

# 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*

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

Customer Credit - General Settings		
Enable Customer Credit	<input type="text" value="Yes"/>	[WEBSITE]
Enable Recharge Codes	<input type="text" value="Yes"/> <small>▲ Customer Credit should be enabled</small>	[WEBSITE]
Enable Partial Credit Payment	<input type="text" value="No"/> <small>▲ Customer Credit should be enabled</small>	[WEBSITE]

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



Customer Credit - Recharge Codes Settings		
Code Length	<input type="text" value="16"/> <small>▲ excluding separators, prefix and suffix</small>	[WEBSITE]
Character Group Length	<input type="text" value="4"/> <small>▲ groups not used if empty</small>	[WEBSITE]
Character Group Separator	<input type="text" value="-"/> <small>▲ groups not used if empty</small>	[WEBSITE]
Code Format	<input type="text" value="Numeric"/>	[WEBSITE]

- **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

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

Settings	
Code Length	<input type="text" value="16"/> <input checked="" type="checkbox"/> Use Config Settings <small>▲ excluding separators, prefix and suffix</small>
Character Group Length	<input type="text" value="4"/> <input checked="" type="checkbox"/> Use Config Settings <small>▲ groups not used if empty</small>
Character Group Separator	<input type="text" value="-"/> <input checked="" type="checkbox"/> Use Config Settings <small>▲ groups not used if empty</small>
Code Format	<input type="text" value="Numeric"/> <input checked="" type="checkbox"/> Use Config Settings
Qty *	<input type="text" value="1"/>

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

Details	
Credit Value *	<input type="text"/>
Website *	<input type="text" value="-- Please Select --"/>
Is Active *	<input type="text" value="No"/>
From Date	<input type="text"/> 
To Date	<input type="text"/> 

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

Adjust Credit

Credit Value

[USD]

▲ A negative value subtracts from the credit balance

Website

Main Website

Comment

All the credits actions are logged:

Activity Log					
Page 1 of 1 pages   View 20 per page   Total 7 records found					
<div>Reset Filter</div> <div>Search</div>					
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

Dashboard Sales Catalog Mobile Customers **Promotions** Newsletter CMS Reports System [Get help for this page](#)

**Manage Credit Rules**

- Catalog Price Rules
- Shopping Cart Price Rules
- Recharge Codes
- Credit Rules**

[Add New Credit Rule](#)

Page 1 of 1 pages | View 20 per page | Total

[Reset Filter](#) [Search](#)

ID	Rule Name	Credit Amount	Websites	Is Active
1	SKU Rule	100	Main Website	Yes

To create a new rule, you should click on “Add new Credit Rule” button. You will see 3 tabs there. The 1<sup>st</sup> 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.

Apply the rule only to cart items matching the following conditions (leave blank for all items)

If **ALL** of these conditions are **TRUE** :

Please choose a condition to add...

Please choose a condition to add...

Conditions combination

**Customer Attributes**

- Purchased amount
- Registration date

**Product Attributes**

- Activation Information
- Active From
- Active To
- Allow Gift Message
- Attribute Set
- Brand
- CPU Speed
- Category
- Color
- Contrast Ratio
- Cost
- Country of Origin
- Custom Design
- Custom Layout Update

In the “Actions” tab you can specify the amount of credits, which will be added when this rule is triggered

Update prices using the following information

Apply	Give Credit
Credit Amount *	100

**Front-end**

Customers can refill their Credit Balance in the 'Internal Credit' section under a user account using Recharge Codes

**CREDIT BALANCE**

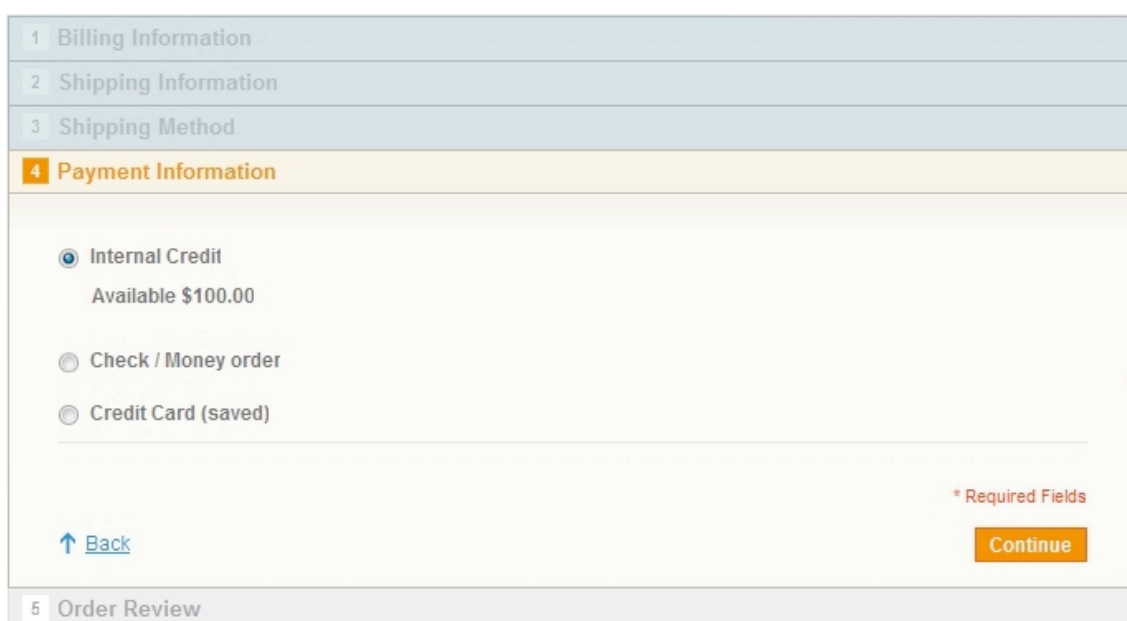
Your current credit balance is: **\$100.00**  
Enter Recharge Code to Refill the Balance:

**RECENT ACTIONS** [View All](#)

Credit Balance	Added/Deducted	Modified On	Action	Comment
\$100.00	\$100.00	2010-04-21 15:45:21	Modified	

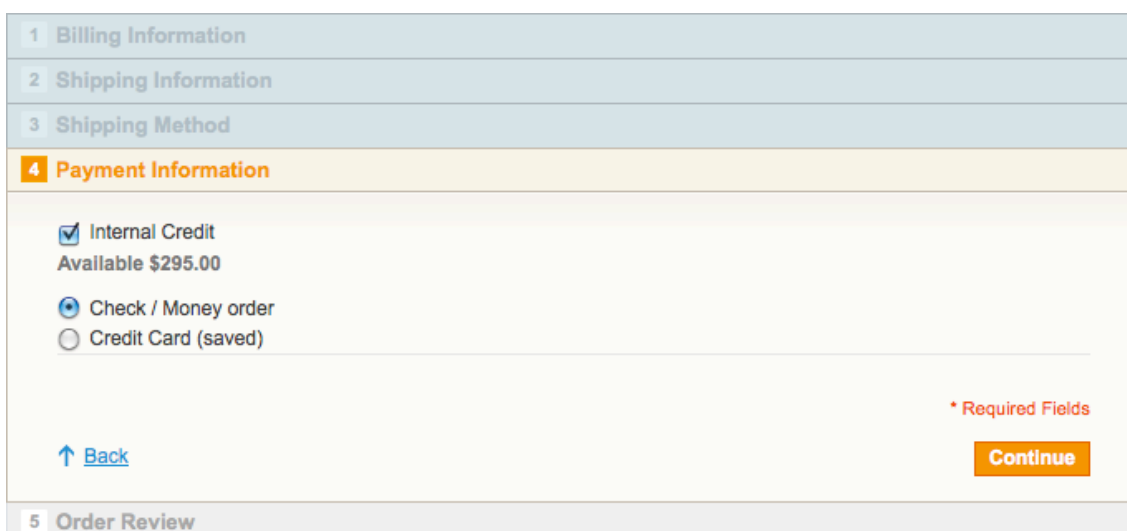
Customer will see the Order ID and the rule name (if applied) based on which the credits are added. Customers will also see when the credits are modified by admin or deducted because of order cancellation or refund.

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



The screenshot shows a checkout process with five steps: 1 Billing Information, 2 Shipping Information, 3 Shipping Method, 4 Payment Information (highlighted in orange), and 5 Order Review. In the Payment Information step, there are three radio button options: 'Internal Credit' (selected), 'Check / Money order', and 'Credit Card (saved)'. Below the 'Internal Credit' option, it says 'Available \$100.00'. At the bottom left, there is a blue link with an upward arrow and the text 'Back'. At the bottom right, there is an orange button labeled 'Continue'. A red asterisk followed by the text '\* Required Fields' is located above the 'Continue' button.

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.



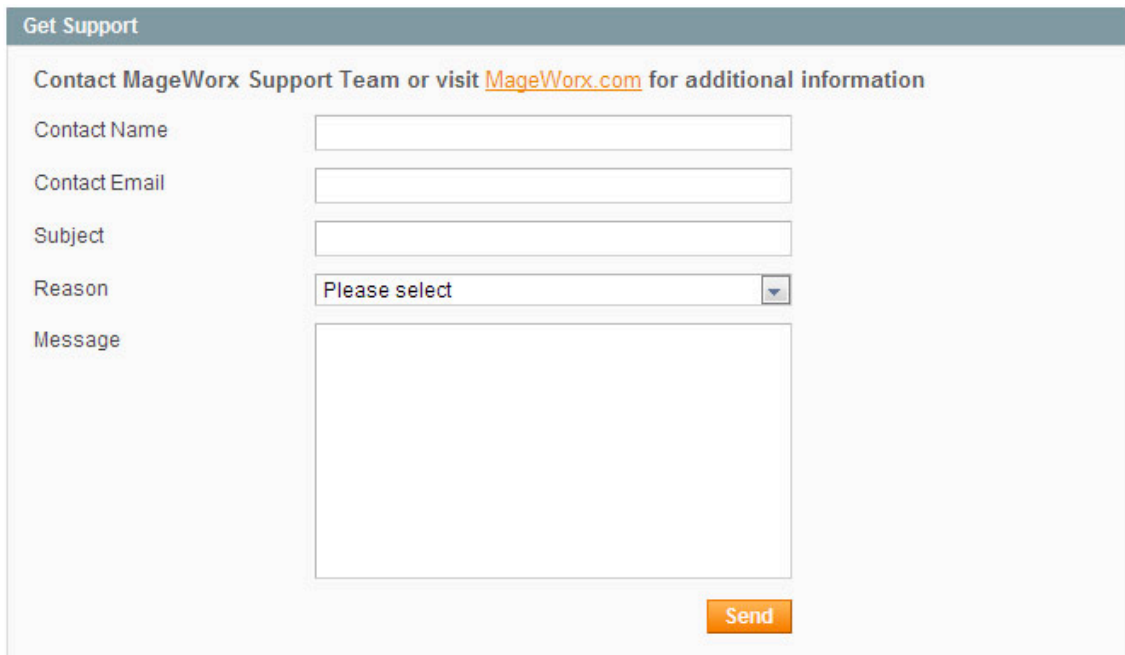
This screenshot is similar to the one above, showing the same checkout steps. In the 'Payment Information' step, the 'Internal Credit' option is now checked with a blue checkmark, and it shows 'Available \$295.00'. The 'Check / Money order' option is now selected with a blue radio button. The 'Credit Card (saved)' option remains unselected. The 'Back' link and 'Continue' button are still present at the bottom, along with the '\* Required Fields' text.

## 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](mailto: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'.



The screenshot shows a 'Get Support' form within the Magento Admin Panel. The form has a title bar 'Get Support' and a subtitle 'Contact MageWorx Support Team or visit [Mageworx.com](http://Mageworx.com) for additional information'. The form contains five input fields: 'Contact Name', 'Contact Email', 'Subject', 'Reason' (a dropdown menu with 'Please select' as the current selection), and 'Message' (a large text area). A 'Send' button is located at the bottom right of the form.

## Getting Help with Magento

MageWorx offers outstanding services developing custom tailored solutions for Magento platform to attain your eCommerce objectives.

Our professional impassioned team provides profound and custom oriented development of your project in a short timeframe. You are most welcome to contact us at [sales@mageworx.com](mailto:sales@mageworx.com)