

# *SafeCharge*

Demand more

## Magento 2 Guide

January 2020

Supported Magento version: 2.3

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## 1) Extensions Installation Guide

<https://devdocs.magento.com/guides/v2.3/cloud/howtos/install-components.html#install>

## 2) Demo Site

Demo site: <https://magento-demo.safecharge.com/men-shirts.html>

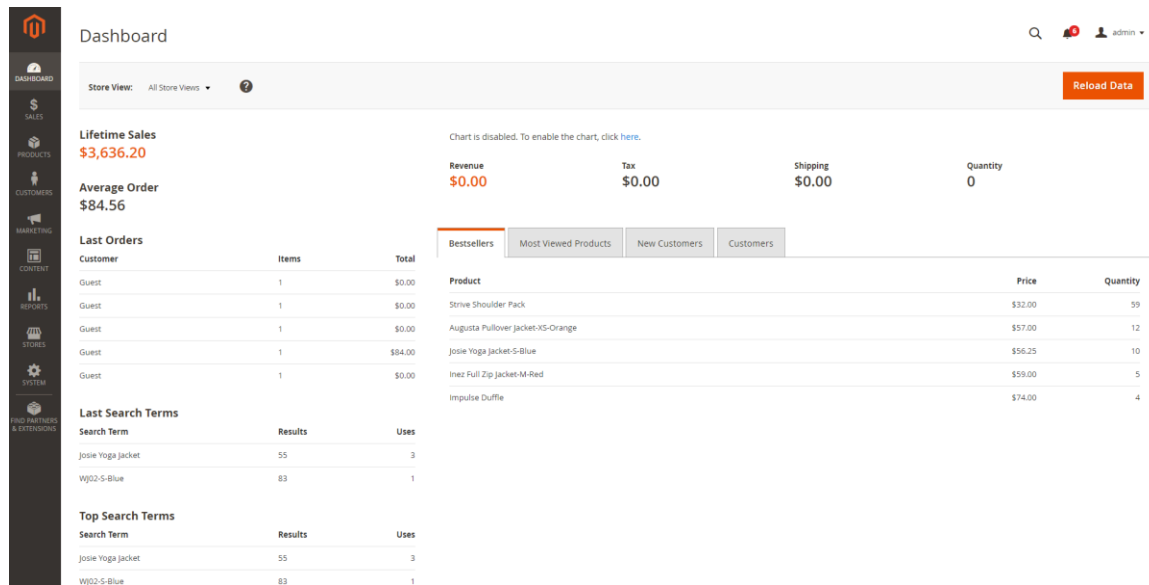
## 3) Magento 2 Configuration Guide

### a) Logging in to your Magento 2 Admin Panel

Once your account has been set up, you can access the Plugin through your Internet browser.

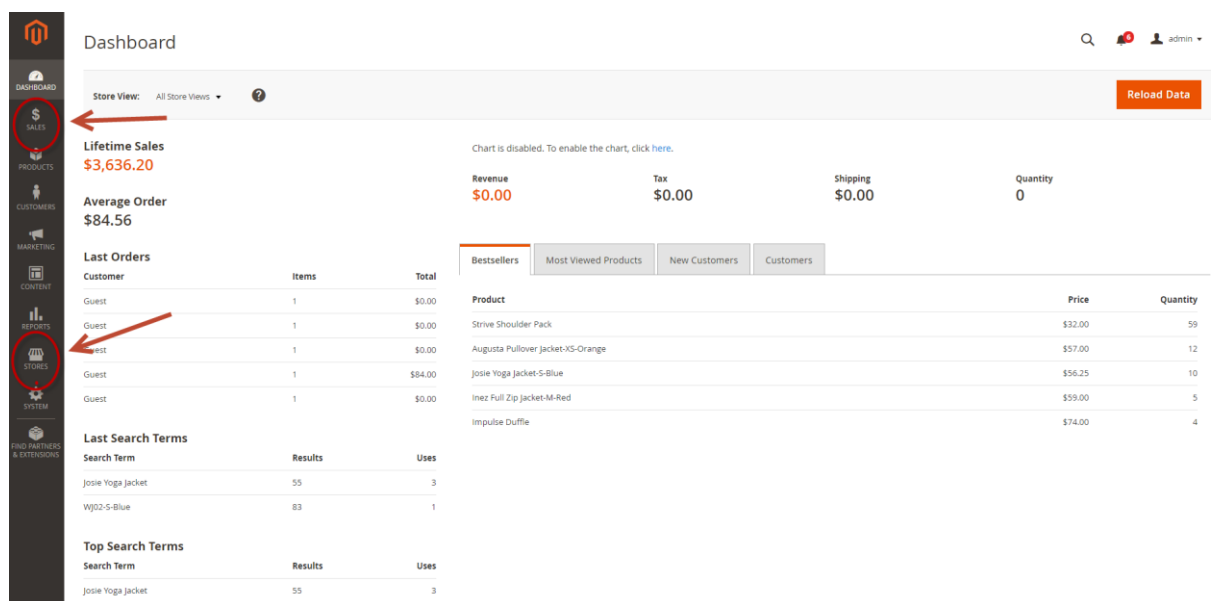


Enter your Username and Password and click Sign in and the Dashboard screen appears.



## b) Navigating the Plugin

The plugin contains the functionality that will be in use in your account. The 2 main functionalities that will serve your needs are “Stores” and “Sales” which are in the column on the left side of the page.



### c) Configuration

- i) From the **Stores** section you can manage your account details and set the credentials that were given to you by the SafeCharge Integration Team.
- Click **Stores** and then **Configuration** and the Configuration Page appears.

The screenshot shows the 'Stores' configuration page. The left sidebar has a 'Stores' menu with 'Configuration' highlighted. The main content area displays a 'Stores' configuration page with a 'Reload Data' button, a chart area, and a table of products.

Revenue	Tax	Shipping	Quantity
\$0.00	\$0.00	\$0.00	0

Product	Price	Quantity
Strive Shoulder Pack	\$32.00	59
Augusta Pullover Jacket-XS-Orange	\$57.00	12
Josie Yoga Jacket-S-Blue	\$56.25	10
Inez Full Zip Jacket-M-Red	\$59.00	5
Impulse Duffie	\$74.00	4

- ii) From the tabs on the left, select **SALES** and the Sales dropdown menu appears.

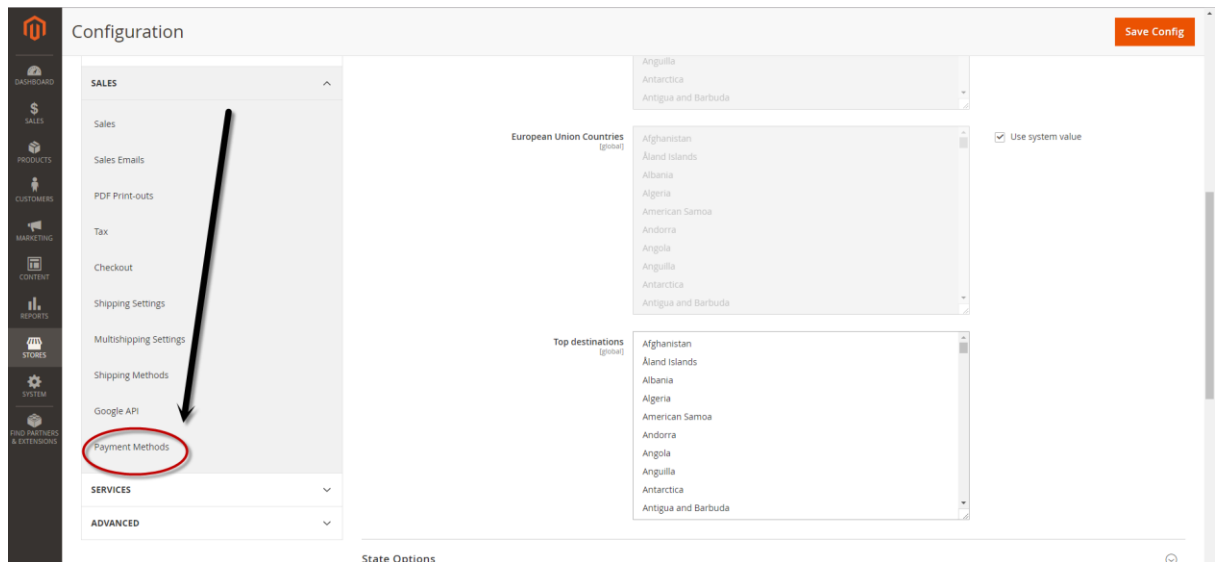
The screenshot shows the 'Stores' configuration page with the 'SALES' option highlighted in the left sidebar. The main content area displays the 'Country Options' configuration page.

Default Country	Use system value
United States	<input checked="" type="checkbox"/>

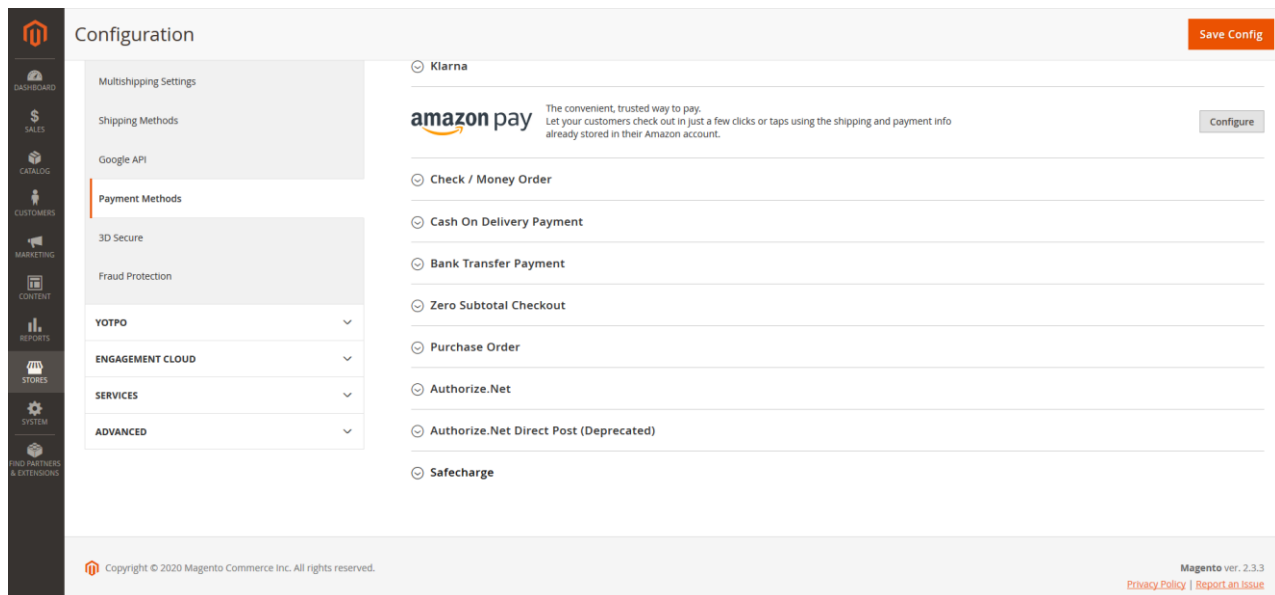
Allow Countries	Use system value
Alghanistan	<input checked="" type="checkbox"/>
Åland Islands	<input checked="" type="checkbox"/>
Albania	<input checked="" type="checkbox"/>
Algeria	<input checked="" type="checkbox"/>
American Samoa	<input checked="" type="checkbox"/>
Andorra	<input checked="" type="checkbox"/>
Angola	<input checked="" type="checkbox"/>
Anguilla	<input checked="" type="checkbox"/>
Antarctica	<input checked="" type="checkbox"/>
Antigua and Barbuda	<input checked="" type="checkbox"/>

Zip/Postal Code is Optional for	Use system value
Alghanistan	<input checked="" type="checkbox"/>
Åland Islands	<input checked="" type="checkbox"/>
Albania	<input checked="" type="checkbox"/>
Algeria	<input checked="" type="checkbox"/>
American Samoa	<input checked="" type="checkbox"/>
Andorra	<input checked="" type="checkbox"/>
Angola	<input checked="" type="checkbox"/>
Anguilla	<input checked="" type="checkbox"/>
Antarctica	<input checked="" type="checkbox"/>
Antigua and Barbuda	<input checked="" type="checkbox"/>

- iii) From the **SALES** dropdown menu, select **Payment Methods** and the available methods are displayed on the right.



iv) From the list of payment method there are to options under SafeCharge.



v) Configuration allows you to implement the account credentials that were provided by the SafeCharge Integration team. You can toggle between the Test and Production using the Mode button. You can toggle between Settle and Auth-Settle using the Payment Action dropdown menu Press the Save Config button to save your changes.

<b>Enabled</b> <small>[website]</small>	<input type="text" value="Yes"/>	<input type="checkbox"/>	Use system value
<b>Title</b> <small>[website]</small>	<input type="text" value="Safecharge"/>	<input type="checkbox"/>	Use system value
<b>Mode</b> <small>[website]</small>	<input type="text" value="Sandbox"/>		
<b>Merchant Hash</b> <small>[website]</small>	<input type="text" value="SHA 256"/>		
<b>Payment Action</b> <small>[website]</small>	<input type="text" value="Authorize"/>	<input type="checkbox"/>	Use system value
<b>Merchant ID</b> <small>[website]</small>	<input type="text"/>		Value provided by Safecharge.
<b>Merchant Site Id</b> <small>[website]</small>	<input type="text"/>		Value provided by Safecharge.
<b>Merchant Secret Key</b> <small>[website]</small>	<input type="text"/>		Value provided by Safecharge.
<b>Sandbox Merchant ID</b> <small>[website]</small>	<input type="text" value="....."/>		Value provided by Safecharge.
<b>Sandbox Merchant Site Id</b> <small>[website]</small>	<input type="text" value="184283"/>		Value provided by Safecharge.
<b>Sandbox Merchant Secret Key</b> <small>[website]</small>	<input type="text" value="....."/>		Value provided by Safecharge.
<b>Save Order before Success page</b> <small>[website]</small>	<input type="text" value="No"/>	<input type="checkbox"/>	Use system value
<b>Debug</b> <small>[website]</small>	<input type="text" value="Yes"/>		
<b>Minimum Order Total</b> <small>[website]</small>	<input type="text"/>		
<b>Maximum Order Total</b> <small>[website]</small>	<input type="text"/>		
<b>Sort Order</b> <small>[website]</small>	<input type="text"/>		
<b>Payment from Applicable Countries</b> <small>[website]</small>	<input type="text" value="All Allowed Countries"/>	<input type="checkbox"/>	Use system value
<b>Payment from Specific Countries</b> <small>[website]</small>	<div> Afghanistan  Åland Islands  Albania  Algeria  American Samoa  Andorra  Angola  Anguilla  Antarctica  Antigua &amp; Barbuda </div>		

#### d) Transaction Reports

From the plugin, you can find Sale request that were sent from your account, as well as settle, credit, and void transactions.

#### To view transaction details:

- From the **Sales** section you can view and manage your transactions.  
Click **Sales** and then **Orders** and the Orders Page appears.

- To view the transaction details, Click View in the Action column of the desired transactions and the Order & Account Information page appears.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Total (Purchased)	Status	Action
000000049	Main Website Main Website Store Default Store View	Feb 27, 2018, 11:07:10 AM	Yossi SafeCharge	Yossi SafeCharge	\$61.25	\$61.25	Closed	<a href="#">View</a>
000000048	Main Website Main Website Store Default Store View	Jan 10, 2018, 13:56:10 PM	fdasd sdfasd	fdasd sdfasd	\$160.00	\$160.00	Closed	<a href="#">View</a>
000000047	Main Website Main Website Store Default Store View	Jan 10, 2018, 13:14:18 PM	fdasd sdfasd	fdasd sdfasd	\$33.00	\$33.00	Closed	<a href="#">View</a>
000000046	Main Website Main Website Store Default Store View	Jan 10, 2018, 13:10:40 PM	sdfds dftbfg	sdfds dftbfg	\$94.00	\$94.00	SC Auth	<a href="#">View</a>
000000045	Main Website Main Website Store Default Store View	Jan 10, 2018, 12:58:47 PM	sdfa dsfvads	sdfa dsfvads	\$220.00	\$220.00	Closed	<a href="#">View</a>
000000044	Main Website Main Website Store Default Store View	Jan 10, 2018, 12:48:35 PM	sdfsadf sdvadiv	sdfsadf sdvadiv	\$124.00	\$124.00	SC Settled	<a href="#">View</a>
000000043	Main Website Main Website Store Default Store View	Jan 10, 2018, 11:56:00 AM	sadfasd sdfasd	sadfasd sdfasd	\$75.00	\$75.00	SC Settled	<a href="#">View</a>
000000042	Main Website Main Website Store Default Store View	Jan 10, 2018, 11:39:02 AM	Qweer Sedfgg	Qweer Sedfgg	\$54.00	\$54.00	SC Settled	<a href="#">View</a>
000000041	Main Website Main Website Store Default Store View	Jan 10, 2018, 11:09:26 AM	Wert Errt	Wert Errt	\$69.00	\$69.00	Closed	<a href="#">View</a>

- In this page, you can find the order details such as the customer information, the item that was ordered, and the amount paid.



## e) Create an invoice

- (1) To determine whether a specific transaction can be settled, credited or voided; from the ORDER VIEW tab on the left, click Invoices and the list of available transactions appear.

#000000049

← Back Send Email Reorder

**ORDER VIEW**

Information  
Invoices  
Credit Memos  
Shipments  
Comments History  
Transactions

**Order & Account Information**

Order # 000000049 (The order confirmation email was sent)

Order Date: Feb 27, 2018, 11:07:10 AM  
Order Status: Closed  
Purchased From: Main Website  
Placed from IP: 212.25.122.125

**Account Information**

Customer Name: Guest  
Email: yossi@safecharge.com  
Customer Group: NOT LOGGED IN

**Address Information**

**Billing Address** Edit  
Yossi SafeCharge  
Asherman  
test, 41541  
Israel  
T: +972545386662

**Shipping Address** Edit  
Yossi SafeCharge  
Asherman  
test, 41541  
Israel  
T: +972545386662

**Payment & Shipping Method**

**Payment Information**  
Safecharge

**Shipping & Handling Information**  
Flat Rate - Fixed \$5.00

- (2) Click View in the Action column of the desired transactions and the order invoice appears.

#000000050

← Back Send Email Credit Memo Hold Ship Reorder

**ORDER VIEW**

Information  
Invoices  
Credit Memos  
Shipments  
Comments History  
Transactions

Search by keyword

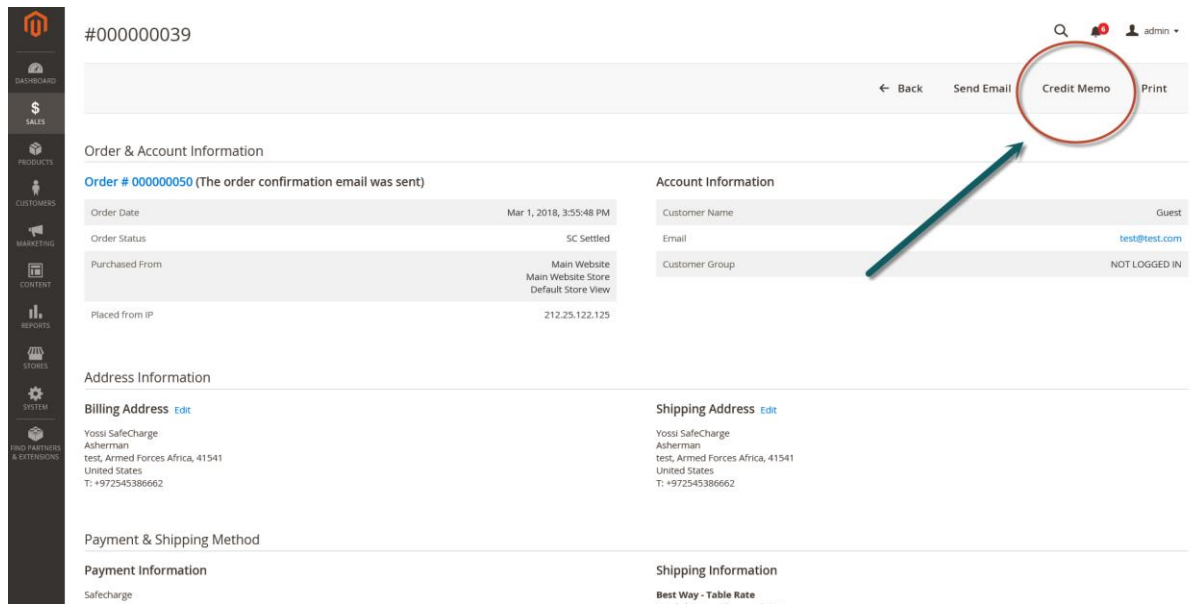
Actions 1 records found

Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
000000039	Mar 1, 2018 3:55:48 PM	000000050	Mar 1, 2018 3:55:48 PM		Paid	\$155.00	View

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## f) Perform a refund:

- i) From the invoice, click the Credit Memo button in upper right corner of the invoice and the New Memo window appears.



#000000039

← Back Send Email **Credit Memo** Print

**Order & Account Information**

Order # 000000050 (The order confirmation email was sent)

Order Date	Mar 1, 2018, 3:55:48 PM	Customer Name	Guest
Order Status	SC Settled	Email	test@test.com
Purchased From	Main Website Main Website Store Default Store View	Customer Group	NOT LOGGED IN
Placed from IP	212.25.122.125		

**Address Information**

**Billing Address** [Edit](#)

Yossi SafeCharge  
Asherman  
test, Armed Forces Africa, 41541  
United States  
T: +972545386662

**Shipping Address** [Edit](#)

Yossi SafeCharge  
Asherman  
test, Armed Forces Africa, 41541  
United States  
T: +972545386662

**Payment & Shipping Method**

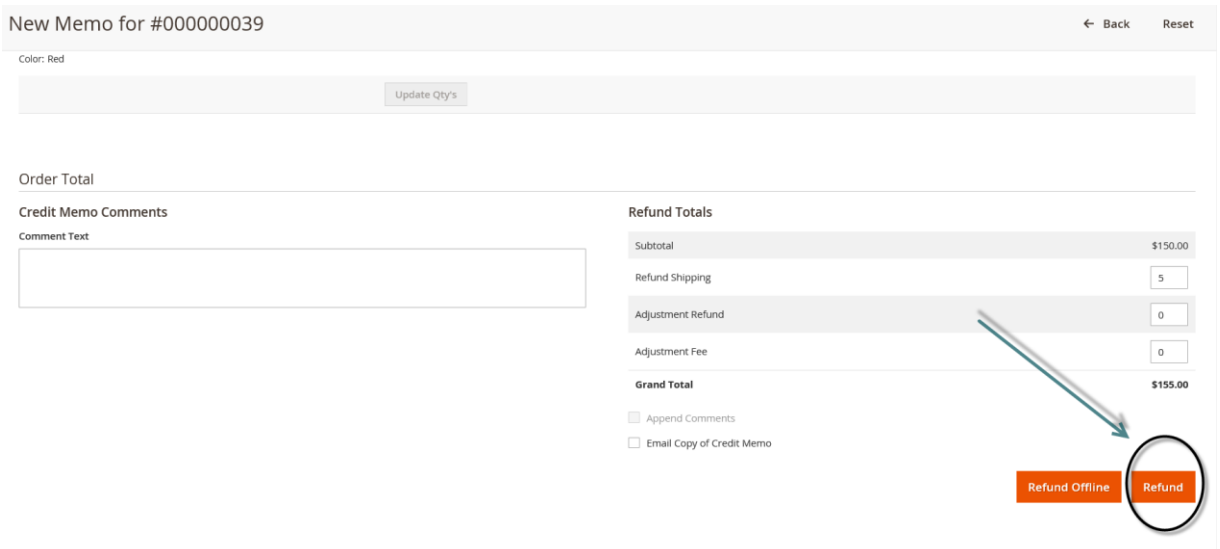
**Payment Information**

Safecharge

**Shipping Information**

Best Way - Table Rate

- ii) Enter the desired amounts the Refund Totals section and click the Refund button and the refund is applied.



New Memo for #000000039

← Back Reset

Color: Red

[Update Qty's](#)

**Order Total**

**Credit Memo Comments**

Comment Text

**Refund Totals**

Subtotal	\$150.00
Refund Shipping	5
Adjustment Refund	0
Adjustment Fee	0
<b>Grand Total</b>	<b>\$155.00</b>

☐ Append Comments

☐ Email Copy of Credit Memo

[Refund Offline](#) **Refund**

- g) Perform a partial refund by changing the quantity

From the New Memo window adjust the quantity of goods in the **Qty of Refund** box (step 1) and click **Update Qty's** (step 2) and then click **Refund** (step 3)

and the refund is applied.

New Memo for #000000039 ← Back Reset

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Stellar Solar Jacket SKU: WJ01-M-Red Size: M Color: Red	\$75.00	Ordered 2 Invoiced 2	<input type="checkbox"/>	<input type="text" value="2"/>	\$150.00	\$0.00	\$0.00	\$150.00

Order Total

Credit Memo Comments

Comment Text

Refund Totals

Subtotal	\$150.00
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
<b>Grand Total</b>	<b>\$155.00</b>

☐ Append Comments  
☐ Email Copy of Credit Memo

h) Settle a transaction:

- i) From the Order list select **View** from the Action of the desired transaction whose status is listed as 'SC Auth' and the Order & Account Information window appears.

#### Orders

Search by keyword Filters Default View Columns Export

Actions 50 records found 20 per page 1 of 3

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000051	Main Website Main Website Store Default Store View	Mar 04, 2018, 10:47:14 AM	Yossi SafeCharge	Yossi SafeCharge	\$108.00	\$108.00	SC Auth	<a href="#">View</a>
000000050	Main Website Main Website Store Default Store View	Mar 01, 2018, 15:55:48 PM	Yossi SafeCharge	Yossi SafeCharge	\$155.00	\$155.00	SC Settled	<a href="#">View</a>
000000049	Main Website Main Website Store Default Store View	Feb 27, 2018, 11:07:10 AM	Yossi SafeCharge	Yossi SafeCharge	\$61.25	\$61.25	Closed	<a href="#">View</a>
000000048	Main Website Main Website Store Default Store View	Jan 10, 2018, 13:56:10 PM	fdasd sdfasd	fdasd sdfasd	\$160.00	\$160.00	Closed	<a href="#">View</a>
000000047	Main Website Main Website Store Default Store View	Jan 10, 2018, 13:14:18 PM	fdasd sdfasd	fdasd sdfasd	\$33.00	\$33.00	Closed	<a href="#">View</a>
000000046	Main Website Main Website Store Default Store View	Jan 10, 2018, 13:10:40 PM	sdfds dfbfgb	sdfds dfbfgb	\$94.00	\$94.00	SC Auth	<a href="#">View</a>

- ii) You can void the transaction by clicking the Void (Red) tab or settle it by clicking the Invoice tab (Green) and the New Invoice window appears.

#000000051

Search, Notifications, User: admin

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

Order & Account Information

Order # 000000051 (The order confirmation email is not sent)

Order Date: Mar 4, 2018, 10:47:14 AM

Order Status: SC Auth

Purchased From: Main Website  
Main Website Store  
Default Store View

Placed from IP: 212.25.122.125

Account Information

Customer Name: Guest

Email: test@test.com

Customer Group: NOT LOGGED IN

Address Information

Billing Address [Edit](#)

Yossi SafeCharge  
Sarona  
Tel Aviv, Arkansas, 41541  
United States  
T: 97416161

Shipping Address [Edit](#)

Yossi SafeCharge  
Sarona  
Tel Aviv, Arkansas, 41541  
United States  
T: 97416161

Payment & Shipping Method

Payment Information

Shipping & Handling Information

Back

Cancel

Send Email

Void

Hold

Invoice

Ship

Reorder

Edit

Cancel the sale request by Voiding the initial Auth transaction

By clicking it, you can settle the initial Auth transaction.

- iii) From the New Invoice page you can adjust the quantity of goods in the Qty of Refund column. Click the Submit Invoice button and the invoice is updated.

New Invoice

Back, Reset

The order was placed using USD.

Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Hyperion Elements Jacket SKU: MJ02-4A-Orange Size: M Color: Orange	\$51.00	Ordered 1	1	\$51.00	\$0.00	\$0.00	\$51.00
Kenobi Trail Jacket SKU: MJ04-M-Blue Size: M Color: Blue	\$47.00	Ordered 1	1	\$47.00	\$0.00	\$0.00	\$47.00

Update Qty's

Order Total

Invoice History

Invoice Comments

Invoice Totals

Subtotal	\$38.00
Shipping & Handling	\$10.00
<b>Grand Total</b>	<b>\$108.00</b>

Amount

Capture Online

Append Comments

Email Copy of Invoice

Submit Invoice

you can perform partial settle, by changing the quantity.