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# Store Credit and Refund

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Link: http://ecommerce.aheadworks.com/magento-extensions/store-credit-and-refund.html

Store Credit And Refund Magento extension introduces store credit functionality that allows creating, editing and managing customer credit balance from the admin panel.
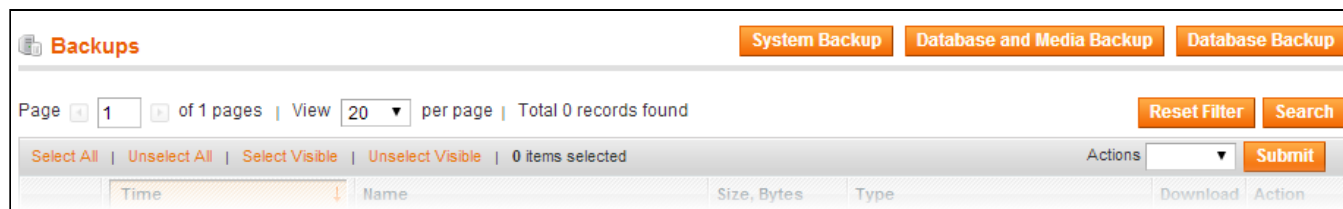
# Installation

1. Backup your web directory and store database.
   Click to view details
   You can make backup copies with any tool you find appropriate

   If you are going to use the native Magento backup function, navigate to **System -> Tools -> Backups** and perform **System** and **Database** backups



2. Log in to the Magento backend.

3. Disable compilation
   Click to view details
   Navigate to **System -> Tools -> Compilation**.

   If Compiler status is Disabled, you can skip to the next step

   If Compiler is enabled, disable it.

**Compilation**      ⊘ **Disable**   ⊘ **Run Compilation Process**

**Compilation State**

| | |
|---|---|
| Compiler Status | Enabled |
| Compilation State | Compiled |
| Collected Files Count | 7505 |
| Compiled Scopes Count | 4 |

**IMPORTANT:** after the extension is installed, you can enable the compilation again; **IT IS CRUCIAL** that you use "**Run Compilation Process**" function, not just "Enable button"

**Compilation**      ⊘ Enable   ⊘ **Run Compilation Process**

**Compilation State**

| | |
|---|---|
| Compiler Status | Disabled |
| Compilation State | Compiled |
| Collected Files Count | 7505 |
| Compiled Scopes Count | 4 |

Installing an extension with the Compilation enabled will result in store downtime.

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4. Flush store cache
   Click to view details
   You can flush the store cache in 2 ways:

   - **via the backend**:

   Navigate to **System -> Cache Management** menu, and click **Flush Magento Cache** button

   **Cache Storage Management**      ⊗ **Flush Magento Cache**   ⊗ Flush Cache Storage

   Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected      Actions Refresh ▼   Submit

   | | Cache Type | Description | Associated Tags | Status |
   |---|---|---|---|---|
   | ☐ | Configuration | System(config.xml, local.xml) and modules configuration files(config.xml). | CONFIG | ENABLED |
   | ☐ | Layouts | Layout building instructions. | LAYOUT_GENERAL_CACHE_TAG | ENABLED |
   | ☐ | Blocks HTML output | Page blocks HTML. | BLOCK_HTML | ENABLED |

   - **via filesystem**:

   On your server, navigate to Magento root folder, then proceed to **/var/cache/;** delete all the content there.

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5. Download the extension package from your account and extract the downloaded archive.

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6. Copy the content of **/Step_1/** folder to your store's root directory.

   **If you are using a custom theme,**
   read the instructions here.
   In case you are using a custom theme, it is recommended to copy the design files to your current theme's folders. In case there are several themes in use at the same store, the design files must be copied to each of them.

   - Find this folder in the package: */step_1/app/design/frontend/base/default/* ; copy its content to */app/design/frontend/**[your_package]**/**[your_theme]**/*

- Find this folder in the package: */step_1/skin/frontend/base/default/* ; copy its content to */skin/frontend/[your_package]/[your_theme]/*

7. Copy the content of */Step_2/* folder to your store's root directory.

8. Flush store cache again; log out from the backend and log in again.

# Zero Checkout

Providing you want to let your customers to checkout solely with store credit (paying for the whole order with credit) the **Zero Subtotal Checkout** should be enabled.

To enable **Zero Subtotal Checkout** navigate to your Magento backend **System > Configuration > Sales> Payment Methods > Zero Subtotal Checkout** and set 'Enabled' field to 'Yes'.

Now your customer can checkout with store credit solely.

| Zero Subtotal Checkout | | |
|---|---|---|
| Title | No Payment Information Required | [STORE VIEW] |
| Enabled | Yes | [WEBSITE] |
| New Order Status | Pending | [WEBSITE] |
| Payment from Applicable Countries | All Allowed Countries | [WEBSITE] |
| Payment from Specific Countries | Afghanistan | [WEBSITE] |

# Configuration

The extension's configuration page is located at **System -> Configuration -> aheadWorks Extensions -> Store Credit and Refund**. The same page can be accessed via **Sales -> Store Credit -> Settings**.

**General Settings** tab:

- **Enable Module** - activates /de-activates the extension.
- **Refund to Store Credit automatically** - defines whether the Store Credit will be a default refund method or not.

| General Settings | | |
|---|---|---|
| Enable Module | Yes | [WEBSITE] |
| Refund to Store Credit automatically | Yes ▲ The option defines the default Credit Memo behavior | [GLOBAL] |
| Display 'Store Credit' in top links | Yes | [STORE VIEW] |
| Display customer Store Credit Balance in top links | Yes | [STORE VIEW] |
| CMS Page in Customer Area | -- Please Select -- ▲ Redirects a customer to this CMS page when clicking on the 'Question' icon | [STORE VIEW] |

### How does it work?

This option defines whether the **Refund to Store Credit** checkbox will be on by default, or a store admin will need to tick it manually each time a credit memo is issued.

Append Comments ☐
Email Copy of Credit Memo ☐
Refund to Store Credit ☑   3034.5
✓ **Refund Offline**

- **Display 'Store Credit' in top links** - shows / hides the link to the Store Credit account page in the header menu.
- **Display customer Store Credit Balance in top links** - works in conjunction with the option above; shows / hides the current balance.

### How does it look like?

Here's how the Top Links record look like with the balance display enabled:

Welcome, Mariko Huffstutler!
My Account | **Store Credit ($64.98)** | My Wishlist | My Cart | Checkout | Log Out

- **CMS Page in Customer Area** - sets the destination page for the "learn more" link in the customer account.

**How does it look like?**
The question icon in the customer's account is a clickable link, that will redirect a customer to the designated page.

**Balance**

Your current balance is: 55,00 $US 🛈 ⬅
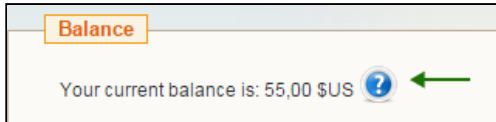
**Email Notifications** tab:

- **Subscribe customers automatically** - defines whether a customer will be automatically subscribed to balance update notices the first time they receive store credit.
- **Enable automatic logging in** - defines whether following the links from the update notices will log a customer in to their account.
- **Landing Page** - sets the destination page for all the store backlinks in the module's notifications. If left empty, the default destination will be the Home page.
- **Email Sender** - defines the Sender for the extension's emails.
- **Balance update template** -allows selecting the notification email template.

| Email Notifications | | |
|---|---|---|
| Subscribe customers automatically | Yes ▾ | [WEBSITE] |
| Enable automatic logging in | No ▾ | [WEBSITE] |
| | ▲ All links in the email will log a customer in! | |
| Landing Page | | [STORE VIEW] |
| | ▲ Related to website URL, e.g. "phones/samsung/". The customer will be browsed to this page after clicking on the 'come back' link in the email. | |
| Email Sender | General Contact ▾ | [STORE VIEW] |
| Balance update template | AW_Storecredit Email Template (Default Temp ▾ | [STORE VIEW] |

# Managing Store Credit

The extension allows tracking and managing the store balance through 2 dedicated grids: **Customers** and **Transactions**.

## Tracking Customers

To view the list of all the clients who have ever had a positive credit balance at your store, navigate to the **Sales -> Store Credit -> Customers** grid. This Grid shows the customer info (*Name, Email, Group, etc*) and extension-specific values: ***Total Credit Earned***, ***Total Credit Spent***, ***Current Balance*** and ***Subscription Status***.

Through this grid, you can change customers' subscription status as a mass action.

**Customers**

| | Customer ID | Name | Email | Group | Country | Customer Since | Last Visit | Total Credit Earned | Total Credit Spent | Current Balance | Balance Update Subscription |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Any ▼ | From:<br>To: | | | ▼ | All Co ▼ | From:<br>To: | From:<br>To: | From:<br>To: | From:<br>To: | From:<br>To: | ▼ |
| ☐ | 3 | Mariko Huffstutler | MarikoHuffstutler@example.com | General | United States | May 21, 2013 1:08:19 AM | Nov 11, 2014 4:36:01 AM | $1,124.97 | $1,059.99 | $64.98 | Subscribed |
| ☐ | 10 | Treva Catlow | TrevaCatlow@example.com | General | United States | May 21, 2013 1:08:20 AM | | $10.00 | $0.00 | $10.00 | Subscribed |
| ☐ | 8 | Debroah Bookmiller | DebroahBookmiller@example.com | General | United States | May 21, 2013 1:08:20 AM | | $10.00 | $0.00 | $10.00 | Subscribed |

# Tracking Transactions

To view all the transactions that involved store credit, navigate to the grid located at **Sales -> Store Credit -> Transactions**.

Transaction Types:

- **Created** - reflects the initial action when a customer earns some store credit for the 1st time.
- **Modified** - reflects one of the following events: a balance is changed by the store admin.
- **Used** - reflects customer's spending any part of their available balance on an order.
- **Refunded** - reflects a balance update after an admin issues a refund to the store credit.

**Transactions**

| ID | Name | Email | Date | Action | Balance Change | Balance | Additional information |
|---|---|---|---|---|---|---|---|
| | | | From:<br>To: | ▼ | From:<br>To:<br>In: USD ▼ | From:<br>To:<br>In: USD ▼ | |
| 8 | Mariko Huffstutler | MarikoHuffstutler@example.com | Nov 11, 2014 5:30:18 AM | Used | -$1,059.99 | $64.98 | Spent on order #100000018. |
| 7 | Mariko Huffstutler | MarikoHuffstutler@example.com | Nov 11, 2014 4:35:05 AM | Modified | $10.00 | $1,124.97 | Added by admin: Reward for good reviews. |
| 6 | Debroah Bookmiller | DebroahBookmiller@example.com | Nov 11, 2014 4:35:04 AM | Created | $10.00 | $10.00 | Added by admin: Reward for good reviews. |
| 5 | Treva Catlow | TrevaCatlow@example.com | Nov 11, 2014 4:35:03 AM | Created | $10.00 | $10.00 | Added by admin: Reward for good reviews. |
| 4 | Mariko Huffstutler | MarikoHuffstutler@example.com | Nov 11, 2014 4:33:12 AM | Refunded | $404.99 | $1,114.97 | Order refunded #100000017.<br>Credit Memo #100000002 |
| 3 | Mariko Huffstutler | MarikoHuffstutler@example.com | Nov 11, 2014 4:14:15 AM | Modified | $404.99 | $709.98 | Order canceled #100000015. |
| 2 | Mariko Huffstutler | MarikoHuffstutler@example.com | Nov 11, 2014 1:42:23 AM | Used | -$404.99 | $304.99 | Spent on order #100000015. |
| 1 | Mariko Huffstutler | MarikoHuffstutler@example.com | Nov 11, 2014 1:37:57 AM | Created | $709.98 | $709.98 | Order refunded #100000014.<br>Credit Memo #100000001 |

# Adding / Modifying Customer Balance

The extension offers several ways for a store admin to update the customer's account. It is possible to make an update individually for exact customer and/or perform mass actions.

## Via Edit Customer screen

To track and update customer's current balance, use the dedicated **Store Credit** tab added to the backend Customer View page.

To update a balance:

1. Enter the desired value in the **Update Store Credit** filed (entering a negative value will subtract from the balance).
2. If necessary, supply the **Comment** in the field below (*NOTE, the comment is visible to customer*).
3. Save customer account.

**Store Credit Balance**

| | |
|---|---|
| Current Balance: | **$64.98** |
| Subscribed to Balance Update? | ☑ |

**Update Store Credit Balance**

| | |
|---|---|
| Update Store Credit | [ ] |
| | ▲ Enter a negative number to subtract from balance |
| Comment | [ ] |

**Store Credit History**

Page ◀ 1 ▶ of 1 pages | View 20 ▼ per page | Total 6 records found  **Reset Filter** **Search**

| Balance | Balance Change | Action | Additional information | Date ↓ |
|---|---|---|---|---|
| From: [ ]<br>To: [ ]<br>In: USD ▼ | From: [ ]<br>To: [ ]<br>In: USD ▼ | [ ▼ ] | [ ] | From: 🗓 [ ]<br>To: 🗓 [ ] |
| $64.98 | -$1,059.99 | Used | Spent on order #100000018. | Nov 11, 2014 5:30:18 AM |
| $1,124.97 | $10.00 | Modified | Added by admin: Reward for | Nov 11, 2014 4:35:05 |

## Via Mass Action

To perform mass balance updates, use the Transactions grid:

1. Click **Add New** button.
2. After a page redirect, specify the **update amount** in the **Store Credit Balance Change** field (entering a negative value will subtract from the balance).
3. Supply the **Comment** in the with the field below.
4. Select the necessary **customer accounts** from the list.
5. Click **Save Transaction**.

## Integration with other AW modules

The Store Credit and Refund extension integration with other aheadWorks products enables extra functionality:

- **One Step Checkout** - if you are using One Step Checkout, the "Apply Store Credit" option will be displayed under the *Coupon Code* field.



## Uninstallation

If you just need to temporary disable the extension, you can just do the steps 1-5, without deleting the files of the extension.

- Disable compilation, in case it is enabled.
- Login to your FTP, navigate to **app/etc/modules/**

- Open the file **AW_Storecredit.xml** and change the following line:

```
<active>true</active>
```

to

```
<active>false</active>
```

Now your Magento is unaware of the existence of this module.
- Clear the cache under var/cache
- Make sure that the site is working properly, otherwise roll back the changes and apply to our technical support.
- If everything works fine, it is safe to delete the files of the extension.
- In case you need to clean the database, **backup your database** and then run the following queries in MySQL:

> It is necessary to run the queries in the specified order

```
DROP TABLE IF EXISTS `aw_storecredit_history_additional_info`;
```

```
DROP TABLE IF EXISTS `aw_storecredit_history`;
DROP TABLE IF EXISTS `aw_storecredit_creditmemo_totals`;
DROP TABLE IF EXISTS `aw_storecredit_invoice_totals`;
DROP TABLE IF EXISTS `aw_storecredit_order_refunded_totals`;
DROP TABLE IF EXISTS `aw_storecredit_quote_totals`;
```

```
delete from core_resource where code ='aw_storecredit_setup';
```

Note, if you are using the table with prefixes, you must specify them in all table names.

If you are not sure how to do that or expect any troubles with it, please contact your server administrator regarding the matter.
If you remove the tables as it is described above, you will need to set up the extension again after it is reinstalled. All transactions history will be lost as well.

# Troubleshooting

**After the extension installation the store gives an error, or blank page, or suggests to start Magento installation procedure.**

Change the owner of the extracted extension files to the web server user and set 775 permissions on them. Clear the store cache and try again.

**After the extension installation I receive 404 error in System->Configuration->Store Credit and Refund.**

Logout from backend and login back again.

**There is no aheadWorks extensions under my configuration section, or having the extension tab clicked I get a blank page, or Access Denied error.**

Clear the store cache, browser cookies, logout and login again.

**I've set up everything correctly, inserted the HTML code but there is nothing on that page.**

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

**My configuration changes do not appear on the store.**

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

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