

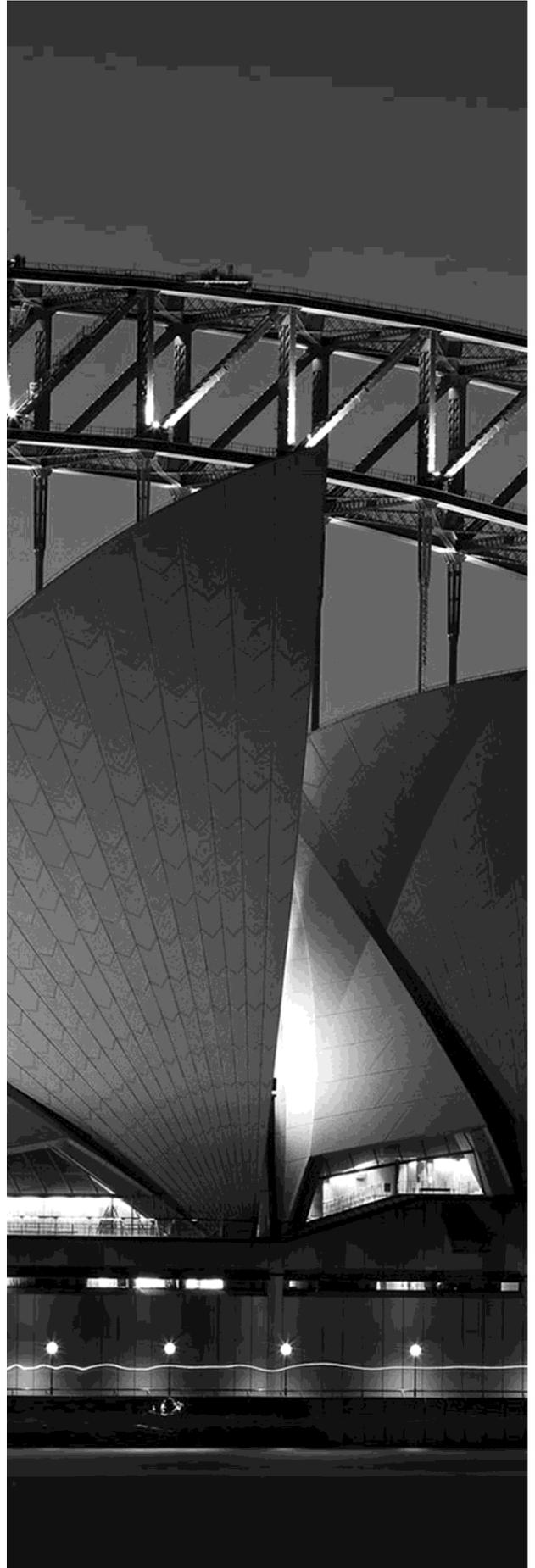


PARTIAL PAYMENTS

User Guide

v.1.0.3

11/02/2018



About Partial Payments extension.

The Partial Payments extension for Magento 2 provides an ability to set up an arbitrary amount to be paid for an order or even to pay for several orders in one payment. Orders could be paid partially in both ways – by the admin from the back-office and by the customer from My Account storefront section. The extension supports all Magento native payment methods, including Braintree's PayPal and Braintree's Credit Card.

Storefront features

- The customer is able to select Partial Payment method on checkout.
- Partial Payment orders are available on a separate section in My Account and the customer is able to specify an arbitrary amount and make a payment.
- The customer has an ability to pay for several orders in one payment.
- Partial Payments extension functionality may be disabled on storefront in module settings, if required.

Back-office features

- The website admin is able to select Partial Payment while creating an order from the admin panel, and then create an invoice with any required amount.
- The admin is able to set up custom template for email notifications with outstanding amount to be paid.
- The Partial Payment functionality can be disabled for the first customer's order, so in this case this feature will be available for the customer only after the first success order.

Initial configuration.

Stores > Configuration > Ewave Extensions > Partial Payment

Setting Name	Values	Description
Enable Partial payment	Yes/No	Enable/Disable the extension
Complete Order Status	Multiple select with order statuses list	This setting does not affect customer's first order, but if there is at least one order in selected status, user can proceed with partial payment for its second and following orders
Outstanding invoice email template	List	Ability to choose a template for outstanding invoice. Additional templates can be created through Marketing>Email Templates
Round Payer Item Quantity In Email	Yes/No	You have ability to allow rounding to integers in emails. Quantity will be rounded down to the integer (e.g. 12.2 -> 12; 0.8 -> 0)
Enable Zero Payment Partial Invoice for Admin	Yes/No	Ability to create a zero invoice for admins

Stores > Configuration > SALES > Payments Methods > Partial Payment (section)

Setting Name	Values	Description
Enabled	Yes/No	Ability to switch off Partial Payment method
Title	Text field	Title for the partial payment method
Can Capture First Invoice	Yes/No	Ability to create the first order in "done" status. "Yes" means that the first order can be created and marked as paid offline. "No" allows to create the first invoice only in the "pending" state
Allow For the First Invoice	Yes/No	Is the partial payment method applicable for the first order of the customer
Enabled on Front	Yes/No	Allows to display partial payment method on storefront
New Order Status	Yes/No	Ability to create a zero invoice for admins
Payment from Applicable Countries	Allowed for all/for specific countries	You may set up allowed for the partial payments list of countries
Sort Order	Text	You may specify a sort order for the partial payment method

Partial Payments for back-office.

1. Extension supports all Magento native payment methods, include Braintree's PayPal and Braintree's Credit Card. So, on the Sales > Orders > Create New Order page website admin will be able to use 'Partial payment section' for all Braintree payment methods and for custom 'Partial Payment' method (if it's enabled in settings):

Payment & Shipping Information

Payment Method

Make zero payment

No ▾

- Stored Accounts (Braintree PayPal)
- Check / Money order
- Stored Cards (Braintree)
- Credit Card (Braintree)

* Credit Card Type

Visa ▾

* Credit Card Number

* Expiration Date

MM / YY

* Card Verification Number

Save for later use.

Partial Invoice (Don't pay full amount right now)

Partial payment section

Would you like to pay partially

Yes ▾

Pay Amount

50

Shipping Method *

[Get shipping methods and rates](#)

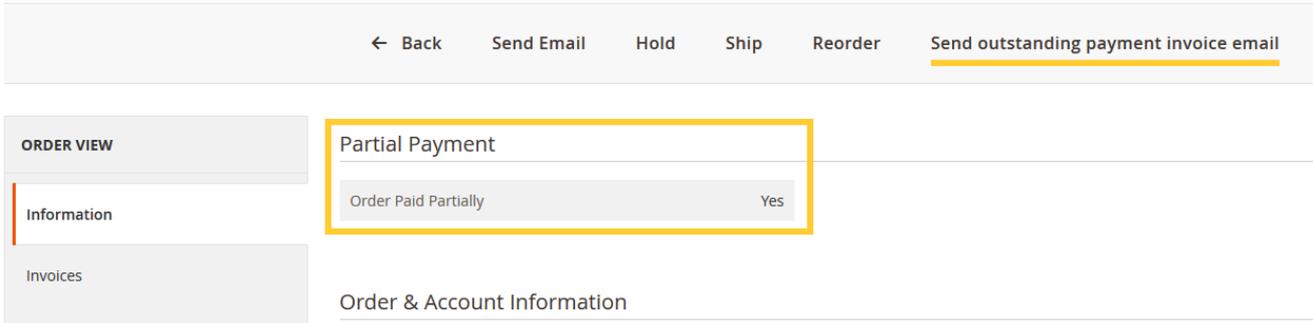
If 'Would you like to pay partially' option is set up to 'Yes' - 'Pay Amount' input will be available in this section, so admin could define initial amount to be paid.

System will generate an Invoice with a defined amount after an order will be placed. Pay Amount could be set as '0' (means that nothig should be paid right now) – so, zero Invoice will be generated in this case.

For all further actions with an order go to the Sales > Orders > View Order Detail Page

Also there is 'Partially Paid' filter/column available for the Orders grid, so you could enable it if you need.

2. At the Sales > Orders > View Order Detail Page in the backoffice admin could see 'Partial Payment' section at the top of all tabs:



Here you can see if the Order has been partially paid or not. System will set this option to 'Yes' after you create an Order with a 'Would you like to pay partially' option is set up to 'Yes', and will set it to 'No' automatically when the while Order amount will be paid (e.g. all Order's Invoices).

Also admin is able to use 'Send outstanding payment invoice email' button to send a reminder for a customer with the amount should be paid for the Order. Email template should be set in 'Outstanding invoice email template' module setting.

3. To pay for the Order partially admin should go to the 'Invoices' tab and create a new Invoice. In Payment Section all payment methods that supports Partial Payment will be available for selection.

If 'Would you like to pay partially' setting will be set up to 'No' – Invoice will be created for a full Due amount.

If this setting will be set up to 'Yes' – admin will be able to set Invoice amount using 'Pay Amount' input.

Payment Section

Make zero payment

No ▾

- Stored Accounts (Braintree PayPal)
- Stored Cards (Braintree)
- Credit Card (Braintree)
- Partial Invoice (Don't pay full amount right now)

Partial payment section

Would you like to pay partially

Yes ▾

Pay Amount

49

Order Total

Partial Payments on storefront.

1. 'Partial Payment' method should be configured and enabled for storefront functionality to be available. This should be done at 'Stores > Configuration > SALES > Payments Methods > Partial Payment (section)'. Then customer will be able to select 'Partial Payment' method on checkout (title could be configured in settings):

Shipping Review & Payments

Payment Method:

Check / Money order

PayPal (Braintree)

Credit Card (Braintree)

Partial Invoice (Don't pay full amount right now)

My billing and shipping address are the same

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

[Place Order](#)

[Apply Discount Code](#) ▾

Order Summary

Cart Subtotal	\$34.64
Shipping Flat Rate - Fixed	\$5.00
Tax	\$2.64 ▾
Order Total Incl. Tax	\$39.64
Order Total Excl. Tax	\$37.00
1 Item in Cart	▾

Ship To: ✎

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

Shipping Method: ✎

Flat Rate - Fixed

2. When this kind of Order will be placed customer should go to 'My Account > Partially Paid Orders' section to pay for an Order(s):

Account Dashboard

- My Orders
- My Downloadable Products
- My Wish List

- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements

- My Product Reviews
- Newsletter Subscriptions
- Partially Paid Orders

My Dashboard

Account Information

Contact Information

Veronica Costello
roni_cost@example.com
[Edit](#) [Change Password](#)

Address Book [Manage Addresses](#)

Default Billing Address

Veronica Costello

Newsletters

You aren't subscribed to our newsletter.
[Edit](#)

Default Shipping Address

Veronica Costello

3. On 'Partially Paid Orders' page customer will see list of Orders that could be paid partially:

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

- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements

- My Product Reviews
- Newsletter Subscriptions
- Partially Paid Orders

My Orders

Select	Order #	Date	Ship To	Order Total	Status	Action	Payment Amount
<input checked="" type="checkbox"/>	000000072	9/21/18	Veronica Costello	\$162.38	Processing	View Order	150
<input checked="" type="checkbox"/>	000000067	9/20/18	Veronica Costello	\$39.64	Pending	View Order	39.64

Invoice total: **\$189.64**

2 Item(s) Show per page

Payment Method:

PayPal (Braintree)

Save for later use. [?](#)

Credit Card (Braintree)

[Continue to PayPal](#)

Compare Products

You have no items to compare.

Recently Ordered

On this page customer is able to select one or several Order that he want to pay for and define payment amount. All payment methods that are supported by Partial Payment extension are available for making a payment. In native Magento installation there are Braintree's PayPal and Braintree's Credit Card payments. Invoice total line shows payment amount and you can pay for a number of orders by one payment.