

Store Credit for Magento 2 User Guide

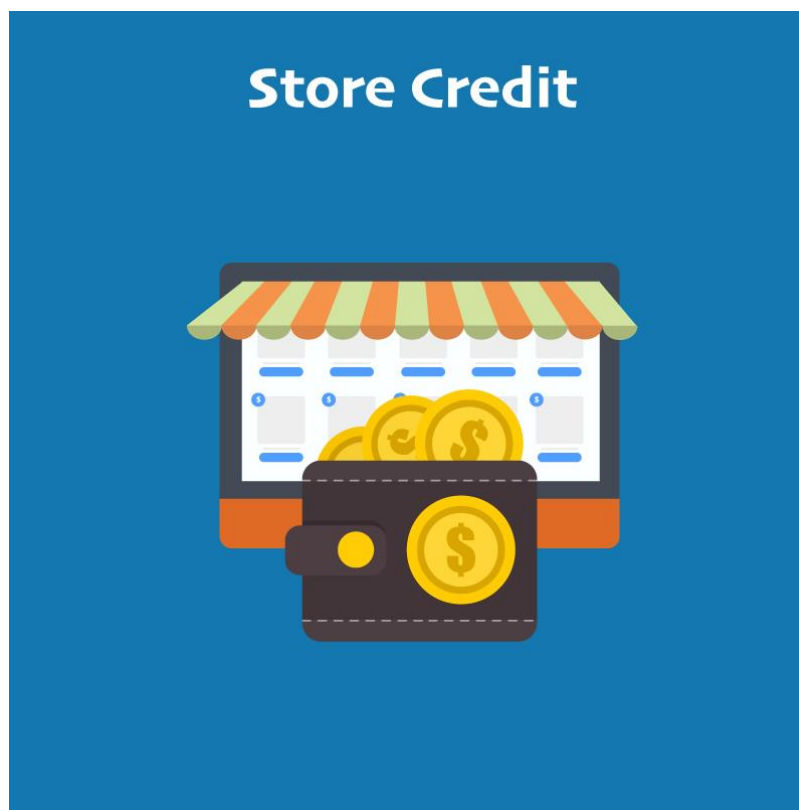


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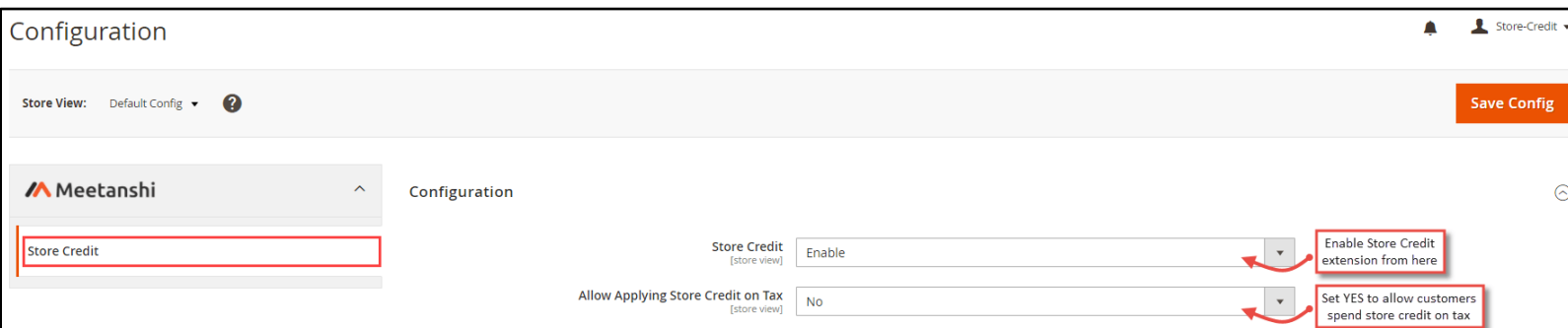
1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/StoreCredit
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/StoreCredit via FTP.
- Login to your SSH and run below commands step by step:
 - php bin/magento setup:upgrade
 - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
 - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
 - php bin/magento cache:flush

2. Configuration

To configure the extension, login to Magento 2 backend, move to **Stores → Configuration → Meetanshi → Store Credit** where you can find various settings to configure the extension.

- **Store Credit:** Enable or disable Store Credit extension from here.
- **Allow Applying Store Credit on Tax:** Select YES to allow customers spend store credit on tax.



Configuration

Store View: Default Config

Save Config

Meetanshi Configuration

Store Credit [store view] Enable

Allow Applying Store Credit on Tax [store view] No

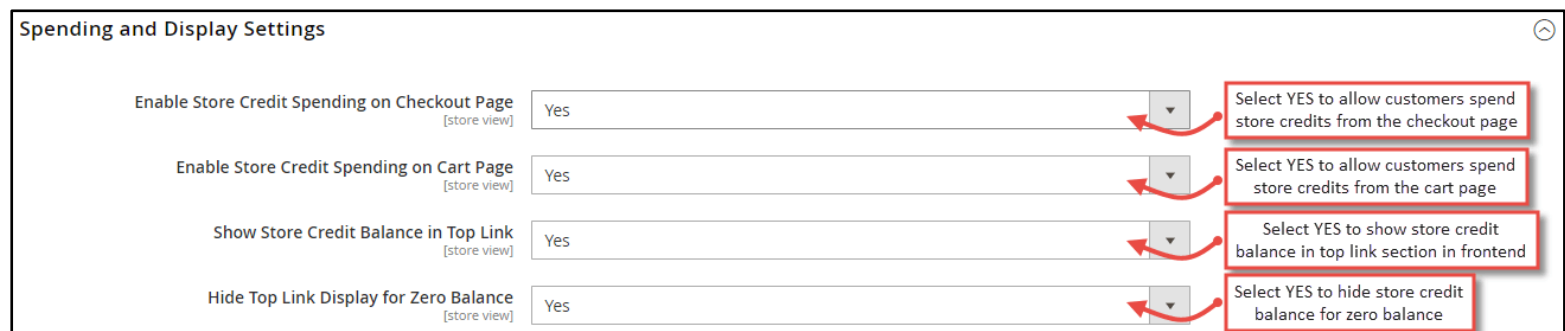
Enable Store Credit extension from here

Set YES to allow customers spend store credit on tax

3. Spending and Display Settings

Configure the settings for where the customer can spend the store credits and how store credit balance is showed in the frontend.

- **Enable Store Credit Spending on Checkout Page:** Set YES to allow customers spend store credits from the checkout page in the frontend.
- **Enable Store Credit Spending on Cart Page:** Set YES to allow customers spend store credits from the cart page in the frontend.
- **Show Store Credit Balance in Top Link:** Set YES to show store credit balance of the customer in top link if the customer is logged in.
- **Hide Top Link Display for Zero Balance:** Set YES to hide store credit balance from the top link when the balance is zero.



Spending and Display Settings

Enable Store Credit Spending on Checkout Page [store view] Yes

Enable Store Credit Spending on Cart Page [store view] Yes

Show Store Credit Balance in Top Link [store view] Yes

Hide Top Link Display for Zero Balance [store view] Yes

Select YES to allow customers spend store credits from the checkout page

Select YES to allow customers spend store credits from the cart page

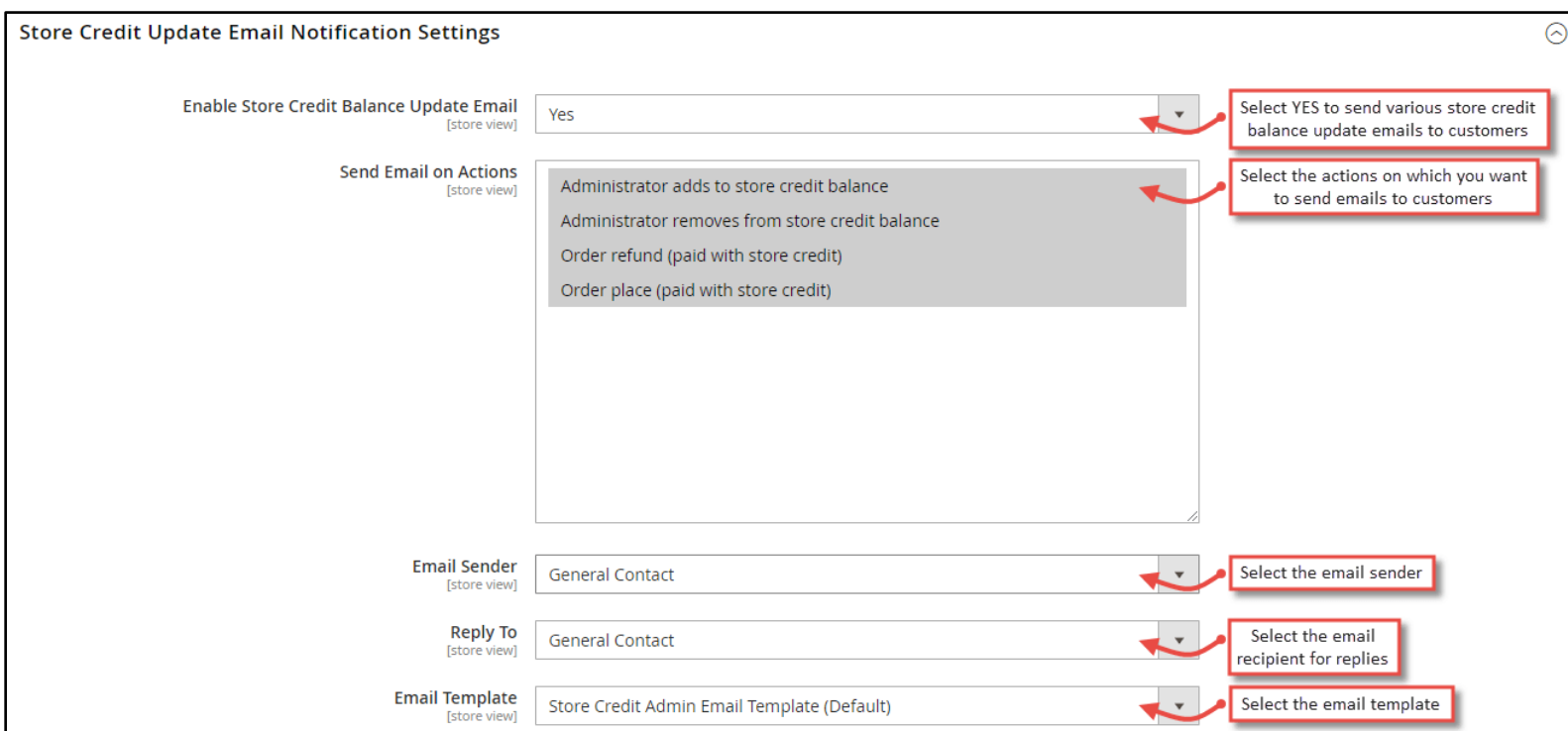
Select YES to show store credit balance in top link section in frontend

Select YES to hide store credit balance for zero balance

4. Store Credit Update Email Notification Settings

The extension allows sending store credit update email notifications on various actions. Here, configure the settings for the same.

- **Enable Store Balance Update Email:** Set YES to send email notifications to the customers on store credit balance update.
- **Send Email on Actions:** Select the actions on which you want to send the email notifications to the customers.
- **Email Sender:** Select the email sender.
- **Reply To:** Select the contact to which the email replies would be received.
- **Email Template:** Select the email template.



Store Credit Update Email Notification Settings

Enable Store Credit Balance Update Email [store view] Yes

Send Email on Actions [store view]

- Administrator adds to store credit balance
- Administrator removes from store credit balance
- Order refund (paid with store credit)
- Order place (paid with store credit)

Email Sender [store view] General Contact

Reply To [store view] General Contact

Email Template [store view] Store Credit Admin Email Template (Default)

Select YES to send various store credit balance update emails to customers

Select the actions on which you want to send emails to customers

Select the email sender

Select the email recipient for replies

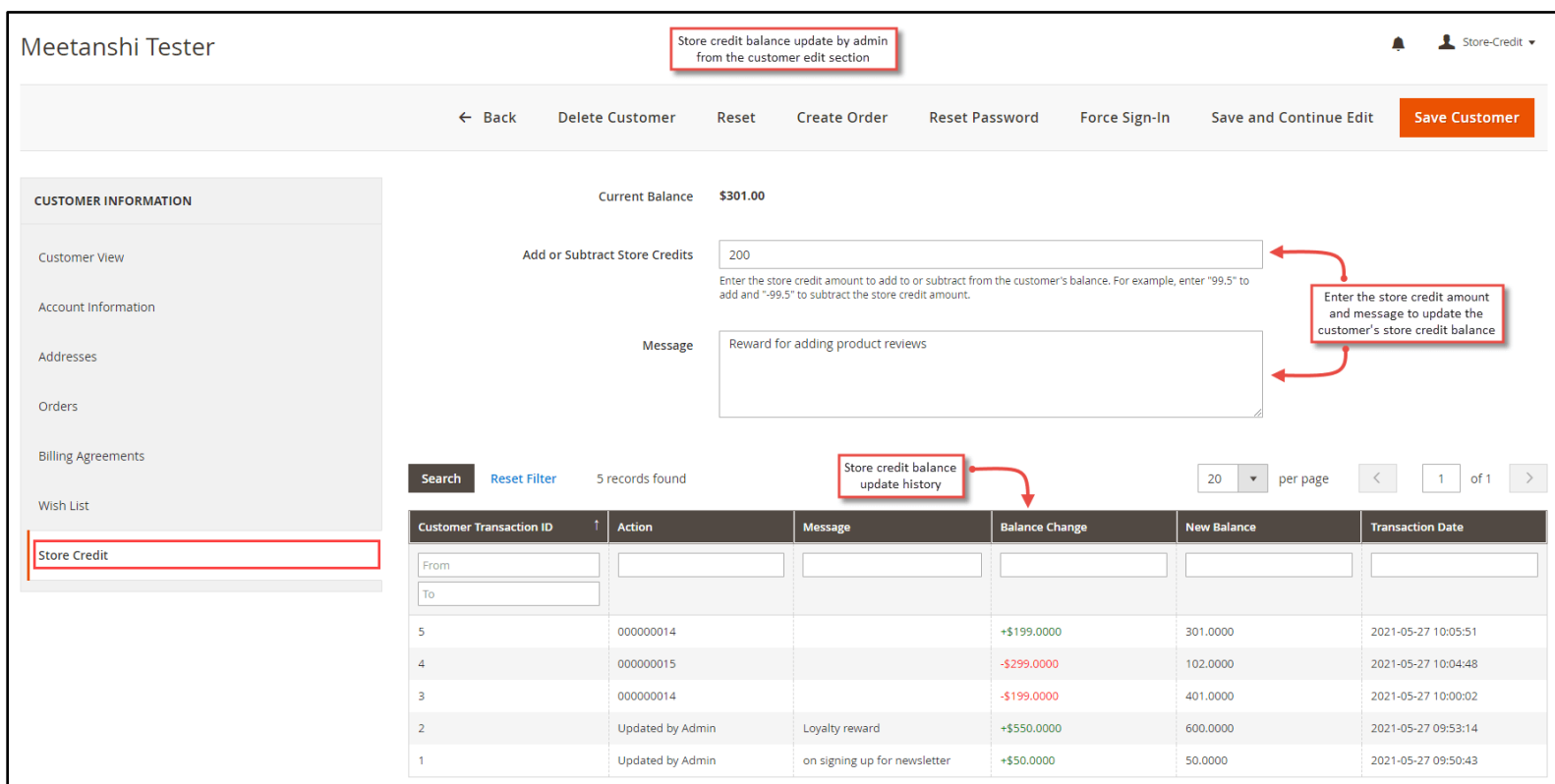
Select the email template

5. Store Credit Balance Update from the Backend

The admin can add or remove store credits from the **Customers > All Customers > Customer edit** section in the backend.

- **Add or Subtract Store Credits:** Enter the store credit amount to add or remove from the customer's account. For example, enter 100 to add and -100 to remove the store credits respectively.
- **Message:** Enter the message or reason why you are adding or removing the store credits if required.

All the store credit update transactions are listed here with the details like customers transaction ID, action, message, balance change, new balance and transaction date.



Meetanshi Tester

Store credit balance update by admin from the customer edit section

← Back Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Billing Agreements
- Wish List
- Store Credit**

Current Balance **\$301.00**

Add or Subtract Store Credits

Enter the store credit amount to add to or subtract from the customer's balance. For example, enter "99.5" to add and "-99.5" to subtract the store credit amount.

Message

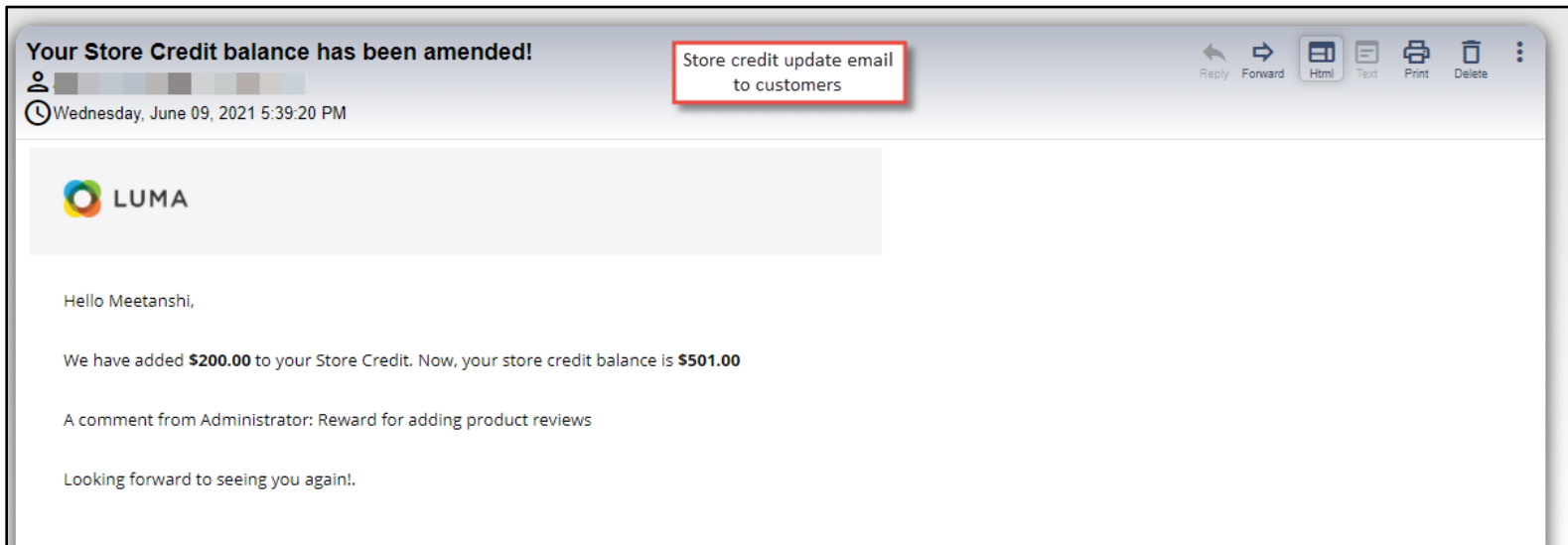
Enter the store credit amount and message to update the customer's store credit balance

Search [Reset Filter](#) 5 records found **Store credit balance update history** 20 per page 1 of 1

Customer Transaction ID	Action	Message	Balance Change	New Balance	Transaction Date
From					
To					
5	000000014		+\$199.0000	301.0000	2021-05-27 10:05:51
4	000000015		-\$299.0000	102.0000	2021-05-27 10:04:48
3	000000014		-\$199.0000	401.0000	2021-05-27 10:00:02
2	Updated by Admin	Loyalty reward	+\$550.0000	600.0000	2021-05-27 09:53:14
1	Updated by Admin	on signing up for newsletter	+\$50.0000	50.0000	2021-05-27 09:50:43

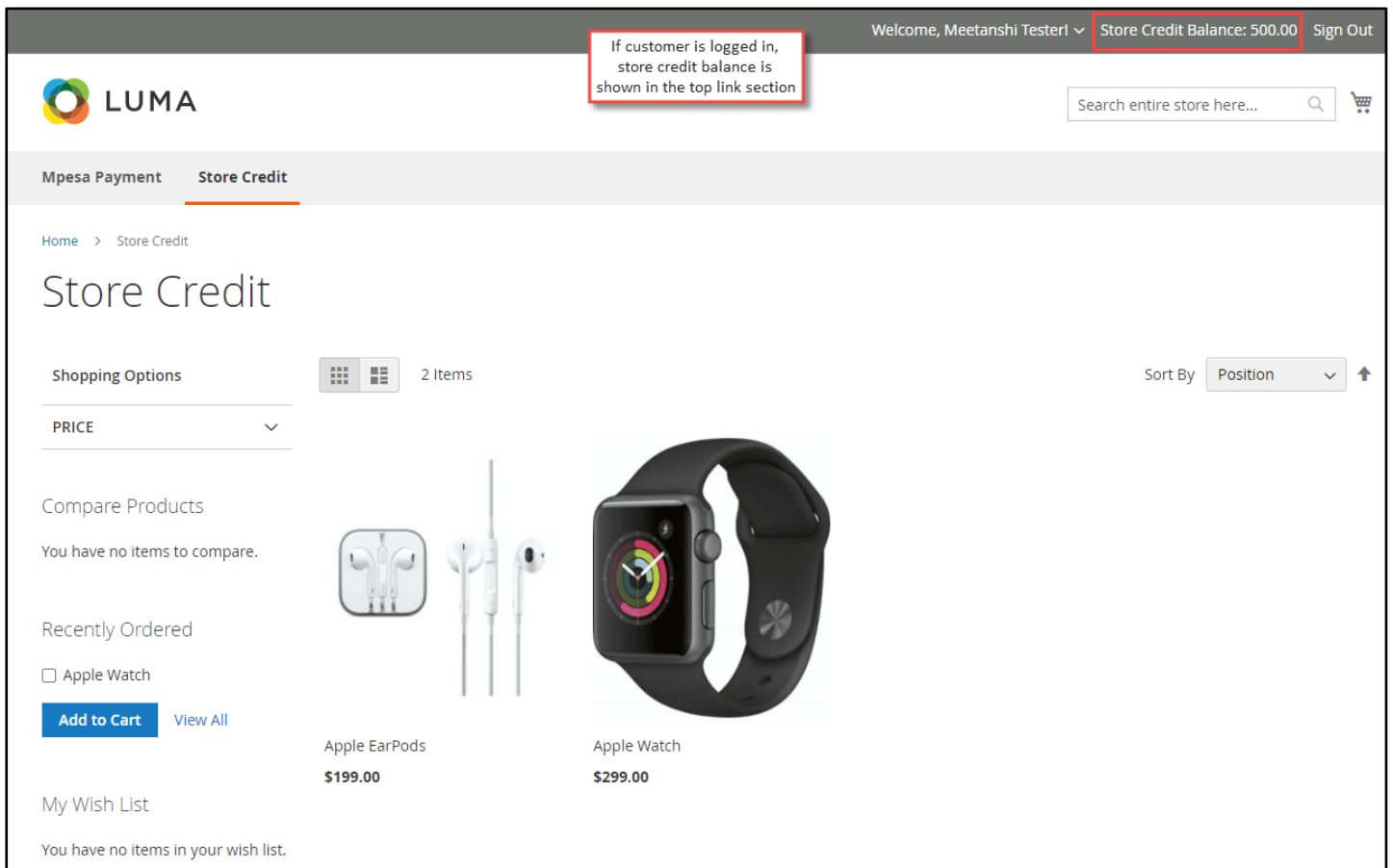
- **Store Credit Update Email to Customers**

Immediately after the admin adds store credits to the customer account, the customer gets email notification.



6. Store Credit in Frontend

After configuring the extension, whenever the customer logs in to the account, he can see store credit balance in the top link section if the store credit balance is not zero.




- **Store Credits Spending from the Cart Page**

Immediately after the customer adds a product to cart, he can spend the store credits from the cart page. He can enter the store credits to be spent and click **“Spend Store Credit”** button.

Shopping Cart

Customers can spend the store credits from the cart page

Item	Price	Qty	Subtotal
 Apple Watch	\$299.00	1	\$299.00

[Move to Wishlist](#) [Edit](#) [Delete](#)

[Update Shopping Cart](#)

[Apply Discount Code](#) [Spend Store Credits](#)

Your Store Credit Balance **\$500.00**

[Spend Store Credit](#)

Enter the amount and click "Spend Store Credit" button to use the credits for product purchase

Summary

Estimate Shipping and Tax

Subtotal \$299.00

Shipping (Flat Rate - Fixed) \$5.00

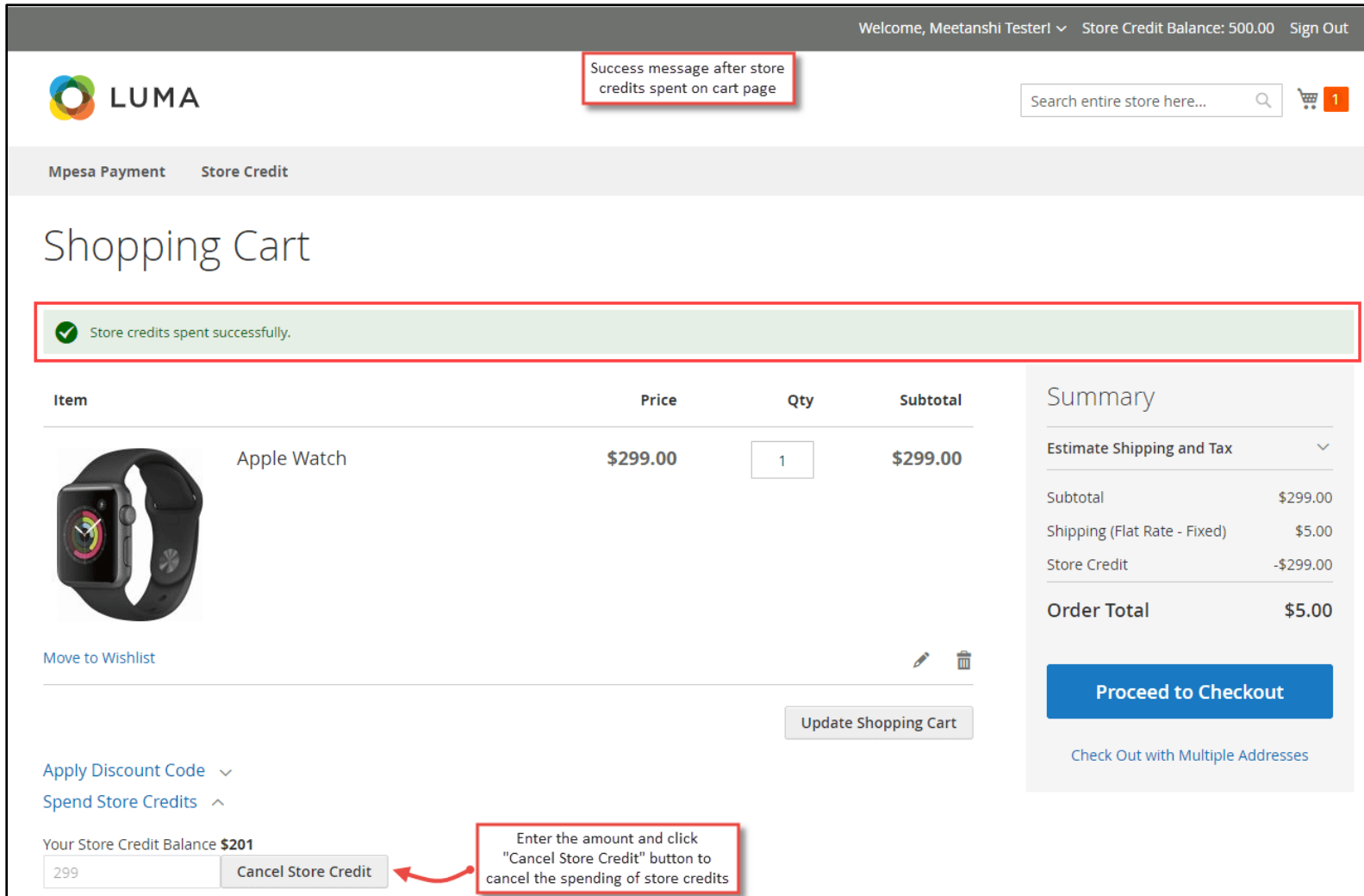
Order Total \$304.00

[Proceed to Checkout](#)

[Check Out with Multiple Addresses](#)


- **Store Credits Spending Success Message on Cart Page**

The extension shows success message on spending of store credits from the cart page. The customer can also cancel the spent store credits by entering the store credits and clicking “Cancel Store Credit” button.



The screenshot shows the LUMA shopping cart interface. At the top, a dark navigation bar contains the text "Welcome, Meetanshi Tester!" and "Store Credit Balance: 500.00 Sign Out". Below this, the LUMA logo is on the left, and a search bar and shopping cart icon (with a '1' badge) are on the right. A red box highlights a success message: "Success message after store credits spent on cart page".

The main content area is titled "Shopping Cart". A green banner with a checkmark icon displays the message: "Store credits spent successfully." Below this is a table with the following items:

Item	Price	Qty	Subtotal
 Apple Watch	\$299.00	1	\$299.00

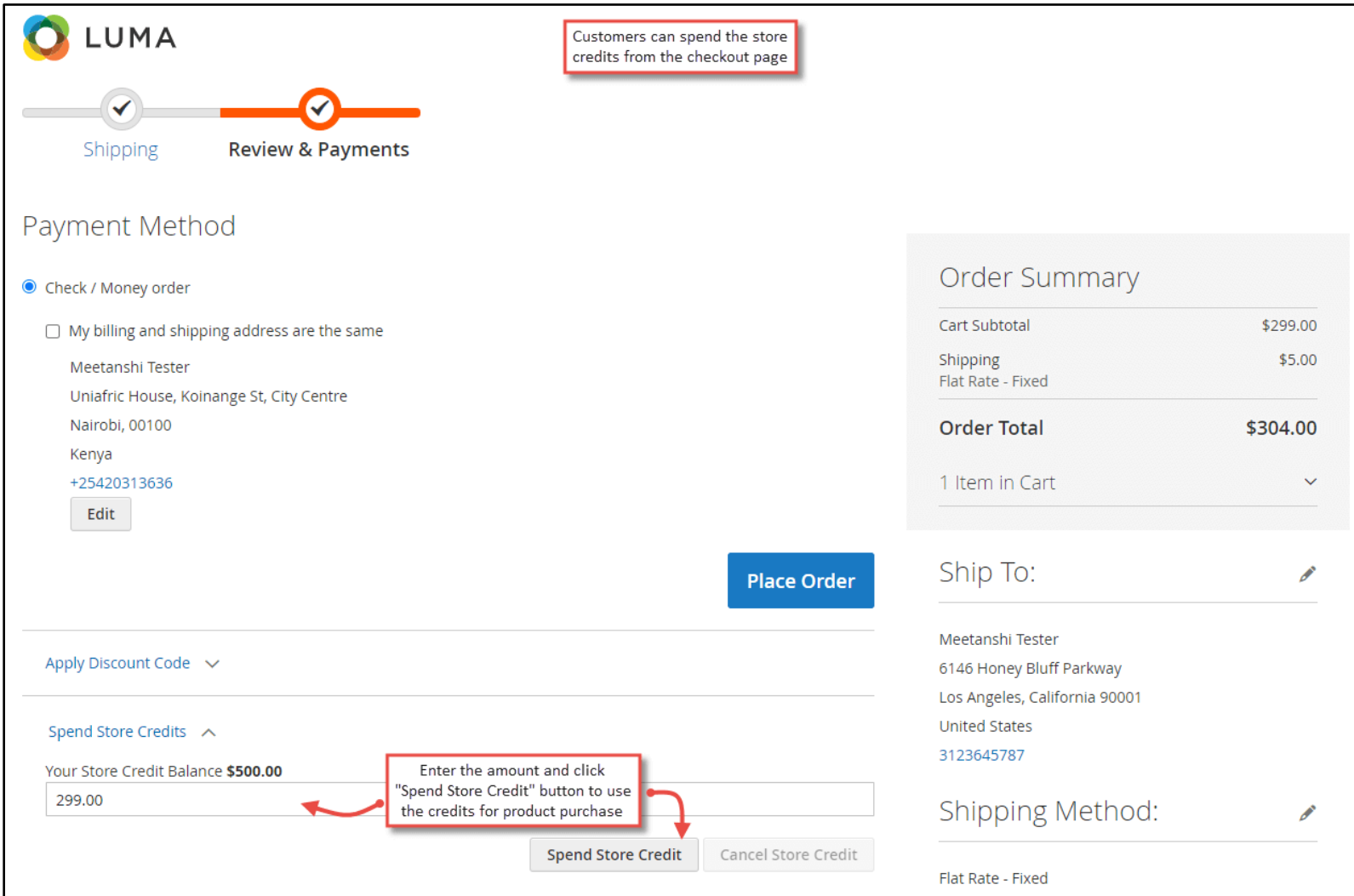
Below the table, there are links for "Move to Wishlist" and "Update Shopping Cart". To the right, a "Summary" sidebar shows:

- Estimate Shipping and Tax (dropdown)
- Subtotal: \$299.00
- Shipping (Flat Rate - Fixed): \$5.00
- Store Credit: -\$299.00
- Order Total: \$5.00**

A blue "Proceed to Checkout" button is located below the summary. At the bottom left, there is a section for "Your Store Credit Balance \$201" with an input field containing "299" and a "Cancel Store Credit" button. A red box highlights this button with the text: "Enter the amount and click 'Cancel Store Credit' button to cancel the spending of store credits".

- **Store Credits Spending from the Checkout Page**

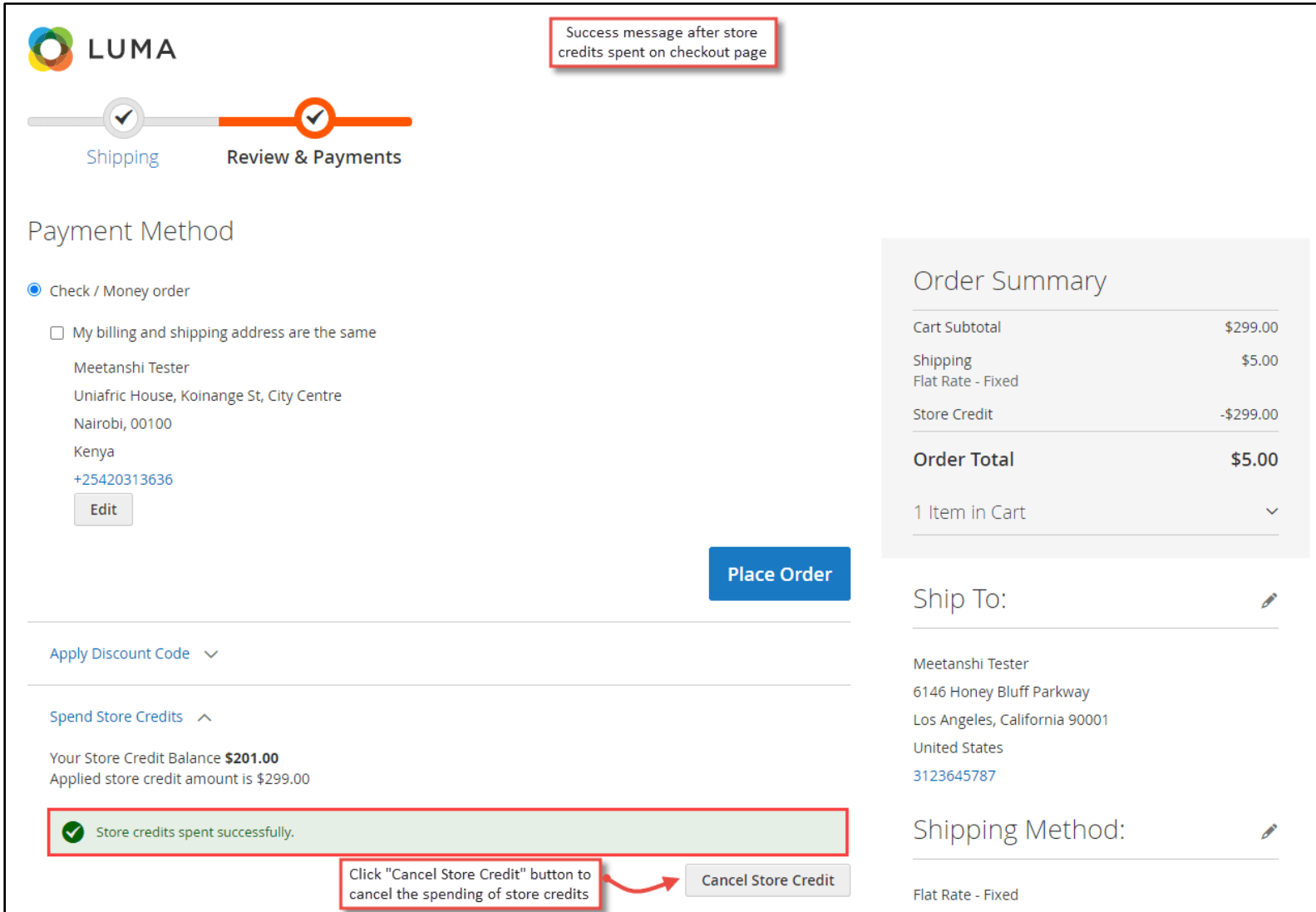
If after adding the products to the cart, customer directly moves to the checkout page, he can spend the store credits from the checkout page. He has to enter the store credits to be spent and click **"Spend Store Credit"** button.



The screenshot shows the LUMA checkout page. At the top, there is a progress bar with two steps: 'Shipping' (completed) and 'Review & Payments' (active). A red box highlights the text: "Customers can spend the store credits from the checkout page". Below the progress bar, the 'Payment Method' section is visible, with 'Check / Money order' selected. A checkbox for 'My billing and shipping address are the same' is also present. The billing address is: Meetanshi Tester, Uniafric House, Koinange St, City Centre, Nairobi, 00100, Kenya, +25420313636. An 'Edit' button is next to the address. A blue 'Place Order' button is located to the right. Below the 'Place Order' button, there is a section for 'Spend Store Credits'. It shows 'Your Store Credit Balance \$500.00' and a text input field containing '299.00'. A red box highlights the input field with the text: "Enter the amount and click 'Spend Store Credit' button to use the credits for product purchase". Below the input field are two buttons: 'Spend Store Credit' and 'Cancel Store Credit'. To the right of the main form, there is an 'Order Summary' section showing: Cart Subtotal \$299.00, Shipping \$5.00, Flat Rate - Fixed, and Order Total \$304.00. Below the order summary, there is a 'Ship To:' section with the address: Meetanshi Tester, 6146 Honey Bluff Parkway, Los Angeles, California 90001, United States, 3123645787. Below the shipping address, there is a 'Shipping Method:' section showing 'Flat Rate - Fixed'.

- **Store Credits Spending Success Message on Checkout Page**

The extension shows success message on spending of store credits from the checkout page. The customer can also cancel the spent store credits by entering the store credits and clicking “Cancel Store Credit” button.



The screenshot displays the checkout page for LUMA. At the top, a progress bar shows 'Shipping' as completed and 'Review & Payments' as the current step. A success message is highlighted with a red box: "Success message after store credits spent on checkout page". Below the progress bar, the 'Payment Method' section is active, showing 'Check / Money order' selected. A checkbox for 'My billing and shipping address are the same' is checked, with the address details for 'Meetanshi Tester' in Nairobi, Kenya. A 'Place Order' button is visible. On the right, the 'Order Summary' table shows a subtotal of \$299.00, shipping of \$5.00, and a store credit of -\$299.00, resulting in an order total of \$5.00. Below the summary, the shipping address is listed as 'Meetanshi Tester' in Los Angeles, California. A 'Shipping Method' section shows 'Flat Rate - Fixed' selected. At the bottom, a green success message is highlighted: "Store credits spent successfully." A red box around this message has an arrow pointing to a 'Cancel Store Credit' button, with a text box stating: "Click 'Cancel Store Credit' button to cancel the spending of store credits".

Success message after store credits spent on checkout page

Shipping Review & Payments

Payment Method

Check / Money order

My billing and shipping address are the same

Meetanshi Tester
Uniafric House, Koinange St, City Centre
Nairobi, 00100
Kenya
[+25420313636](#)
[Edit](#)

[Apply Discount Code](#) ▾

[Spend Store Credits](#) ▲

Your Store Credit Balance **\$201.00**
Applied store credit amount is \$299.00

Store credits spent successfully.

Click "Cancel Store Credit" button to cancel the spending of store credits

[Place Order](#)

Order Summary

Cart Subtotal	\$299.00
Shipping Flat Rate - Fixed	\$5.00
Store Credit	-\$299.00
Order Total	\$5.00

1 Item in Cart ▾

Ship To:

Meetanshi Tester
6146 Honey Bluff Parkway
Los Angeles, California 90001
United States
[3123645787](#)

Shipping Method:

Flat Rate - Fixed

- **Store Credit Spending Details in Customer' My Account**

Once the order is placed successfully using store credit, the store credit spending details can be seen in customer's **My Account** section under the order view of **My Orders** tab.

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

- Address Book
- Account Information

- My Product Reviews
- Newsletter Subscriptions
- Store Credit and Refund

Order # 000000016

PENDING

June 9, 2021 Store credit spending details in customer's My Account section after successful order placement

[Reorder](#) [Print Order](#)

Compare Products

You have no items to compare.

Recently Ordered

Apple Watch

[Add to Cart](#) [View All](#)

My Wish List

You have no items in your wish list.

Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Apple Watch	Apple Watch	\$299.00	Ordered: 1	\$299.00
Subtotal				\$299.00
Shipping & Handling				\$5.00
Store Credit				-\$299.00
Grand Total				\$5.00


Order Information

Shipping Address	Shipping Method	Billing Address	Payment Method
Meetanshi Tester 6146 Honey Bluff Parkway Los Angeles, California, 90001 United States T: 3123645787	Flat Rate - Fixed	Meetanshi Tester Uniafric House, Koinange St, City Centre Nairobi, 00100 Kenya T: +25420313636	Check / Money order

- **Store Credit and Refund Tab under My Account Section**


All the store credits and refund related transactions are saved in customer's **My Account** section under a separate tab name "**Store Credit and Refund**". The tab stores the details like current credits of the customer, transaction history such as transaction ID, date of the transaction, balance change, updated balance, action and message if added.

Welcome, Meetanshi Tester! Store Credit Balance: 201.00 Sign Out



All the store credit and refund transaction history in customer's My Account section

Search entire store here... 🔍



Mpesa Payment **Store Credit**

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

- Address Book
- Account Information

- My Product Reviews
- Newsletter Subscriptions
- Store Credit and Refund**

Store Credit

My Store Credits: \$201.00

Transaction ID	Date	Balance Change	Updated Balance	Action	Message
8	6/9/21	-\$299.00	\$201.00	00000016	
7	6/9/21	-\$1.00	\$500.00	Updated by Admin	Rounding the credits
6	6/9/21	+\$200.00	\$501.00	Updated by Admin	Reward for adding product reviews
5	5/27/21	+\$199.00	\$301.00	00000014	
4	5/27/21	-\$299.00	\$102.00	00000015	
3	5/27/21	-\$199.00	\$401.00	00000014	
2	5/27/21	+\$550.00	\$600.00	Updated by Admin	Loyalty reward
1	5/27/21	+\$50.00	\$50.00	Updated by Admin	on signing up for newsletter

Compare Products

You have no items to compare.

Recently Ordered

Apple Watch

Add to Cart [View All](#)

7. Store Credit Details in Backend

Apart from the customers, the admin can also see the Store Credit spending information of the order from the **Sales > Orders > Order View** section in the backend.

#000000016

Store credit spending details in Sales > Orders > Order view section in the backend

← Back Cancel Send Email Hold Invoice Ship Reorder Edit

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Apple Watch SKU: Apple Watch	Ordered	\$299.00	\$299.00	Ordered 1	\$299.00	\$0.00	0%	\$0.00	\$299.00

Order Total

Notes for this Order

Status: Pending

Comment:

Notify Customer by Email
 Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$299.00
Shipping & Handling	\$5.00
Store Credit	-\$299.00
Grand Total	\$5.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$5.00

- **Store Credit Refund while Generating Credit Memo**

If by any means, the admin has to refund the order, the admin can refund store credits spent on the order while generating credit memo. The admin has to enter the store credits to be refunded.

New Memo

The admin can refund store credits while generating the credit memo from the backend

← Back Reset

Items to Refund

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Apple Watch SKU: Apple Watch	\$299.00	Ordered 1 Invoiced 1	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	\$299.00	\$0.00	\$0.00	\$299.00

Update Qty's

Order Total

Credit Memo Comments

Comment Text:

Refund Totals

Subtotal	\$299.00
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text"/>
Adjustment Fee	<input type="text"/>
Tax	\$0.00
Store Credit	-\$304.00
Grand Total	\$0.00

Append Comments
 Email Copy of Credit Memo

Refund to Store Credit Update Store Credits

The admin can enter the store credits to be refunded

Refund Offline

8. Store Credit Transaction History

The admin can see all the store credit related transactions in the separate backend grid under **Meetanshi Store Credit > Transaction History**. The grid contains the details like customer ID, balance change, current store credit balance, action, and store credit transaction date. The admin can export the store credit transactions in CSV or XML format. Also, he can filter the data of the transaction history.

Transaction History

Search by keyword

9 records found

All the store credits related transactions are saved here with the related details

Filter the store credit transaction history from here

Filters

Default View

Columns

Export

20 per page

Export the store credit transactions in CSV or XML format from here

ID	Customer ID	Balance Change	Current Balance	Action	Date
9	2	+\$304.0000	505.0000	000000016	2021-06-09 13:00:06
8	2	-\$299.0000	201.0000	000000016	2021-06-09 12:52:59
7	2	-\$1.0000	500.0000	Updated by Admin	2021-06-09 12:43:59
6	2	+\$200.0000	501.0000	Updated by Admin	2021-06-09 12:36:13
5	2	+\$199.0000	301.0000	000000014	2021-05-27 10:05:51
4	2	-\$299.0000	102.0000	000000015	2021-05-27 10:04:48
3	2	-\$199.0000	401.0000	000000014	2021-05-27 10:00:02
2	2	+\$550.0000	600.0000	Updated by Admin	2021-05-27 09:53:14
1	2	+\$50.0000	50.0000	Updated by Admin	2021-05-27 09:50:43