

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

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

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

Using X-Payments with Magento 2: Administrator experience

- [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

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**):

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](#).

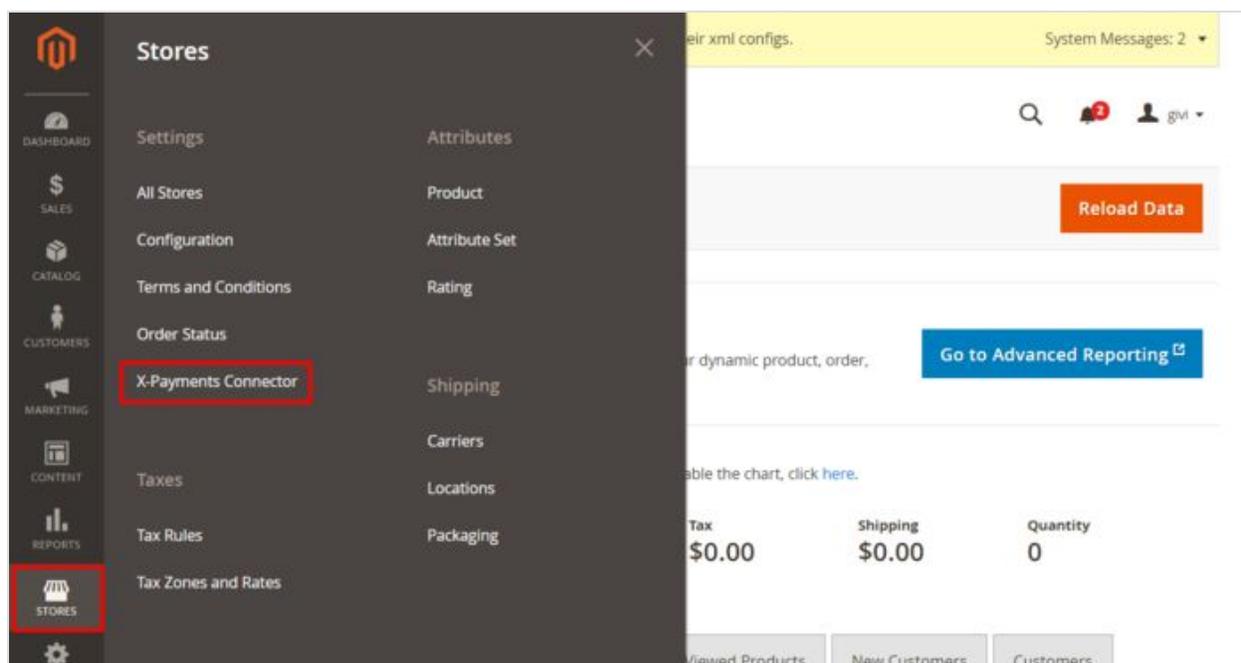
Configure the connection to X-Payments in the Magento 2 store Administrator panel

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**:



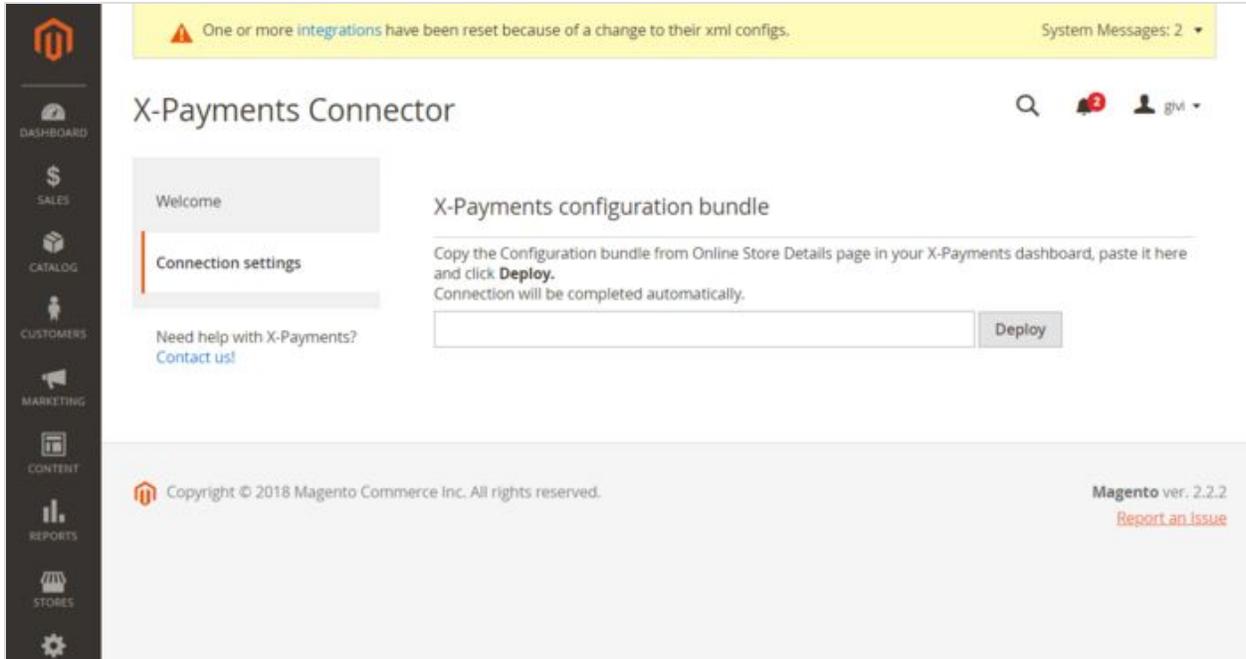
3. The Welcome page showing how to connect X-Payments with Magento 2 in three easy steps opens:

The screenshot shows the X-Payments Connector dashboard. On the left is a vertical navigation menu 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 promotional banner for X-Payments with a PCI DSS logo and a description of the payment processing module. A three-step process is outlined: 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).

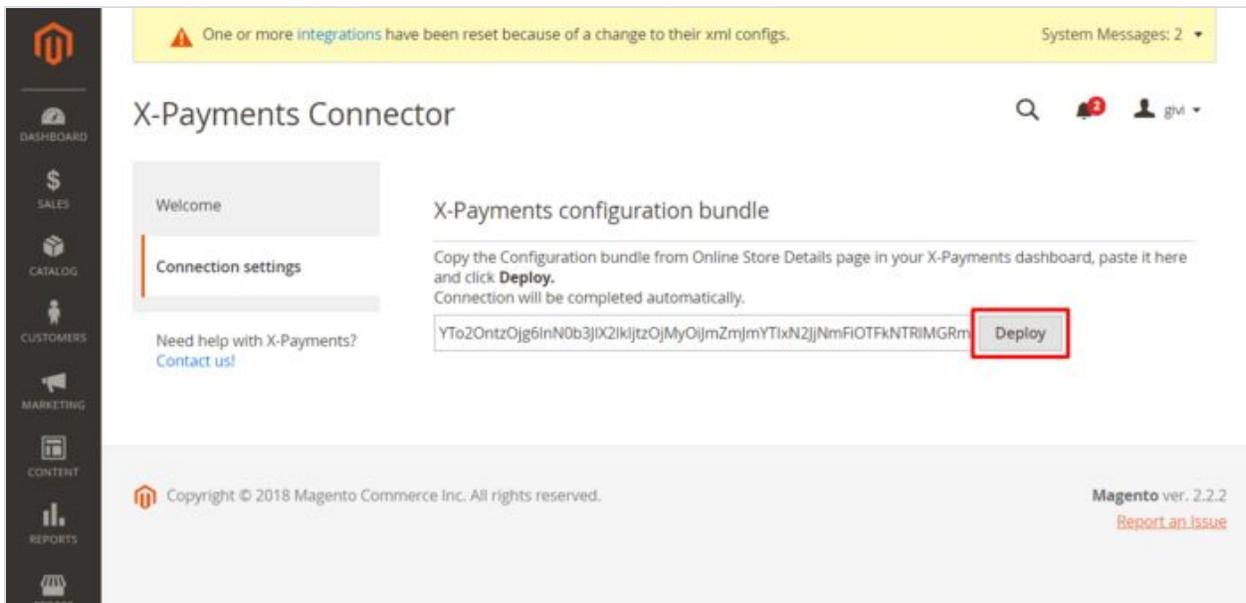
4. Click on the link "Connect X-Payments with Magento":

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

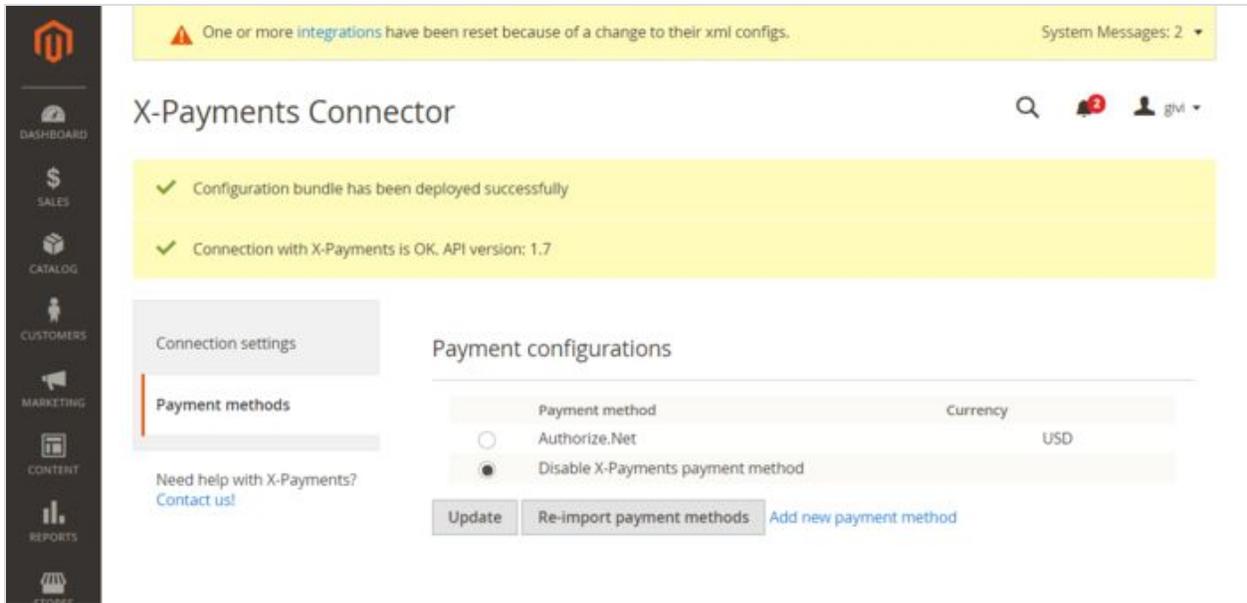
5. This opens the Connection settings section:



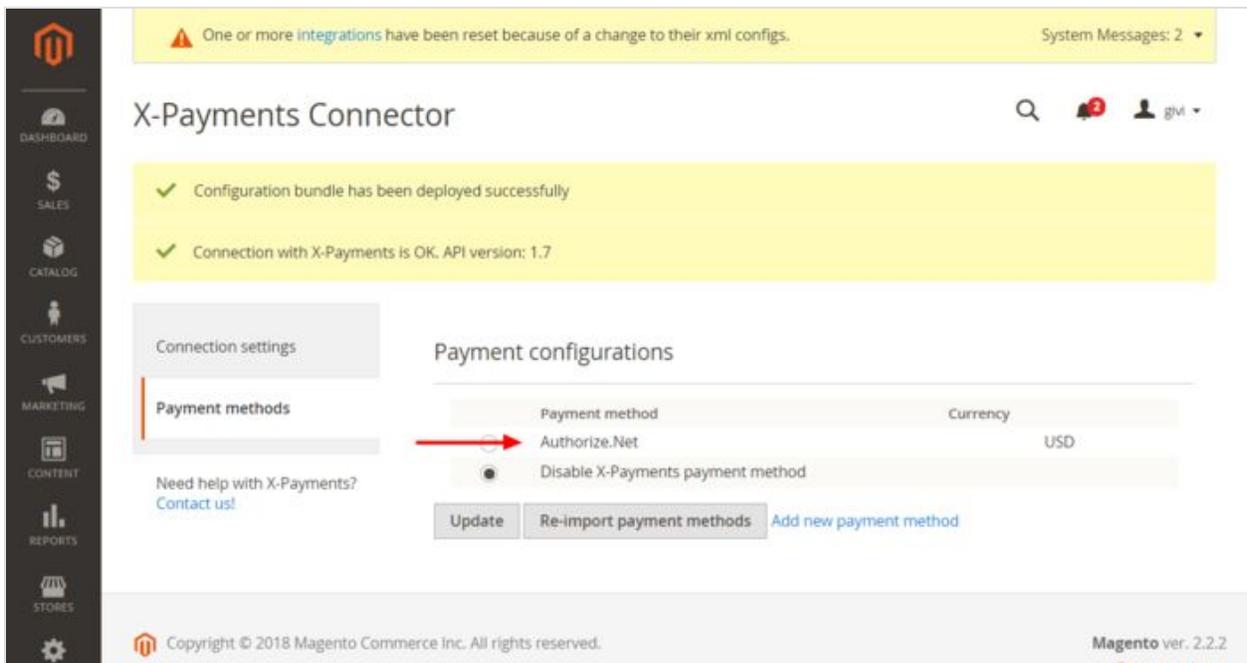
- In the details of your Magento 2 online store in the X-Payments back end, copy your X-Payments configuration bundle and paste it into the respective box in your Magento 2 Administrator panel.
- Click **Deploy**.



- 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 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 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".

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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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):

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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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 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 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.

The screenshot shows the 'X-Payments configuration bundle' settings page. On the left, a sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, and System. The 'Connection settings' tab is highlighted with a red box. Below it, there are links for 'Payment methods' and 'Need help with X-Payments? Contact us!'. The main content area is titled 'X-Payments configuration bundle' and includes instructions to copy the configuration bundle from the Online Store Details page and click 'Deploy'. A 'Deploy' button is visible. Below this is the 'Settings' section, which contains four configuration fields: 'X-Payments URL' (https://xptest.xpayments.com/), 'IP addresses for X-Payments callbacks' (52.36.122.200), 'Payment method title' (Payment method (xpc1)), and 'Payment action' (Authorize). An 'Update' button is located at the bottom of the settings section.

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

You should see that some of the settings on this page have already 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 -

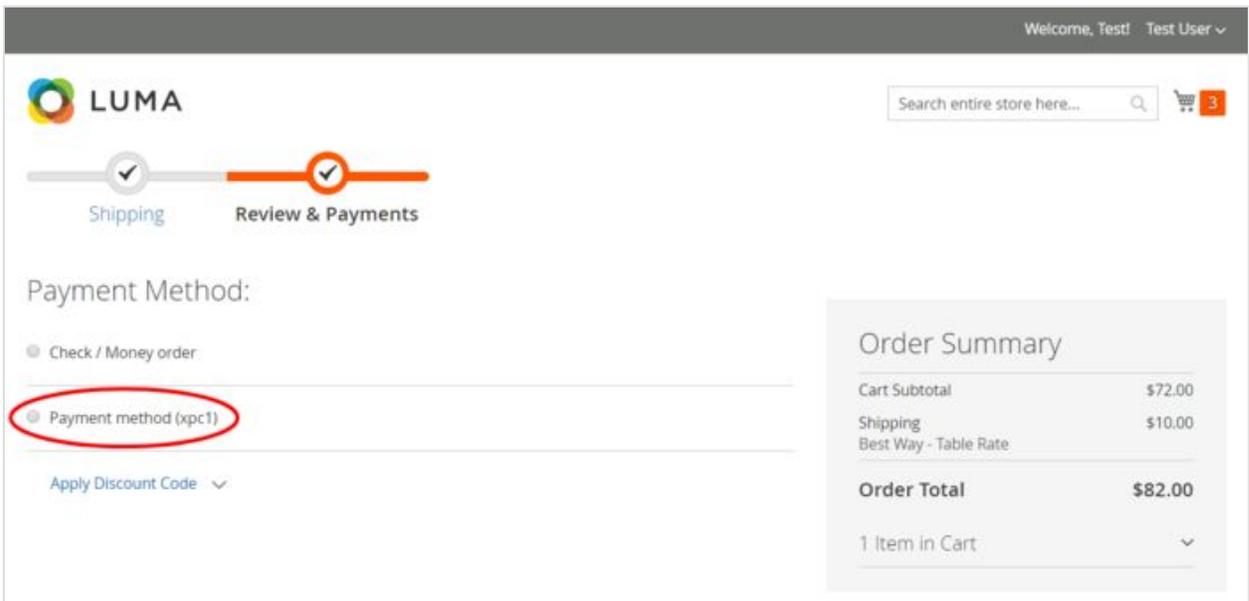
without any further interaction on your part. In X-Payments the status of such payments appears as "Charged".

- 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:



Payment Method:

Check / Money order

Payment method (xpc1)

Apply Discount Code ▾

Order Summary	
Cart Subtotal	\$72.00
Shipping Best Way - Table Rate	\$10.00
Order Total	\$82.00
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

EXPIRATION DATE CSC
 /

CARDHOLDER NAME

Place Order

Cart Subtotal	\$48.00
Shipping Flat Rate - Fixed	\$10.00
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.

Search entire store here...

[What's New](#) [Women](#) [Men](#) [Gear](#) [Training](#) [Sale](#)

Thank you for your purchase!

[Print receipt](#)

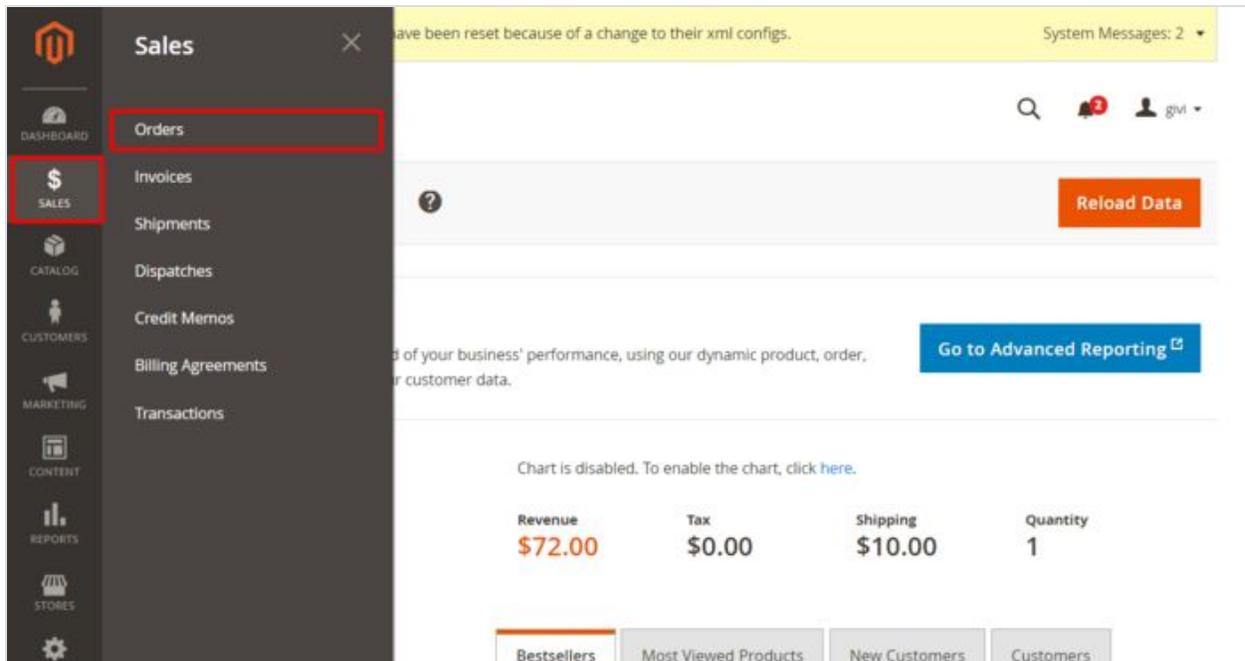
Your order number is: **00000246**.
 We'll email you an order confirmation with details and tracking info.

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**):



The screenshot shows the Magento 2 Administrator interface. On the left, a dark sidebar contains a menu with the following items: DASHBOARD, SALES (highlighted with a red box), CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, and STORES. The main content area is titled 'Sales' and features a sub-menu with 'Orders' (highlighted with a red box), Invoices, Shipments, Dispatches, Credit Memos, Billing Agreements, and Transactions. A yellow system message banner at the top reads: '...have been reset because of a change to their xml configs. System Messages: 2'. Below the menu, there is a search bar, a notification bell with a red '2', and a user profile icon labeled 'gvi'. A 'Reload Data' button is visible. A blue button labeled 'Go to Advanced Reporting' is also present. A table displays summary data:

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

At the bottom, there are tabs for 'Bestsellers', 'Most Viewed Products', 'New Customers', and 'Customers'. A message states: 'Chart is disabled. To enable the chart, click here.'

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. A sidebar on the left contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, and System. The main area has a search bar, a 'Create New Order' button, and a table with 5 records. A 'Columns' dropdown menu is open, showing a list of columns to be displayed. The 'Payment Method' column is checked and highlighted with a red box. Other visible columns include 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.

3. 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 'Payment Method' column has been added. The table now includes columns for ID, Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, Payment Method, Action, and Signifyd Guarantee Decision. The 'Payment Method' column is highlighted with a red box. The table contains three records, each with a 'View' link in the Action column.

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)	View	
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)	View	
000000070	Main Website	Feb 10, 2018 12:19:32 AM	john young	john young	\$54.00	\$54.00	Processing	Payment method (xpc1)	View	

4. 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**).

- 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 00000246. 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
00000246	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)	View	
00000245	Main Website Main	Feb 10, 2018 12:32:05 AM	Test User	Test User	\$39.00	\$39.00	Processing	Payment method (xpc1)	View	

The Information page for Order 00000246 opens:

ORDER VIEW

- Information** (highlighted)
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

Order & Account Information

Order # 00000246 (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: [Redacted]

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.

#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: WS01-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

Grand Total	\$82.00
Total Paid	\$82.00
Total Refunded	\$0.00
Total Due	\$0.00

Notify Customer by Email
 Visible on Storefront
Submit Comment

Feb 11, 2018 9:26:57 AM | Processing | Customer **Not Notified**
Captured amount of \$82.00 online. Transaction ID: "11a51be167d0b31d9c54bbf138e5c8c2"

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 store Administrator interface for order #000000246. The left sidebar shows the 'ORDERS' menu with 'Transactions' highlighted in a red box. The main content area shows the 'ORDERS' section with a search bar and a table of transactions. The table has the following data:

ID	Order ID	Transaction ID	Parent Transaction ID	Payment Method	Transaction Type	Closed
3	000000246	f1a51be167d0b31d9c54bbf138e5c8c2		Payment method (xpci)	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

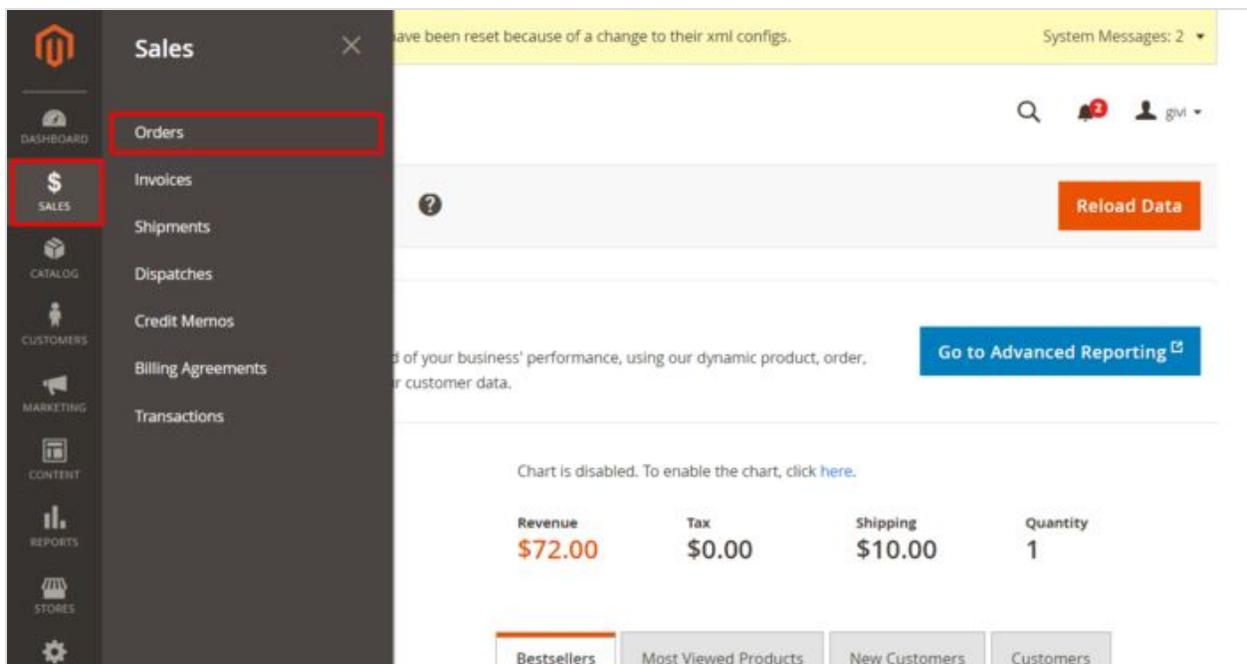
settings in Magento), an authorization and a capture are both performed at once at the time of order creation, so you do not need to worry about manually capturing the funds.

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**:



The screenshot shows the Magento Administrator interface. On the left, a dark sidebar contains a menu with icons and labels for various sections: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, and STORES. The 'SALES' section is highlighted with a red box, and a sub-menu is open, also with a red box around it, showing 'Orders', 'Invoices', 'Shipments', 'Dispatches', 'Credit Memos', 'Billing Agreements', and 'Transactions'. The main content area is titled 'Sales' and features a yellow notification banner at the top stating 'have been reset because of a change to their xml configs.' Below this, there is a search bar, a notification bell with a red '2', and a user profile icon labeled 'gvi'. A 'Reload Data' button is visible. A blue button labeled 'Go to Advanced Reporting' is also present. A summary table shows the following data:

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

At the bottom, there are four tabs: 'Bestsellers' (selected), 'Most Viewed Products', 'New Customers', and 'Customers'. A message at the bottom of the chart area states 'Chart is disabled. To enable the chart, click here.'

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

Actions 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
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)	View	
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)	View	

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

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: [\[Redacted\]](#)

Customer Group: General

4. This opens a new invoice page:

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 # 00000247 (The order confirmation email was sent)

Account Information [Edit Customer](#)

Order Date	Feb 12, 2018, 4:02:13 PM	Customer Name	Test User
Order Status	Processing	Email	mailto:admin@acme.com
Purchased From	Main Website Main Website Store Default Store View	Customer Group	General
Placed from IP	128.69.29.130		

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

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

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	2	\$48.00	\$0.00	\$0.00	\$48.00
Desiree Fitness Tee SKU: WS05-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 1	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
Grand Total	\$58.00

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.

\$

New Invoice

← Back Reset

Order Total

Invoice History

Invoice Comments

Invoice Totals

Subtotal	\$48.00
Shipping & Handling	\$10.00
Grand Total	\$58.00

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

Default View Columns Export

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	View

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*.

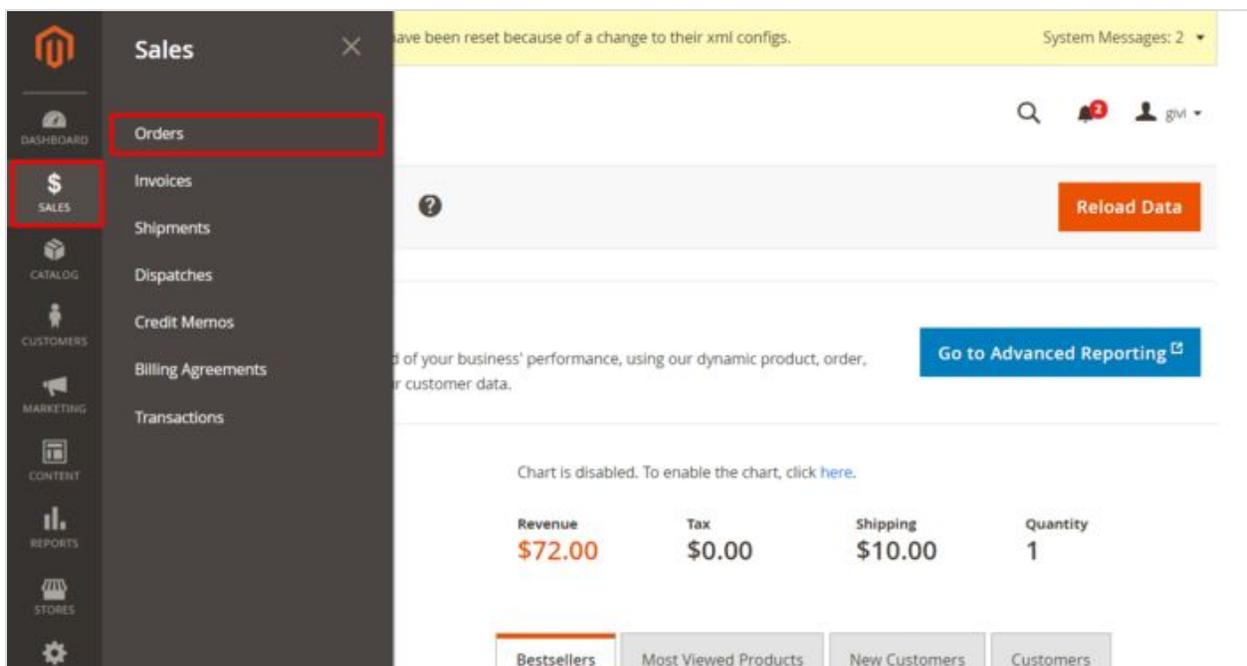
An invoice created with the "Capture Offline" or "Not Capture" option will have the status *Pending*; no transaction will be reflected in X-Payments.

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**:



The screenshot shows the Magento 2 Administrator interface. On the left, a dark sidebar menu is open to the 'Sales' section. The 'Orders' option is highlighted with a red box. Below it, other options like 'Invoices', 'Shipments', 'Dispatches', 'Credit Memos', 'Billing Agreements', and 'Transactions' are visible. The main content area shows a dashboard with a search bar, a 'Reload Data' button, and a 'Go to Advanced Reporting' button. A table displays summary statistics: Revenue (\$72.00), Tax (\$0.00), Shipping (\$10.00), and Quantity (1). At the bottom, there are tabs for 'Bestsellers', 'Most Viewed Products', 'New Customers', and 'Customers'.

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

Orders

Search by keyword

Actions 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
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)	View	
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)	View	

- 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

Actions 20 per page 1 of 1

Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
000000005	Feb 12, 2018 4:28:07 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Paid	\$58.00	View
000000006	Feb 12, 2018 4:35:12 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Pending	\$24.00	View

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

#000000247

← Back Send Email **Credit Memo** Hold Ship Reorder

ORDER VIEW

Search by keyword Default View Columns Export

Filters

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	View
<input type="checkbox"/>	000000006	Feb 12, 2018 4:35:12 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Pending	\$24.00	View

- 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: [\[Redacted\]](#)

Customer Group: General

- The New Memo page opens:

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	<input type="text" value="10"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	\$58.00

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 Search 2 gvi

← 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

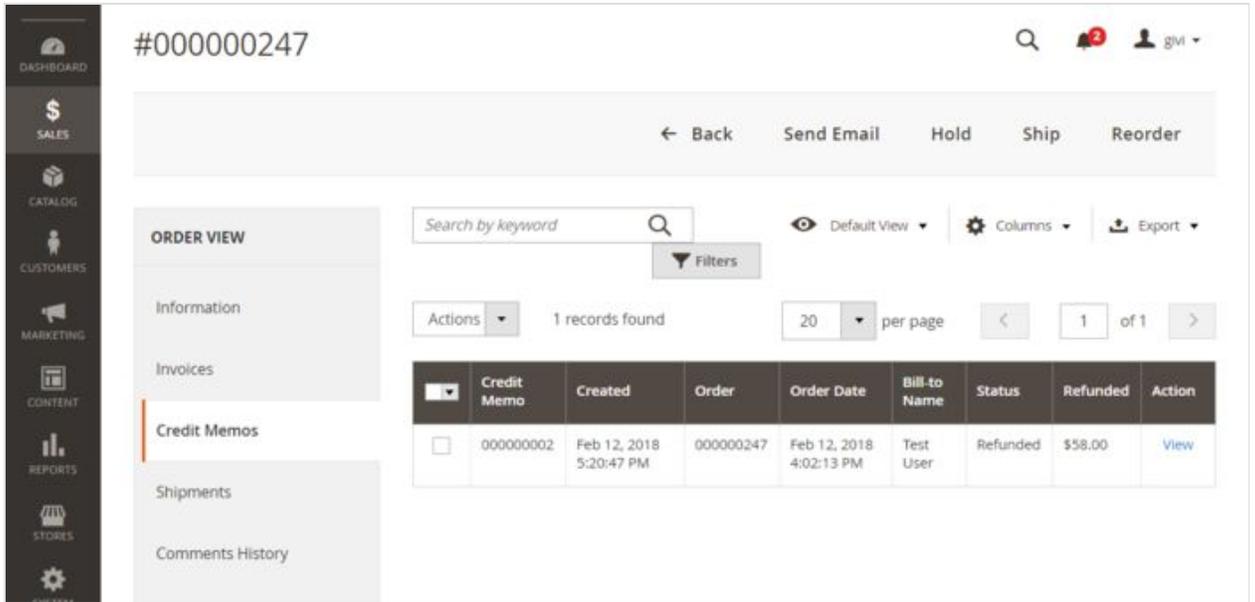
Account Information [Edit Customer](#)

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 displays the Magento 2 Admin Panel interface for order #000000247. The left sidebar contains navigation menus for 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 the following data:

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

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**:

The screenshot shows the Sales dashboard interface. On the left-hand side, there is a vertical navigation menu with several categories: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, and STORES. The 'Orders' option under the SALES category is highlighted with a red rectangular box. The main content area of the dashboard displays a system message at the top, a search bar, a 'Reload Data' button, and a 'Go to Advanced Reporting' button. Below this, there is a summary section with a disabled chart and a table showing key metrics: Revenue (\$72.00), Tax (\$0.00), Shipping (\$10.00), and Quantity (1). At the bottom, there are tabs for 'Bestsellers', 'Most Viewed Products', 'New Customers', and 'Customers'.

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

The screenshot shows the 'Orders' list view. The left-hand side navigation menu is visible, with 'SALES' selected. The main content area features a 'Create New Order' button at the top right. Below the button is a search bar labeled 'Search by keyword' and a 'Filters' button. There are also options for 'Default View', 'Columns', and 'Export'. The table below shows 7 records found, with 20 items per page. The table has the following columns: ID, Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, Payment Method, Action, and Signifyd Guarantee Decision. Two orders are visible in the 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
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)	View	
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)	View	

3. 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	View

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)

Account Information [Edit Customer](#)

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

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:

#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: [Redacted]

Customer Group: General

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

#000000248

← Back Cancel Send Email Void Hold Invoice Ship Reorder

Search by keyword

Actions 1 records found 20 per page 1 of 1

<input type="checkbox"/>	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	View

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*.