refund Totals

Subtotal	\$48.00
Refund Shipping	10
Adjustment Refund	0
Adjustment Fee	0
<b>Grand Total</b>	<b>\$58.00</b>

☐ Append Comments

☐ Email Copy of Credit Memo

Refund Offline Refund

11. If you select **Refund**, a refund request will be submitted to the payment gateway via X-Payments, and a refund will be given at the same time that the credit memo is issued. If you select **Refund Offline**, no refund request will be sent (This option assumes that you will handle the refund directly through the gateway or through the X-Payments back end).

Once you have completed the above steps, the credit memo should be created.

#000000247

← Back Send Email Hold Ship Reorder

✓ You created the credit memo.

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Order & Account Information

Order # 000000247 (The order confirmation email was sent)

Order Date Feb 12, 2018, 4:02:13 PM

Order Status Processing

Purchased From Main Website  
Main Website Store  
Default Store View

Account Information [Edit Customer](#)

Customer Name Test User

Email

Customer Group General

Now if you go back to the order details and select the **Credit Memos** tab under the **Order View** menu, you should be able to see the new credit memo added to the list of credit memos pertaining to the order:

The screenshot shows the Magento 2 Order View interface for order #000000247. The left sidebar contains navigation links: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, and SYSTEM. The main content area is titled 'ORDER VIEW' and includes a search bar, a 'Filters' button, and a table of credit memos. The table has columns for Credit Memo, Created, Order, Order Date, Bill-to Name, Status, Refunded, and Action. A single record is shown with a status of 'Refunded' and a refunded amount of '\$58.00'.

Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refunded	Action
000000002	Feb 12, 2018 5:20:47 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Refunded	\$58.00	<a href="#">View</a>

The status will be shown as *Refunded*.

If you have chosen to complete the refund online, the refund transaction will appear in X-Payments with the same status, *Refunded*.

If you have chosen the "Refund Offline" option, the transaction will not be reflected in X-Payments.

## Canceling payments when using X-Payments with Magento 2

In the "Authorize" workflow - as opposed to the "Authorize and capture" workflow - it is possible to cancel (void) a payment before it has been captured. For example, if you have a payment for which an invoice was created with the "Not Capture" payment option, you can cancel it via the invoice page.

To cancel a payment:

1. In the Admin panel, select **Sales > Orders**:

System Messages: 2

Reload Data

Go to Advanced Reporting

Chart is disabled. To enable the chart, click [here](#).

Revenue	Tax	Shipping	Quantity
\$72.00	\$0.00	\$10.00	1

Bestsellers Most Viewed Products New Customers Customers

- In the Orders list, locate the order for which you want to cancel a payment and click to open the order details.

Create New Order

Search by keyword

Filters Default View Columns Export

Actions 7 records found 20 per page 1 of 1

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action	Signifyd Guarantee Decision
000000248	Main Website Main Website Store Default Store View	Feb 12, 2018 5:43:36 PM	Test User	Test User	\$66.00	\$66.00	Processing	Payment method (xpc1)	<a href="#">View</a>	
000000247	Main Website Main Website Store	Feb 12, 2018 4:02:13 PM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	<a href="#">View</a>	

- In the **Order View** menu on the left-hand side of the screen, select the **Invoices** tab. This opens a list of invoices pertaining to the order. Locate the invoice you need to cancel and click to open it.

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

#000000248

← Back Send Email Void Hold Ship Reorder

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Search by keyword

Filters

Default View Columns Export

Actions 1 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000007	Feb 12, 2018 5:44:45 PM	000000248	Feb 12, 2018 5:43:36 PM	Test User	Pending	\$66.00	<a href="#">View</a>

4. In the upper right of the Invoice page, click the **Cancel** button.

#000000007

← Back **Cancel** Send Email Capture Print

Order & Account Information

**Order # 000000248** (The order confirmation email was sent)

Order Date Feb 12, 2018, 5:43:36 PM

Order Status Processing

Purchased From Main Website  
Main Website Store  
Default Store View

Placed from IP 128.69.29.130

Account Information [Edit Customer](#)

Customer Name Test User

Email

Customer Group General

5. The authorization to capture the invoice amount will be voided. You should see a success message:

- DASHBOARD
- SALES
- CATALOG
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES

# #000000007

[← Back](#)
[Print](#)
[Send Email](#)

You canceled the invoice.

## Order & Account Information

**Order # 000000248** (The order confirmation email was sent)

Order Date

Feb 12, 2018, 5:43:36 PM

Order Status

Processing

Purchased From

Main Website  
Main Website Store  
Default Store View

Account Information [Edit Customer](#)

Customer Name

Test User

Email

[mailto:info@xpayments.com](#)

Customer Group

General

6. The invoice status will be updated to *Canceled*.

- DASHBOARD
- SALES
- CATALOG
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES

# #000000248

[← Back](#)
[Cancel](#)
[Send Email](#)
[Void](#)
[Hold](#)
[Invoice](#)
[Ship](#)
[Reorder](#)

**ORDER VIEW**

- Information
- Invoices**
- Credit Memos
- Shipments
- Comments History

Search by keyword

Actions

1 records found

20 per page

1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000007	Feb 12, 2018 5:44:45 PM	000000248	Feb 12, 2018 5:43:36 PM	Test User	Canceled	\$66.00	<a href="#">View</a>

In X-Payments, you should be able to find the respective Void transaction with the status *Voided*. The status of the payment in X-Payments should be updated to *Declined by merchant*.