



# **Store Credit**

User Manual

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# 1 Extension features

Here's what Store Credit can do out-of-the-box:

- Add or subtract store credits to/from customer accounts
- Get automatic refunds to go directly to the store credit
- Get access to full transaction history
- Allow customers to pay with their store credits

All Aitoc extensions can be customized to fit particular business needs. If you have questions about any customization, please drop a message at [support@aitoc.com](mailto:support@aitoc.com)<sup>1</sup>

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<sup>1</sup> <mailto:support@aitoc.com>

## 2 Installation

To install the extension to your Magento 2 store, please follow these steps:

- Unzip and paste the extension file into your root Magento folder.
- Connect to your server by SSH.
- Go to your Magento root folder.
- To install the extension, perform this command:

```
php bin/magento setup:upgrade
```

- Reset JavaScript cache by removing all folders in pub/static:

```
_requirejs; adminhtml; frontend.
```

- To switch the extension on/off, perform these commands:

```
php bin/magento module:enable Aitoc_StoreCredit  
php bin/magento module:disable Aitoc_StoreCredit
```

You can activate/deactivate several Aitoc extensions at once by specifying their names separated by space in the command.

To install the extension via composer please [read this guide](https://www.aitoc.com/docs/guides/composer.html)<sup>2</sup>.

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<sup>2</sup> <https://www.aitoc.com/docs/guides/composer.html>

### 3 Initial setup

Go to Stores → Configuration → Aitoc Extensions → Store Credit to configure global settings.

The screenshot shows the Magento Configuration interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and includes a search icon, a notification bell with a red '1', and a user profile for 'admin'. Below this is a 'Store View' dropdown set to 'Default Config' with a help icon, and a prominent orange 'Save Config' button. A left-hand menu lists various configuration categories: GENERAL, CATALOG, SECURITY, CUSTOMERS, SALES, ENGAGEMENT CLOUD, SERVICES, and ADVANCED. The 'AITOC EXTENSIONS' category is expanded, showing 'Information & Marketplace' and 'General'. The 'General' section is active, displaying the 'Shopping Cart Information Text' field. The text in this field is: 'You can spend <b>{available\_balance}</b> from your store credit with this purchase'. A tooltip box highlights this text, and a note below it states: 'This will appear in the shopping cart totals section, use {available\_balance}'.

Here you set the message that appears in the shopping cart and shows available store credits to the customer.

## 4 Managing store credit

Go to Customers → All Customers to see the full list of all customers and their credits. Edit customer to manage his / her credit balance.

- DASHBOARD
- SALES
- CATALOG
- CUSTOMERS**
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS
- SALES
- CATALOG
- CUSTOMERS**
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

## Customers

admin

Add New Customer

Search by keyword

Filters

Default View

Columns

Export

Actions

1 records found

20 per page

1 of 1

	ID ↓	Name	Store Credit	Email	Group	Phone	ZIP	Country	State/Province	Customer Since
<input type="checkbox"/>	1	Veronica Costello	\$300.00	roni_cost@example.com	General	(555) 229-3326	49628-7978	United States	Michigan	Sep 5, 2019 9:15:08 AM

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Magento ver. 2.3.2

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### CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Aitoc Store Credit**

### Balance Information

Current Balance \$300.00

Balance Change \*   
Enter positive to add, negative to subtract

Comment   
Comment for customer

Update Balance

Search

Reset Filter

1 records found

20 per page

1 of 1

Transaction Id ↑	Value	Comment	Date
	From <input type="text"/> To <input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>
1	300.00		Sep 5, 2019, 2:42:30 PM

To add more credits, enter a positive value to the field "Balance Change". To subtract credits, enter a negative value to said field (put "-"). Click the "Update Balance" button.

You can leave comments to each balance update for further reference if needed. All credit update history for this particular customer is available on the same tab.

**i** You may also enter a value with a decimal number but it will be rounded down to the lower value. For example, \$386.86 will be \$386 once you check on the customer details.

Go to Sales → Orders tab to see all orders with low / zero Grand total. If you notice something like that - it means this order has been paid with store credits. You can check that by opening the order and seeing the Order Totals section.

The screenshot displays the order management interface. At the top, there is a navigation bar with buttons: Back, Cancel, Send Email, Hold, Invoice, Ship, Reorder, and Edit. Below this, the order details are shown, including the color (White). The main section is titled "Order Total" and is divided into two columns: "Notes for this Order" and "Order Totals".

**Notes for this Order:**

- Status: Pending (dropdown menu)
- Comment: A text input field.
- Options:
  - Notify Customer by Email
  - Visible on Storefront
- Submit Comment button.

**Order Totals:**


Subtotal	\$34.00
Shipping & Handling	\$5.00
Tax	\$2.81
<b>Grand Total</b>	<b>\$41.81</b>
<b>Total Paid</b>	<b>\$0.00</b>
<b>Total Refunded</b>	<b>\$0.00</b>
<b>Paid with Store Credit</b>	<b>-\$41.81</b>
<b>Total Due</b>	<b>\$0.00</b>


**i** You can use store credit to pay for the orders that you manually create for the customers in the admin panel. If you indicate a value larger than the store credit balance, an error message will appear "Store credit balance is not sufficient".





## 5 Refund with Store Credit


To refund with store credits instead of refund transactions, go to Orders and choose the order which needs a refund. Create a credit memo and select "Refund with Store credit" option.





 DASHBOARD


 SALES


 CATALOG


 CUSTOMERS


 MARKETING

 CONTENT

 REPORTS

 STORES

 SYSTEM

 FIND PARTNERS & EXTENSIONS

New Memo
← Back    Reset

Order Total

---

Credit Memo Comments

Comment Text

**Refund Totals**

Subtotal	\$22.00
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Refund with Store credit	<input type="text" value="29"/>
Tax	\$1.82
<b>Grand Total</b>	<b>\$28.82</b>

Append Comments

Email Copy of Credit Memo

Refund Offline

You can choose to indicate the whole amount or a portion of the refund total to the customer's store credit balance. Click on the Refund Offline button to complete the Refund request.

## 6 Transactions tab

Go to Marketing → Aitoc Store Credit → Transactions tab to see all store transactions where store credit is involved.

The screenshot displays the 'Transactions' tab in the Magento Admin interface. The page title is 'Transactions'. On the right side, there are search, notification, and user profile icons. Below the title, there are controls for filters, default view, columns, and export. A message indicates '7 records found'. Below this, there is a pagination control showing '20 per page' and '1 of 1' records. The main content is a table with the following data:

<input type="checkbox"/>	Transaction ID ↑	Customer Name	Amount	Comment	Created At
<input type="checkbox"/>	7	Veronica <roni_cost@example.com>	-41.81	Spent with order #000000003	2019-09-05 20:03:05
<input type="checkbox"/>	6	Veronica <roni_cost@example.com>	30.00	loyal customer	2019-09-05 19:59:59
<input type="checkbox"/>	5	Veronica <roni_cost@example.com>	65.00		2019-09-05 19:58:57
<input type="checkbox"/>	4	Veronica <roni_cost@example.com>	-100.00		2019-09-05 19:58:46
<input type="checkbox"/>	3	Veronica <roni_cost@example.com>	80.00		2019-09-05 19:58:39
<input type="checkbox"/>	2	Veronica <roni_cost@example.com>	-50.00		2019-09-05 19:58:33
<input type="checkbox"/>	1	Veronica <roni_cost@example.com>	300.00		2019-09-05 19:42:30

At the bottom of the page, there is a copyright notice: 'Copyright © 2019 Magento Commerce Inc. All rights reserved.' and a link to 'Report an Issue'. The Magento version is noted as 'Magento ver. 2.3.2'.

Custom and system comments can be found in the Comment column. System comments that appear here:

- Spent with order #xxxxxxx - Default comment for store credit transactions used to pay for new orders
- Refund for order #xxxxxxx - Default comment for refunds to store credit balance
- Purchased with order #xxxxxxx - Default comment for adding a value to store credit balance through store credit product purchases

Customers see an identical table in their profile in "My Store Credit" tab:




[What's New](#)
[Women](#)
[Men](#)
[Gear](#)
[Training](#)
[Sale](#)
[My Account](#)
[My Orders](#)
[My Downloadable Products](#)
[My Wish List](#)
[Address Book](#)
[Account Information](#)
[Stored Payment Methods](#)
[Billing Agreements](#)
[My Product Reviews](#)
[Newsletter Subscriptions](#)
[My Store Credit](#)

## My Store Credit

Your current store credit balance is **\$283.19**

Transaction #	Comment	Value	Date
7	Spent with order #000000003	-\$41.81	2019-09-05 20:03:05
6	loyal customer	\$30.00	2019-09-05 19:59:59
5		\$65.00	2019-09-05 19:58:57
4		-\$100.00	2019-09-05 19:58:46
3		\$80.00	2019-09-05 19:58:39
2		-\$50.00	2019-09-05 19:58:33
1		\$300.00	2019-09-05 19:42:30

7 Item(s)

Show  per page

Customers will see store credit used per order in the My Orders page.

If store credit was applied for a particular order, customers will be shown the Paid with store credit field. This field will contain the corresponding store credit value used.

If store credit was not used for the order, the field is not displayed.


## 7 Purchasing with Store Credit

Customers who have at least 1 store credit available will have an option to pay for their order with the said credit.

If a customer enters a value higher than his maximum store credit value, any of these 2 will happen:

1. If the total order amount is less than the customer's store credit balance, the value will be automatically corrected to the full amount of the order except the cents or decimal part. For example, if the total is \$11.85, \$11 will be deducted from store credit and the remaining \$0.85 should be covered by other payment options.
2. If the total order amount is greater than the customer's store credit balance, the error message "Store credit balance is not sufficient" will be shown.

Upon clicking on "Apply" button to apply the store credit on the checkout, the customer will see a success message along with the recalculation of the Order Total.

 The store credit section on the checkout is only displayed for customers with an existing store credit balance.

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You can purchase **Store Credit** at  
[https://www.aitoc.com/store-credit-f  
or-magento-2.html](https://www.aitoc.com/store-credit-for-magento-2.html)

For questions please email at  
[sales@aitoc.com](mailto:sales@aitoc.com)