InvoiceMe (M2) - User Guide

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Standard Checkout/Order Flow

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Completing Checkout

New InvoiceMe Buyer:
If a buyer is completing checkout but has not yet been approved for credit with **InvoiceMe**, the order status will be "Pending InvoiceMe."
- This status indicates that no preauthorization or charge has been held against the order, and will not be, until the buyer has been approved for credit.

Once approved for credit, the order will follow the standard flow for your configured capture mode.

Capture Modes:

For "Authorize Only" mode:
A preauthorization will be made as part of the checkout completion step. This reserves the funds against the buyer's credit line for 14-days (unless otherwise configured in CaaS) and then will be "captured" (funds finalized) once the order is marked shipped/complete.

For "Direct Charge" mode:
A charge will be made as part of the checkout completion step. The buyer will be charged immediately on successful checkout.

The ID of the preauthorization (**Authorize Only** mode) or the invoice (**Direct Charge** mode) will be attached to the order during this step. All relevant transaction details are visible from the Transactions tab when viewing an order.

Invoicing an Order

Note: This section is not applicable when using the **Direct Charge** configuration.

For **Authorize Only:**
Click the "Invoice" link from the order view screen to charge against a preauthorization and create an invoice for the selected order.

You will be met with the "New Invoice" screen to review the order and submit the invoice.

*IMPORTANT NOTE: Ensure that "Capture Online" remains selected. If you choose "Not Capture" a CaaS invoice **will not** be generated (nor will it be settled or collected via CaaS).*

Press the "Submit Invoice" button when you're ready, and an invoice will be created in CaaS against the preauthorization for this order.

Credit Memo (Refunds/Cancellation)

1. From the order view screen, select "Invoices" from under the "Order View" menu.
2. Select the invoice that will be refunded/cancelled.
3. Press the "Credit Memo" link from the action bar towards the top of the screen.

4. Update the particulars of the refund, the select "Refund" in order to trigger a refund/cancellation for the buyer's CaaS invoice.

- A **Partial Refund** in the credit memo will trigger a partial refund on the CaaS invoice.
- A **Full Refund** in the credit memo will trigger a cancellation of the CaaS Invoice.

Manual Order Creation

Creating an order from the admin panel on behalf of a customer.

Requirements

- Customer must already exist in your Magento 2 store
- Customer must already have completed an application for CaaS and have a status of "Active"

Creating an Order

1. Select "Customers > All Customers" from the left menu, then select the customer you would like to create an order for.
2. Press the "Create Order" link from the top menu.
3. Populate the details of the order as you would for any other order.
4. Under the "Payment Method" section, select "InvoiceMe" as the payment method.

Payment & Shipping Information

Payment Method

○ Check / Money order
● InvoiceMe

Purchase Order Number

STOCK-PURCHASE-0309

Notes

Placing an order on behalf of the customer (at their request)

5. Add the Purchase Order Number and any notes to display on the invoice as required.
6. Press "Submit Order" when complete.

View Customer CaaS Status

You can view a customer's current CaaS status by navigating to their profile and clicking the "InvoiceMe" tab.

Business Name	The customer's business name as per their CaaS application
Status	The customer's application status – Active means they are ready to transact on credit
Buyer ID (first 8 characters)	The first 8 characters of the customer's ID in CaaS
Client Reference ID	A unique reference number in the Magento store that links the customer in Magento to the customer in CaaS.
Currency	The currency that the customer's credit line is in.
Credit Approved	The total credit line the customer has been approved for (or applied for)

Credit Balance	The customer's outstanding invoice total
Credit Preauthorized	The customer's current preauthorization total

Customer User Guide

Onboarding

To use the **InvoiceMe** payment method, the customer will be required to submit a credit application while logged into their Magento store buyer account.

1. Once logged in, click the "Welcome" text in the header, then select "My Account."
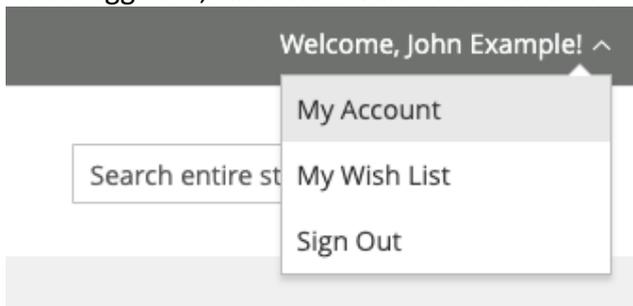
2. From there, click the "InvoiceMe" link from the left menu.
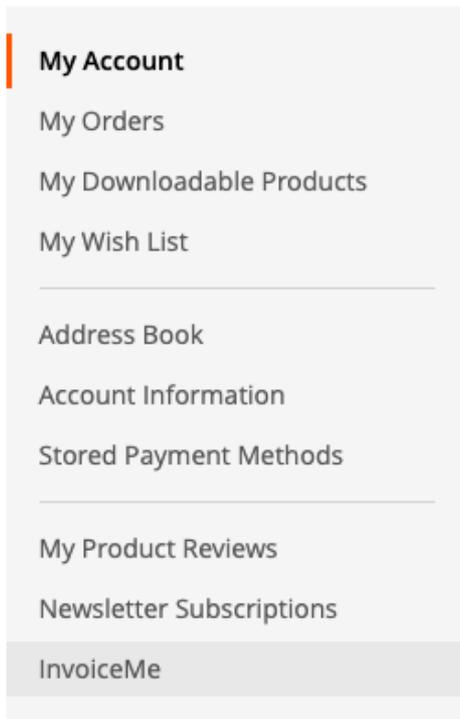
3. The buyer will be met with the following page describing the benefits of **InvoiceMe**, how it works, and the option to "Apply Now.
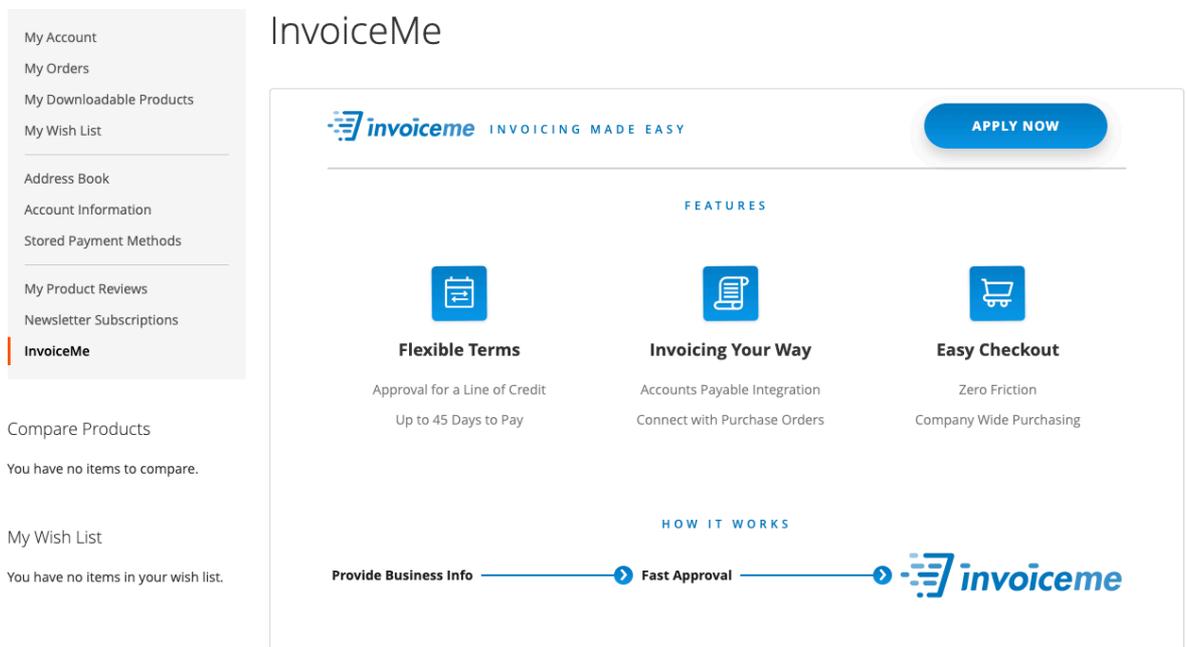
4. Click the "Apply Now" button to redirect you to the credit application form.
5. Fill out the application form and submit it.
6. You will receive an email with a title similar to "Vortex Demo Program Application Received!" immediately after submitting the application.
7. Shortly after, you will receive an additional email titled similar to "ACTION REQUIRED: Your Application for Vortex Demo is Approved – Just One More Step!"

The email will look like the following:
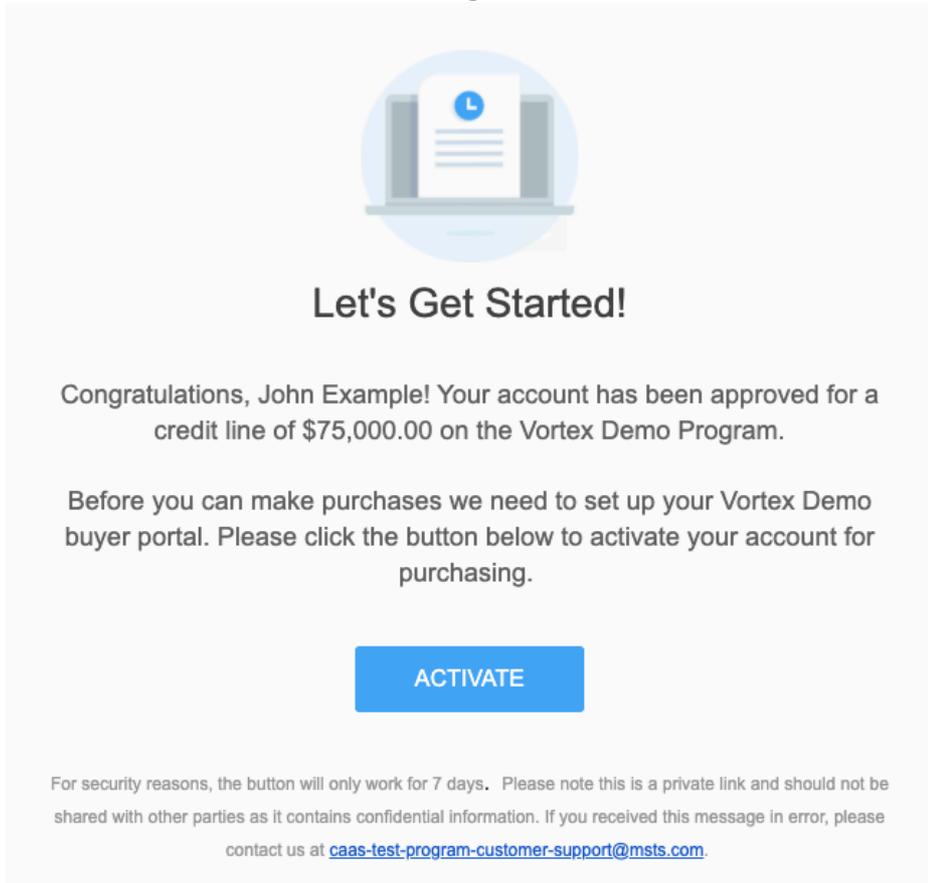
8. Press the "Activate" button to assign a password to your account and fill out any additional details required.
9. You are now ready to use **InvoiceMe**!

Using InvoiceMe at Checkout

1. Once again, navigate to the "InvoiceMe" tab on the "My Account" page. You will now see your **InvoiceMe** details.

This means that your account is ready to make purchases on credit.
2. Continue to add one or more items to your cart then proceed to checkout.

3. Once on the payments step, you will be given the choice of using "InvoiceMe" as the payment method, as seen below:

Payment Method

◯ Check / Money order

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🔵 InvoiceMe

☑ My billing and shipping address are the same

Name Example

123 Road St

Melbourne, Victoria 3000

Australia

+61400000000

Purchase Order Number

[   ]

Notes

[   ]

Place Order

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Apply Discount Code ⌄

4. Optionally, you may enter a Purchase Order Number and/or Notes for this order. These will be displayed on the invoice you receive after purchase.
5. Clicking "Place Order" will progress the order and you will receive a PDF copy of the invoice directly to your email. Additionally, a copy of the invoice will also be available from the buyer portal along with all other invoices and payment details.

Testing Guide (Sandbox Mode)

Once you have **InvoiceMe** setup in your Magento 2 store and it's set to **sandbox mode**, we recommend you test the process end-to-end in your own CaaS sandbox/staging store to ensure everything has been setup correctly.

Throughout the testing instructions, the "InvoiceMe" payment will refer to payment title you configured during the extension setup. If you chose something other than **InvoiceMe** for the payment title, please check for that instead.

Test 1: Guest Checkout

*Only applicable if **Guest Checkout** is enabled for your store.*

As a guest user (not logged in on the storefront), add one or more items to your cart then continue to the checkout.

Fill out all of the details required for email, billing details, and shipping details.

In the payments section, you should see **InvoiceMe** as a payment method.

POSITIVE RESULT:
- Clicking the **InvoiceMe** payment method will display an inline message saying that **InvoiceMe** is only available to registered users
- Unable to proceed with placing order while the **InvoiceMe** payment method is selected

Test 2: Registered User Checkout (no InvoiceMe account)

As a registered user (on the storefront), add one or more items to your cart then continue to the checkout.

Fill out all of the details required for billing details and shipping details (or prefill using the registered user's details).

In the payments section, you should see **InvoiceMe** as a payment method.

POSITIVE RESULT:
- Clicking the **InvoiceMe** payment method will display a message saying that the user is not yet registered for **InvoiceMe** but will be redirected to the credit application once the order has been placed.
- Able to proceed with placing the order while the **InvoiceMe** payment method is selected
- Redirected to the CaaS application form

NOTES:
- At this point you should complete the application process so that you will have an active **InvoiceMe** account to use for the following tests.
- **IMPORTANT: Please ensure you provide a valid email address in the application as you will be sent a verification email to activate your account.**

EXAMPLE VIEW:

VORTEX

Search entire store here...

1

✓ ─────── ✓
Shipping   **Review & Payments**

Payment Method

○ Check / Money order

───────────────────────────

● InvoiceMe

☑ My billing and shipping address are the same

Name Example
123 Fake Street
Fakeville, California 90210
United States
+61400000000

You are not yet a registered InvoiceMe user. You will be redirected to the InvoiceMe credit application form after placing this order. Your order will be processed after approval of your InvoiceMe credit application and InvoiceMe user account is created.

Place Order

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Apply Discount Code ⌄

Order Summary

Cart Subtotal	$45.00
Shipping Flat Rate - Fixed	$5.00
Order Total	**$50.00**

1 Item in Cart ⌄

Ship To: ✎

Name Example
123 Fake Street
Fakeville, California 90210
United States
+61400000000

Shipping Method: ✎

Flat Rate - Fixed

Test 3: Registered User Checkout (with active InvoiceMe account)

As a registered user on the storefront (should be available from **Test 2**) that has already completed an **InvoiceMe** application and created an account within the CaaS portal, add multiple items to your cart continue to the checkout.

Fill out all of the details required for billing details and shipping details (or prefill using the registered user's details).

In the payments section, you should see **InvoiceMe** as a payment method.

POSITIVE RESULT:
- Clicking the **InvoiceMe** payment method will display your credit limit, credit balance, and credit preauthorized values.
- You should be able to proceed with placing the order while the **InvoiceMe** payment method is selected

NOTES:
- Take note of the order number given as you can use this order as part of the following steps.

EXAMPLE VIEW:

Test 4: View Transaction Reference ID in Admin Order Screen

As a Magento admin, navigate to a newly placed order that used the **InvoiceMe** payment method.

Navigate to the Transactions tab of the order.

POSITIVE RESULT:
- There should be a row with Payment Method name of "InvoiceMe" and a transaction type of "Authorization."
- There should be a Transaction ID listed in the same row, this should be in the UUID format of:
  `aaaabbbb-cccc-dddd-eeee-ffff11112222`

Test 5: Invoice Order in Admin Order Screen

As a Magento admin, navigate to a newly placed order that used the **InvoiceMe** payment method.

Select "Invoice" link from the top menu on the order screen, then submit the invoice.

Navigate to the Transactions tab of the order.

POSITIVE RESULT:
- There should be a row with Payment Method name of "InvoiceMe" and a transaction type of "Capture."
- There should be a Transaction ID listed in the same row, this should be in the UUID format of:
  `aaaabbbb-cccc-dddd-eeee-ffff11112222`
- There should also be a Parent Transaction ID listed (in the UUID format described above) that relates to the Transaction ID of the earlier Authorization.
- The buyer should receive an invoice that has a grand total matching that of the order in Magento 2.
  - The line items within the invoice should closely match the details of the Magento 2 order.
  - The email will go to the buyer's registered **InvoiceMe** email address. The invoice ID should match the Transaction ID listed in Magento 2.

Test 6: Partial Refund Order in Admin Order Screen

As a Magento admin, navigate to an existing order that used the **InvoiceMe** payment method and has a submitted invoice.

Navigate to the "Invoices" tab on the order, then select the invoice to do a partial refund against. On the invoice screen, press the "Credit Memo" link in the top menu bar.

Adjust the values of the credit memo so that you will not be refunding the entire order amount, then finalize the credit memo.

POSITIVE RESULT:
- There should be a row with Payment Method name of "InvoiceMe" and a transaction type of "Refund."
- There should be a Transaction ID listed in the same row, this should be in the UUID format of:
  `aaaabbbb-cccc-dddd-eeee-ffff11112222`
- There should also be a Parent Transaction ID listed (in the UUID format described above) that relates to the Transaction ID of the earlier Capture.
- The buyer should receive an invoice that has a new grand total matching that of the order in Magento 2.
  - The line items within the invoice should closely match the details of the Magento 2 order.
  - The email will go to the buyer's registered **InvoiceMe** email address. The invoice ID should match the original Transaction ID listed in Magento 2 for the earlier Capture.

Test 7: Fully Refund Order in Admin Order Screen

As a Magento admin, navigate to an existing order that used the **InvoiceMe** payment method. Ensure that the order has an invoice submitted that can be refunded against.

Navigate to the "Invoices" tab on the order, then select the invoice to do a partial refund against. On the invoice screen, press the "Credit Memo" link in the top menu bar.

Adjust the values of the credit memo so that the entire order value will be refunded, then finalize the credit memo.

POSITIVE RESULT:
- There should be a row with Payment Method name of "InvoiceMe" and a transaction type of "Refund."
- There should be a Transaction ID listed in the same row, this should be in the UUID format of:
  `aaaabbbb-cccc-dddd-eeee-ffff11112222`
- There should also be a Parent Transaction ID listed (in the UUID format described above) that relates to the Transaction ID of the earlier Capture.
- The buyer should receive an updated invoice with "Cancelled" across it.

Additional Testing Notes

Placing orders using **InvoiceMe** should function correctly using any combination of store promotions, store credit used, store coupons, discounts, refunds, etc.

We recommend testing a handful of common scenarios that occur in your business-as-usual activity to ensure that they are correctly handled. These might include:
- applying multiple partial refunds to an individual order
- invoicing an order that had a promotional discount and a coupon used
- manually placing an order on behalf of a customer
- etc.