

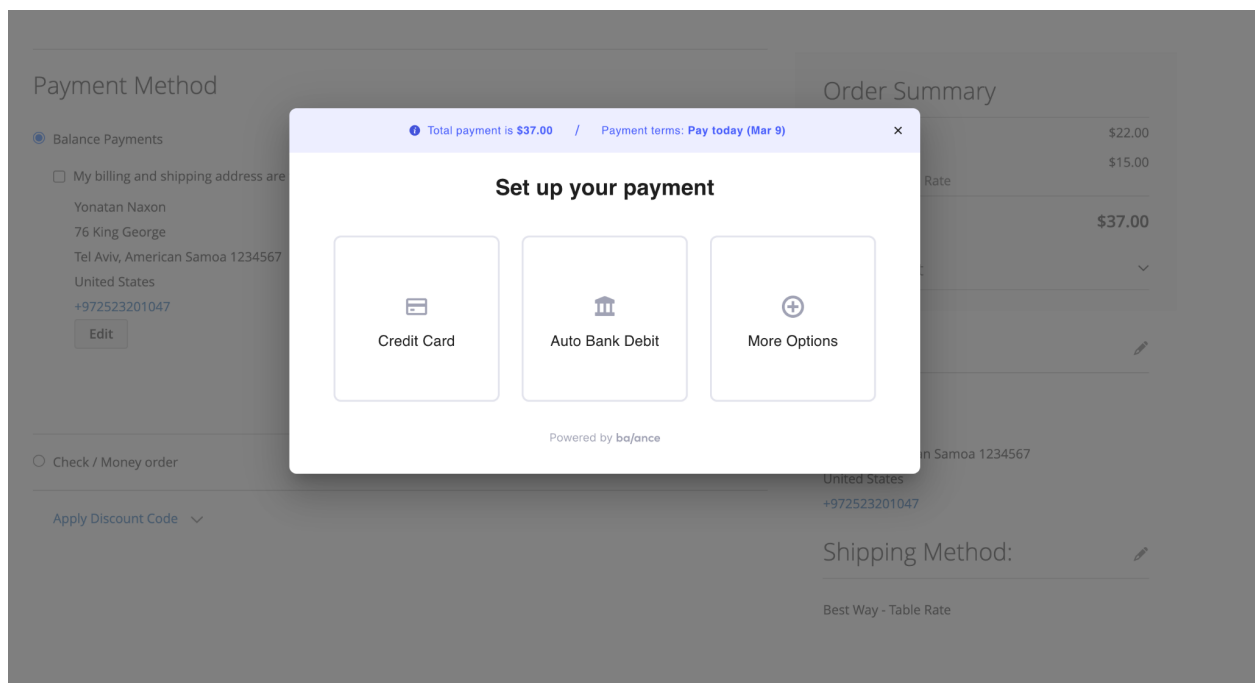
Balance Checkout

[Balance](#) is a B2B payments experience company offering the first online checkout built for businesses. With Balance, companies can process any payment method, offer flexible terms, and get paid instantly — all in one place.

This extension allows adding Balance Checkout as a new payment method for the site.

Please note: We do not support Multi Shipping Checkout. In such cases, the Balance payment method will not appear on the checkout flow.

An example of Balance Checkout:



Balance Account Setup

To integrate Balance Checkout, create an account using Balance website: <https://www.getbalance.com/balance-welcome>

After the account is created, you can generate an API key from the Balance Dashboard.

Extension Configuration

After installing the extension, you will need to enable Balance as a payment method, and configure:

1. API Key for balance account
2. Mode - sandbox or production
3. Allowed customer groups – which groups can pay with Balance
4. Allowed Payment Methods - what payment method to allow the buyer (bank, card, invoice, pay with terms)
5. Logo that will be displayed on the Balance Checkout dialog

Balance Payments

Enabled (Share view) Yes Use system value

Module Version 1.3.4

Title (Share view) Balance Use system value

Mode (Share view) Sandbox Use system value

Terms Options (In Days) (Share view)

- 15
- 30
- 45
- 60

Sandbox API Key (Share view) ***** Use system value
Value provided by Balance.

Logo Image (Share view) No file chosen

Use Auth/Capture (isAuth) (Share view) No Use system value

Allowed Payment Methods (Share view)

- Credit Card
- Bank
- Pay With Terms
- Invoice

Payment methods that should be displayed on the Balance payment popup.

Allowed Payment Methods: Terms (Share view)

- Credit Card
- Bank
- Invoice

Payment methods enabled when the buyer is paying on net terms.

Allowed Customer Groups (Share view)

- Example
- Example 2
- General
- New Example
- Retailer
- Wholesale

Customer Groups that are allowed to use Balance payment method.

Tracking orders

For any order processed by Balance Payments, you can see the id in the order details, so you can later track the transaction in the Balance Dashboard if needed.

Payment Information

Balance Payments

Balance Checkout Token: 956-0396e264-8dbd-4c01-a312-f941c8bba6ad

Balance Charge ID: 7711

Assigning specific vendors to products

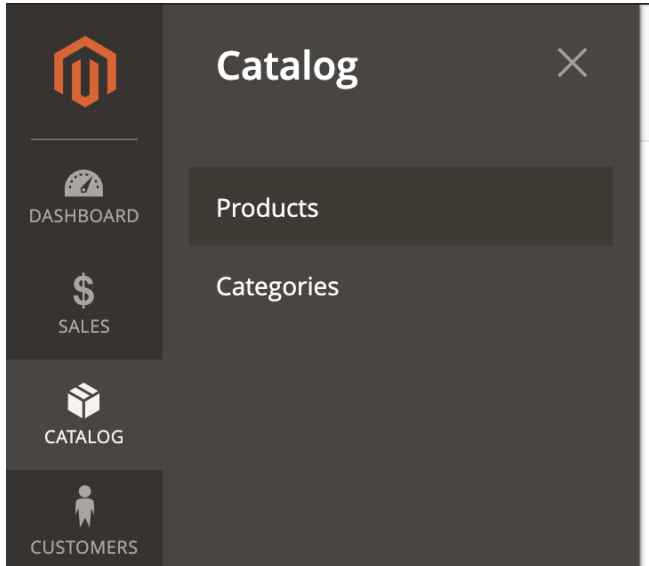
1. On Balance dashboard, create a vendor by clicking on Vendors link on side navigation, and then hitting “Add button”

The screenshot shows the 'Vendors' management interface. A modal window titled 'Add a new vendor' is open, allowing the user to create a new vendor. The form includes the following fields:

- Business Name:** A text input field with the placeholder 'Enter business name'.
- Website:** A text input field with the placeholder 'www.yoursite.com'.
- Email:** A text input field with the placeholder 'email@gmail.com'.
- Phone number:** A field with a country code dropdown (currently showing '+1') and a text input field.
- Employer identification Number:** A text input field with the placeholder '11-1111111'.
- Bank account number:** A text input field with the placeholder '000123456789'.
- Routing Number:** A text input field with the placeholder '110000000'.

Below the form is an 'Add Address' button. At the bottom of the modal are 'Cancel' and 'Add Vendor' buttons. The background shows a table of existing vendors with columns for 'BUSINESS NAME' and 'DATE ADDED'. The table contains several entries, including 'Test Vendor 3', 'Test Vendor 2', 'Test Vendor 1', 'Business', and 'test name'. A '+ ADD NEW VENDOR' button is visible at the bottom left of the page.

2. Go to 'Catalog' -> 'Products'



3. Select a product and click to open it's details
4. Go to "Assign Product to Vendor" section
5. Choose vendor from list

Assign Product to Vendor

