Customer Credit

User Guide

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Extension Description

Customer Credit extension raises Magento based stores to a higher level of e-commerce business giving customers a pleasurable possibility to make “free of charge” purchases using money available in the account. The extension can also help to attract additional customer audience with the help of prepaid debit cards, which can be automatically generated by a store admin or a sales manager. All operations and payment activity using Internal Credit balance are being logged for a customer and a store manager convenience.

Customer Credit operates as one of Magento payment methods, i.e. “Purchase Order” or “Check/Money order” etc. Customer Internal Credit balance is rechargeable. Money can be loaded either by admin or by store account owner using “Recharge Code”. However, admin has extended functionality for managing customers. He can replenish or charge customer balance and every operation can be additionally commented. On multi website Magento stores admin can manage customer balance independently for each website regardless of different currencies.

Extension Installation

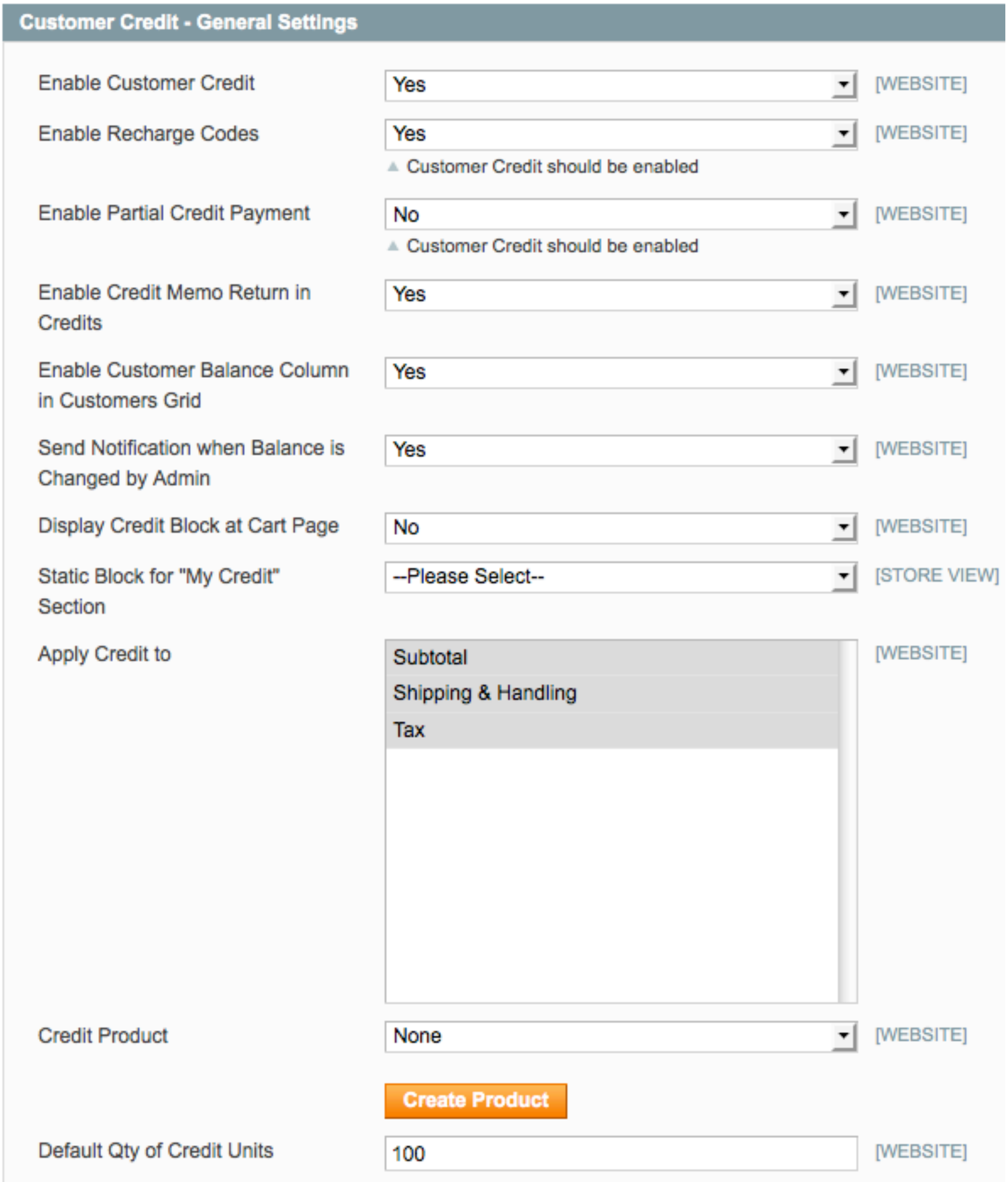
1. Disable Compilation Mode if enabled
2. Log out from Magento Admin panel if you are logged in
3. Unpack the contents of the ‘extension’ folder (depending on your current Magento version) from the package file purchased from MageWorx to your Magento root folder
4. Log into Magento Admin Panel
5. If Cache Control is enabled in Magento go to ‘System > Cache Management’ section, select ‘Refresh’ under ‘All Cache’ drop-down menu and press ‘Save Cache Settings’
6. Run Compilation Mode back if necessary
7. Now go to ‘System > Configuration > MageWorx tab > Extensions & Support’ section. If you see ‘Customer Credit’ in the list of installed MageWorx extensions you are done.

Extension Usage

Back-end

Settings

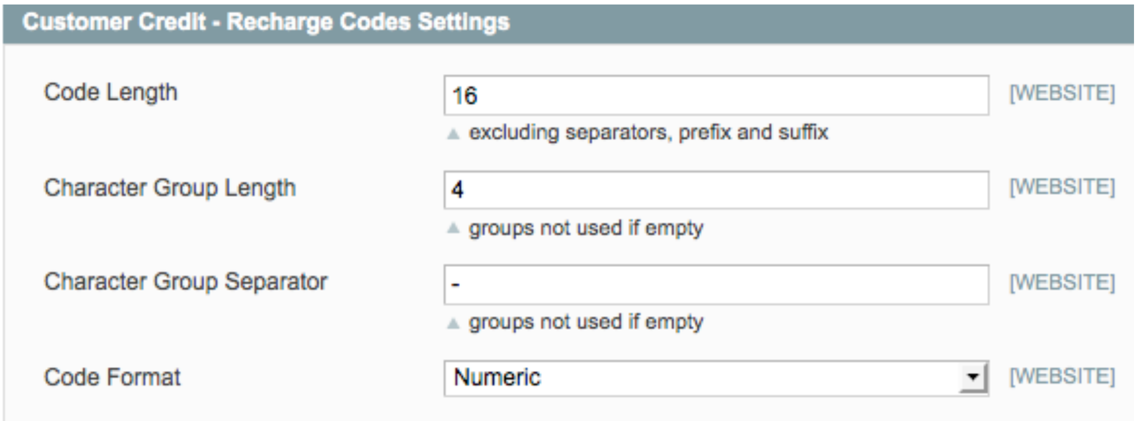
Log into Magento Admin panel and go to ‘System > Configuration > MageWorx tab > Customers > Customer Credit — General Settings’ section to ensure Customer Credit is enabled



- **Enable Customer Credit** – enables/disables internal balance for customers.
- **Enable Recharge Codes** – enables/disables the possibility to use recharge codes.

- **Enable Partial Credit Payment** – enables/disables the possibility to use internal balance along with other payment methods.
- **Enable Credit Memo Return in Credits** – allows you to return internal credits instead of funds in case of offline refunds.
- **Enable Customer Balance Column in Customers Grid** – displays/hides "Customer Balance" column in the grid of customers. This shows available balance of every customer.
- **Send Notification when Balance is Changed by Admin** – if enabled, an email notification is send when admin changes balance of a customer manually.
- **Display Credit Block at Cart page** – displays/hides the credit block at cart page, where customers can see their available balance and use credits directly from this page.
- **Static Block for "My Credit" section** – you can assign a static block, which will be shown at "My Credit" page in a customer's account.
- **Credit Product** – the drop-down that allows you to select any virtual product, which will be used for purchasing credits using other payment methods. See more details at page…
- **Default Qty of Credit Units** – number of Qty of Credit Units, which your customers will see in "My Credit" section by default.

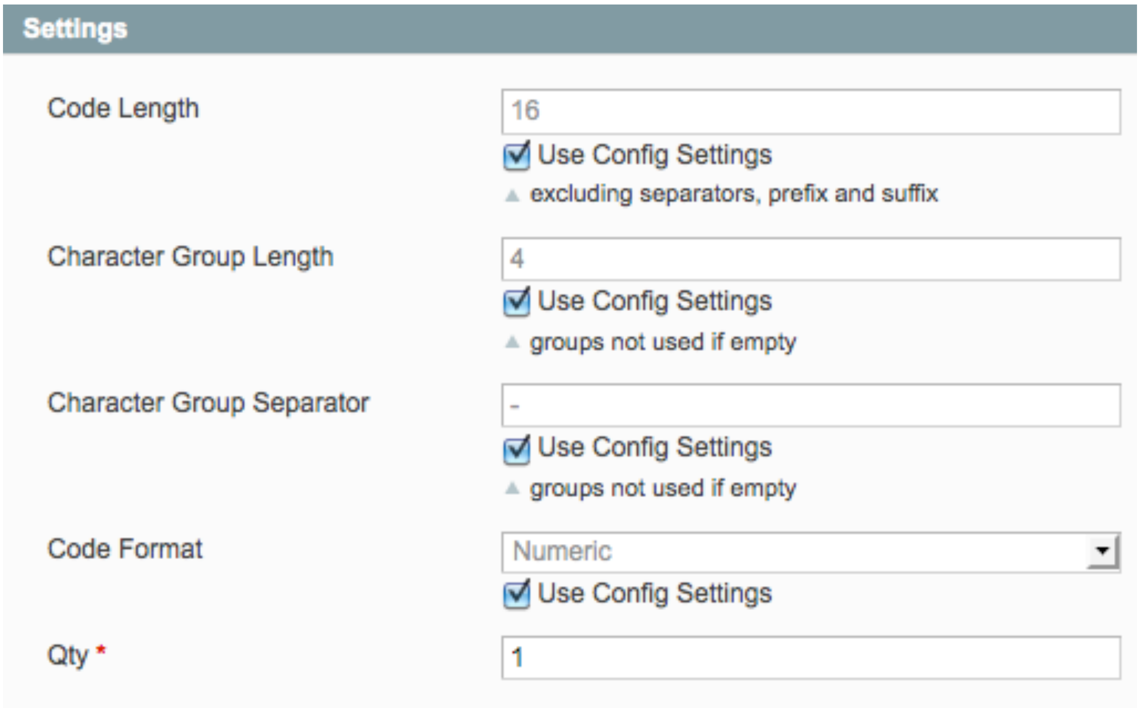
Configure default Recharge Codes settings in the ‘Customer Credit — Recharge Codes Settings’ subsection



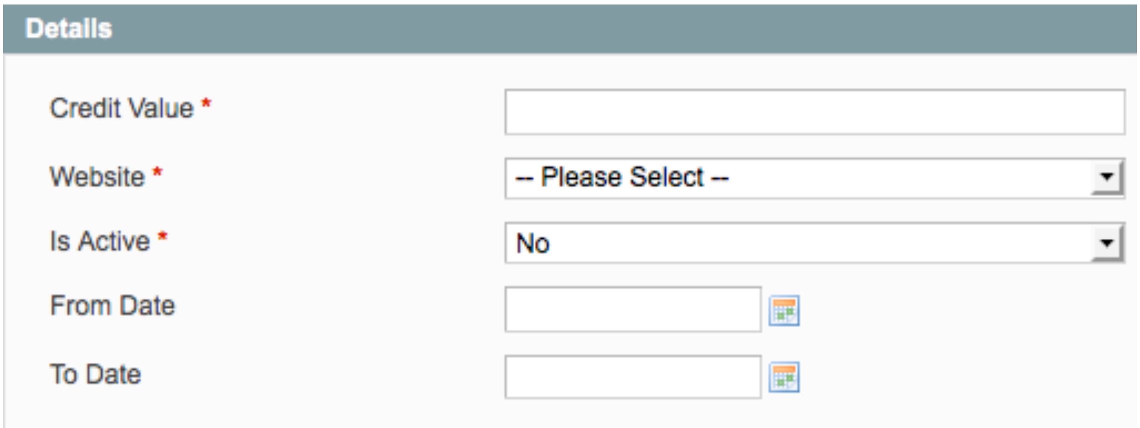
- **Code Length** — number of characters in a Recharge Code
- **Character Group Length** — number of characters in a group of characters separated by **Character Group Separator**
- **Code Format** — characters used to generate Recharge Codes

Recharge Codes

To generate a set of Recharge Codes go to ‘Promotions > Recharge Codes’ section and click ‘Generate New Recharge Codes’ button. Under the ‘Settings’ tab modify or leave default settings as is

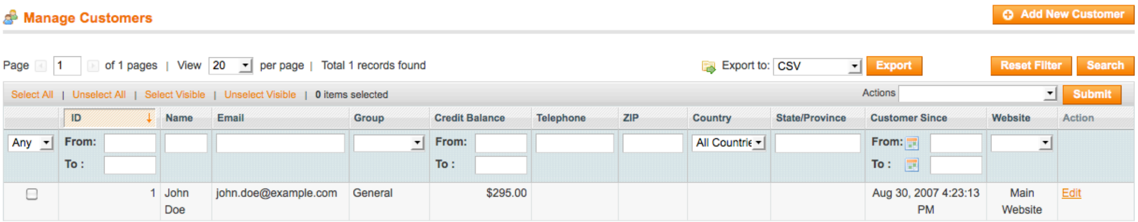


Under the ‘Details’ tab enter ‘Credit Value’, choose website, select activity status and period



Manage Customers

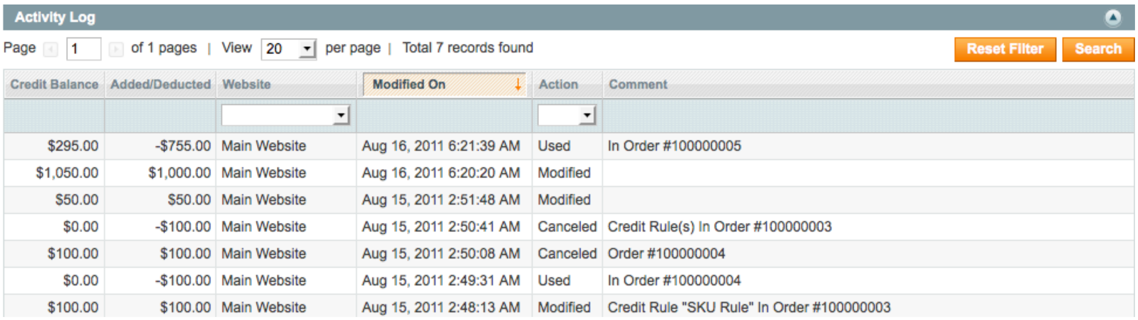
Customer’s internal balance can be displayed directly from customers’ grid at Manage Customers page. This column can be displayed/hidden based on the setting in the extension:



You can filter customers by available credit amount if necessary.

To add funds to or deduct from a customer Credit balance go to 'Customers > Manage Customers' section, choose the desired customer account and open Internal Credit tab

All the credits actions are logged:



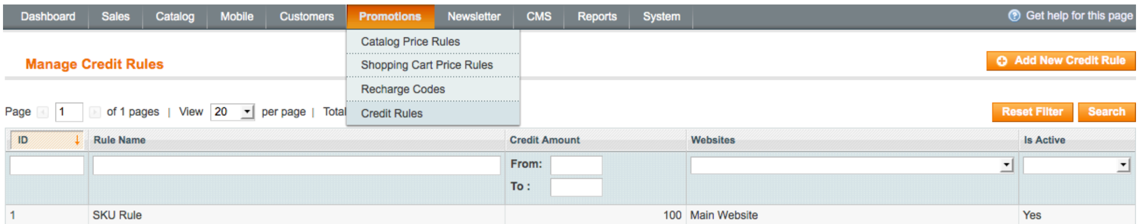
Activity Log

Page 1 of 1 pages | View 20 per page | Total 7 records found

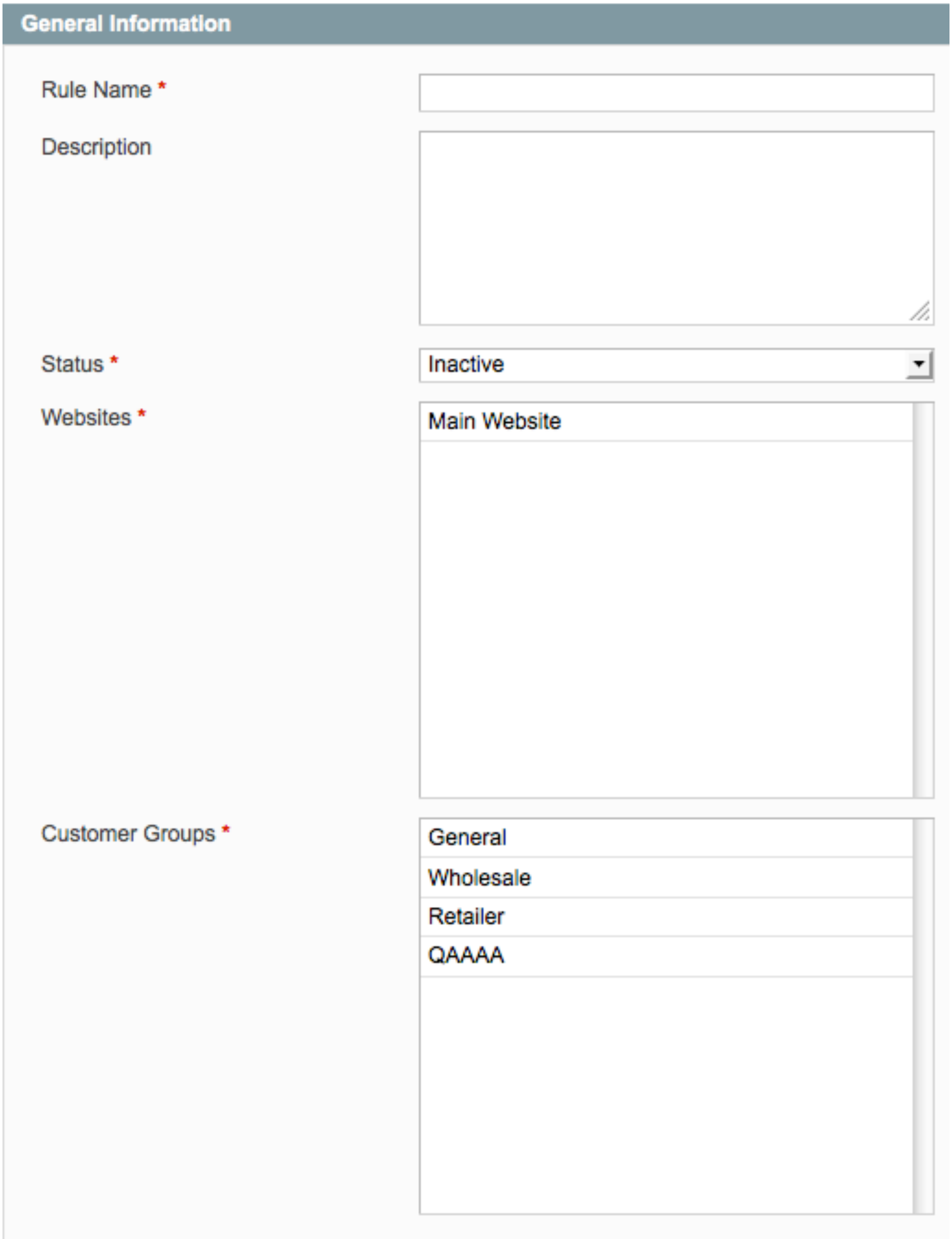
Credit Balance	Added/Deducted	Website	Modified On	Action	Comment
$295.00	-$755.00	Main Website	Aug 16, 2011 6:21:39 AM	Used	In Order #100000005
$1,050.00	$1,000.00	Main Website	Aug 16, 2011 6:20:20 AM	Modified	
$50.00	$50.00	Main Website	Aug 15, 2011 2:51:48 AM	Modified	
$0.00	-$100.00	Main Website	Aug 15, 2011 2:50:41 AM	Canceled	Credit Rule(s) In Order #100000003
$100.00	$100.00	Main Website	Aug 15, 2011 2:50:08 AM	Canceled	Order #100000004
$0.00	-$100.00	Main Website	Aug 15, 2011 2:49:31 AM	Used	In Order #100000004
$100.00	$100.00	Main Website	Aug 15, 2011 2:48:13 AM	Modified	Credit Rule "SKU Rule" In Order #100000003

Credit Rules

Customer Credit extension allows you to create the rules to give credits to customers automatically based on specific conditions. Thus, you can easily give the credits to every new customer, when customers get certain amount purchased (overall orders numbers) or when customers purchase particular products. All this can be done on Promotions – Credit Rules page



To create a new rule, you should click on “Add new Credit Rule” button. You will see 3 tabs there. The 1st one is “Rule Information” tab:

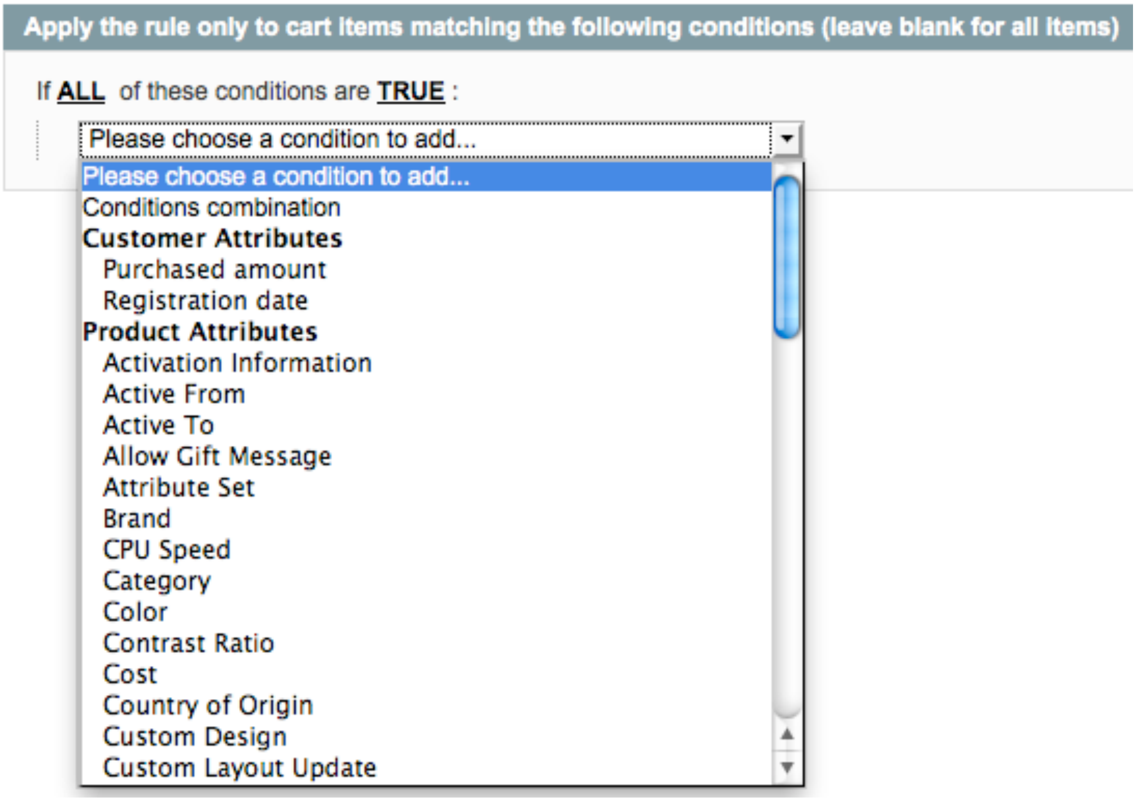

General Information
Rule Name *
Description
Status *
Inactive
Websites *
Main Website
Customer Groups *
General
Wholesale
Retailer
QAAAA

- **Rule Name** – the name of the rule you are creating. It will be visible in the back-end and in the front-end in customer's log when it's actually triggered.
- **Description** – the description of the rule. It's visible only in the back-end.
- **Status** – the status of the rule (active/inactive).
- **Websites** – the website where the rule should be applied.
- **Customer Groups** – the rule will be applied to the customers of these groups only.

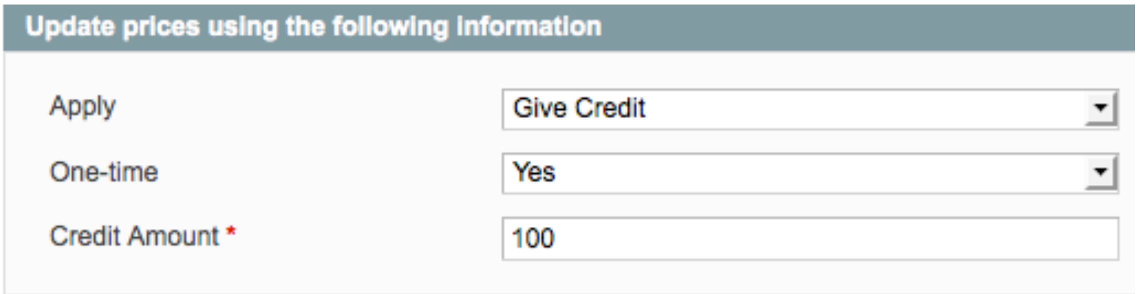
The "Conditions" tab includes all available conditions you can use for credit rule. There are two types of conditions: Customer Attributes *(Purchased Amount and Registration Date)* and Product Attributes *(all available attributes in your Magento store)*.

For example, with "Customer Attributes" conditions you can create the rules to give credits to every new customer or when customers get certain amount purchased (it calculates the sum of all customer's orders)).

"Product Attributes" conditions allow you to give credits for purchases of specific products only. Thus, you can motivate your customers to order appropriate products by giving credits for them.



In the “Actions” tab you can specify the amount of credits, which will be added when this rule is triggered and mark the rule as one-time or not. If you select a one-time flag to a rule, it means that this rule will be applied only once per a customer. *For example, customer will receive $100 in credits only for one purchase of your product*. If you need to give the credits based on the rule unlimited number of times per a customer, you should select “No” for “One-time” option. *Example: you create a rule for Nokia cell phone. Each time a customer purchases this product, he/she will receive the credits. With enabled One-time option, he/she will receive the credits only after the 1st purchase. All other purchases of this product will be ignored.*

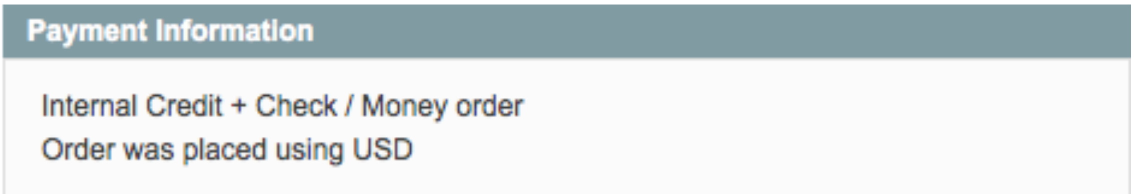


Customers receive credits once the order is completed.

Orders View

Internal Credit amount is deducted from the order total decreasing Grant Total. Example of how internal credits are shown in the order view:

Payment Information



Order Total

You can also use credits when processing offline refunds. Now it's possible to give internal credits to customers instead of refund funds. Just specify the amount of credits you need to return:

Note: amount of credits are filled in automatically to make your life easier ☺. You can still edit this amount if necessary.

Import/Export credits

Since v1.3.0 you can import/export customers' balances via CSV. To know how to import balances for customers, you can export them first. Go to System - Import/Export - Dataflow Profiles - choose "Export Customers" profile - Run this profile. Open the result CSV file. You see "credit_balance" column.

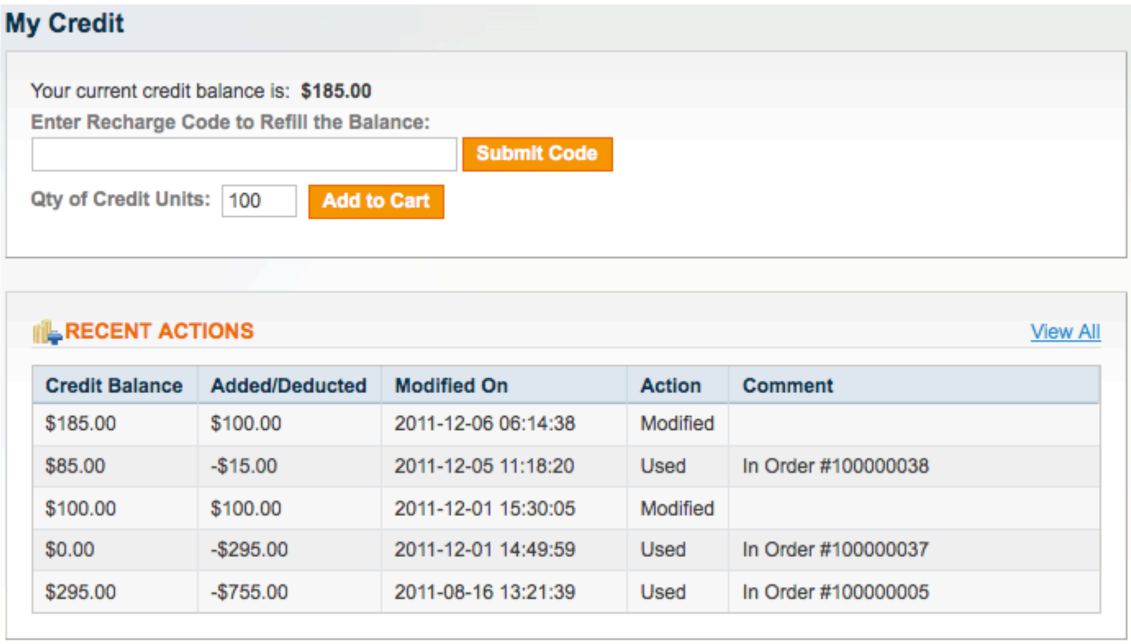
In order to import customers' balances you should create CSV file and upload it in System - Import/Export - Dataflow Profiles - select "Import Customers" profile - go to "Upload File" tab - select certain file and upload it - Run profile from "Run Profile" tab. You can fill "credit_balance" column in following the rules:

- credit_balance = 100 – it updates customer's balance with "100" value;
- credit_balance = 100+ - it adds 100 to current customer's balance;
- credit_balance = 100- - it deducts 100 from current customer's balance;

Front-end

"My Credit" section

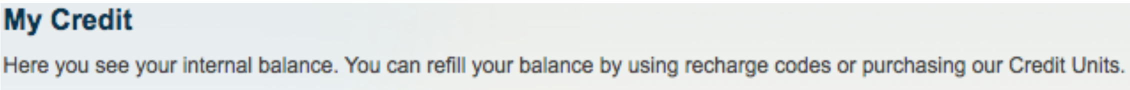
Customers can refill their Credit Balance in the 'My Credit' section under a user account using Recharge Codes or purchase Credit Units using other payment methods.



Credit Balance	Added/Deducted	Modified On	Action	Comment
$185.00	$100.00	2011-12-06 06:14:38	Modified	
$85.00	-$15.00	2011-12-05 11:18:20	Used	In Order #100000038
$100.00	$100.00	2011-12-01 15:30:05	Modified	
$0.00	-$295.00	2011-12-01 14:49:59	Used	In Order #100000037
$295.00	-$755.00	2011-08-16 13:21:39	Used	In Order #100000005

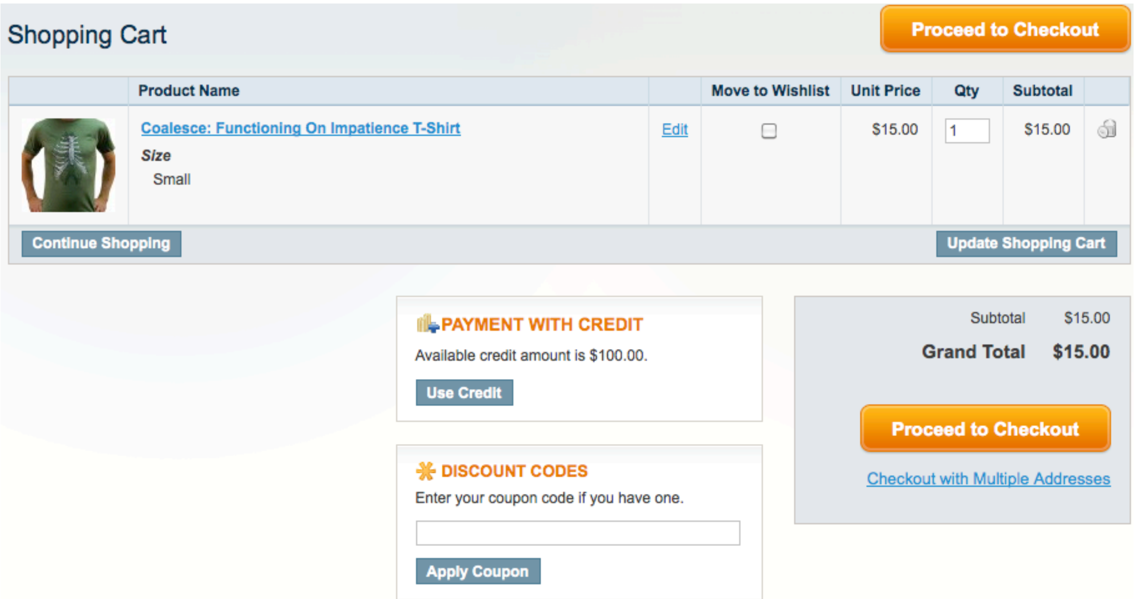
Customer will see the Order ID and the rule name (if applied) based on which the credits are added. Customers will also see when the credits are modified by admin or deducted because of order cancellation or refund.

It's also possible to display a static block on "My Credit" page. For this you need to select an appropriate static block in the extension's settings. *Example:*

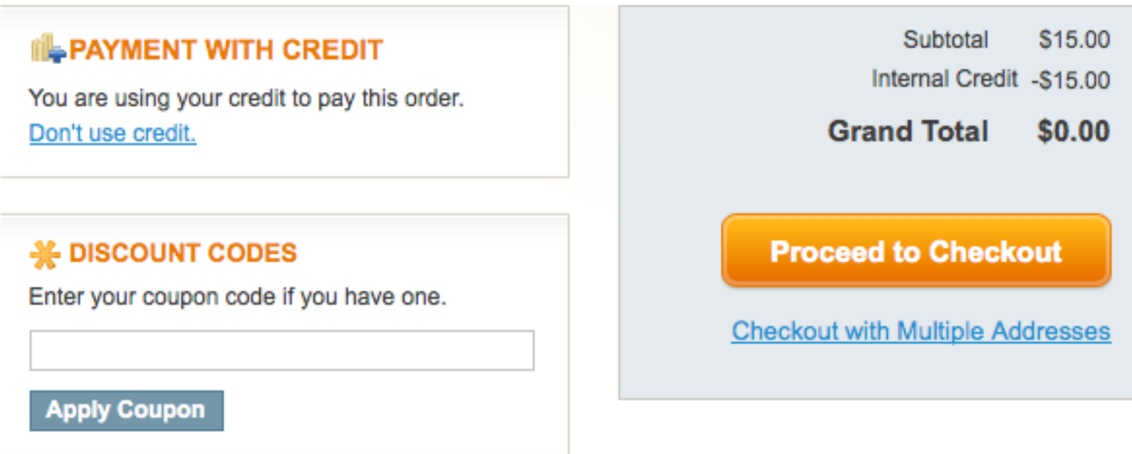


Cart Page

Customers can apply credits directly from a cart page. Our extension adds "Payment with Credit" block. Available balance is shown there along with the button to use credits for an order. Note: if customer's balance is not enough to fulfill the order, he will see "Get Credit" button, which will lead to "My Credit" section in customer's account, where customer will be able to receive credits.



If customer uses credits here, they will be deducted from order total:



If customer wants to cancel this action, he should click on “Don’t use credit”. This will removed applied credits from totals.

Checkout

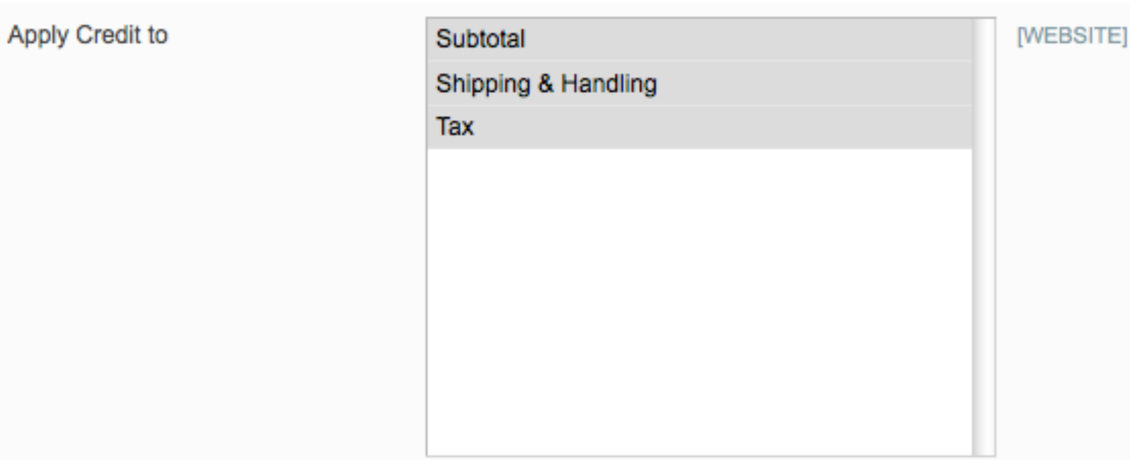
Internal Credit is available as a payment method during the checkout process:

“Recharge” link leads to “My Credit” section in customer’s account. Thus, customers always know how to recharge his internal balance.

If customer has internal credits and “Partial payments” setting is enabled, customers can use credits with other payment methods together. It’s useful if credits are not enough to pay for the whole order. In this case customers will pay the difference between order’s total and amount of credits with other payment method.

Please note that with enabled Partial Payments, the extension automatically detects credit amount and gives the possibility to use credits only or credits + other payment method. Thus, we recommend keeping this extension enabled.

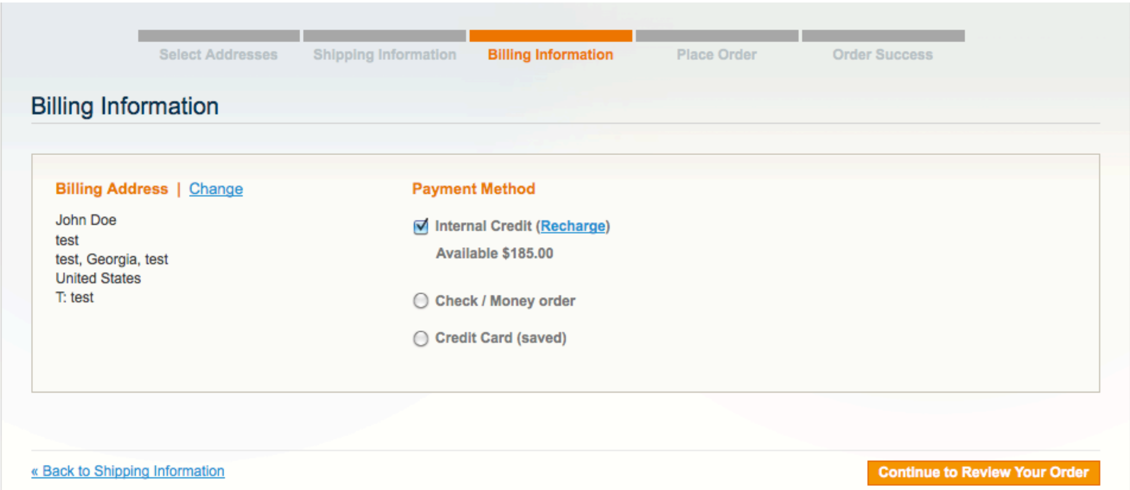
Since 1.4.0 it's possible to select what checkout attribute the credits should applied to. You can select Subtotal, Shipping & Handling and Tax:



The system analyses this selection and applies credits to what is chosen here. For example, if you do not want to allow your customers to pay shipping costs using credits, you can just to remove the selection from "Shipping & Handling" in this setting and the credits will ignore the costs of shipping. I.e. customers will need to pay for them using other payment method.

Multiple Addresses Checkout

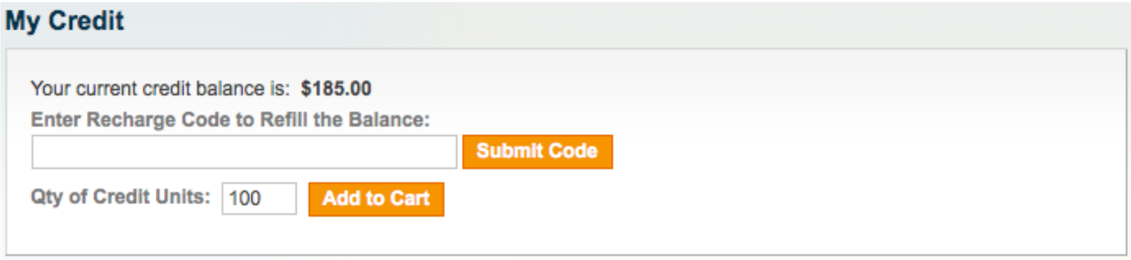
Customer Credit extension supports Multi-shipping checkout. You can pay the whole order using internal credits or use partial payment if necessary:



Credit Units

Since v1.4.0 Customer Credit extension allows creating virtual products that can be used to sell internal credits for real money. To quickly create such product, we recommend using “Create Product” button in the extension’s setting. It will create a virtual product with default settings and automatically select it as a credit product for your usage. If you want to edit it, you can go to edition page by clicking on “Edit” button in the extension’s settings or find it in Catalog – Manage Products – edit:

Customers can purchase any amount of internal credits. They should just enter necessary quantity in “Qty of Credit Units” field in “My Credit” section in customer’s account and add this product to cart. Further checkout process will be standard as for all virtual products. Customer receives the credits once the order is completed.



You can edit this product as you want or select another product at all. By default, Credit Unit product is created with the price $1.00 and visibility “Not Visible Individually”. You can turn this product in a promotional product, which will be visible on the front-end.

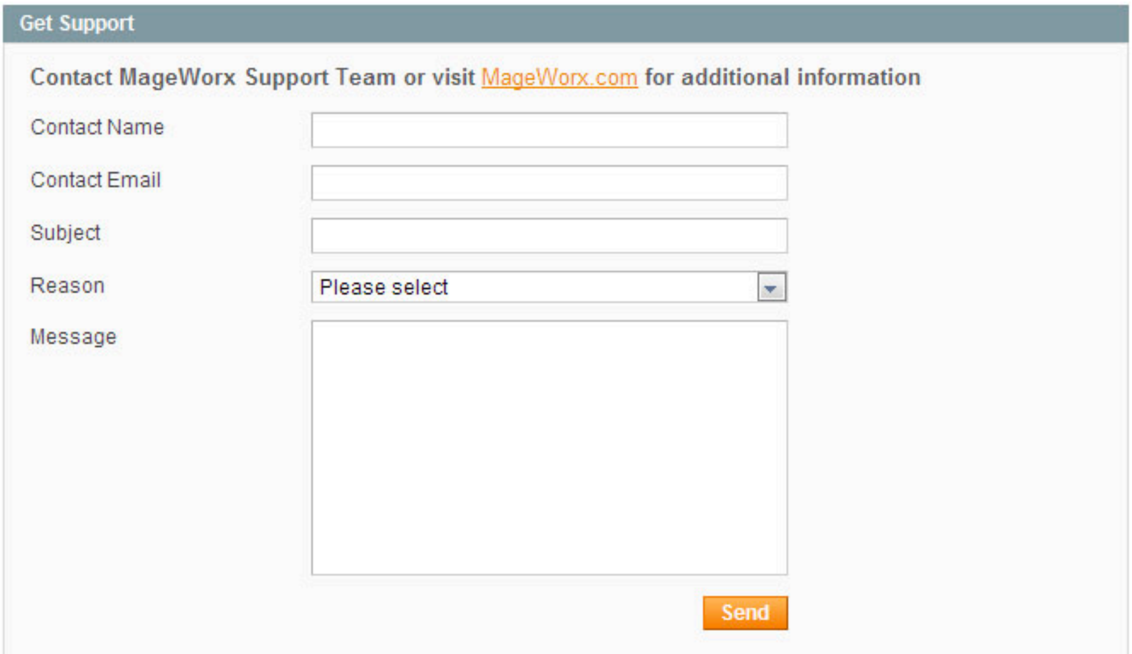
How to handle conversation between credits and your currency. Since Credit Unit is created as a standard product, you can easily change the price of it. This will change the ratio between 1 credit and 1 dollar, for example. By default, the price is $1. It means that for $1 customer receives 1 credit. If you change the price to $10, it will mean that customer will receive 1 credit for $10. Thus, playing with Credit Unit price, you change the cost of 1 credit for your customers.

Support

MageWorx offers FREE lifetime support and updates for any extension developed for Magento.

If you need support related to MageWorx extension usage, feel free to contact us at support@mageworx.com

Or send us a message directly from your Magento Admin Panel. To do it, go to ‘System > Configuration’ section, ‘MageWorx’ tab ‘Extensions & Support > Get Support’.



Getting Help with Magento

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