

amasty

For more details see how the [Store Credit & Refund for Magento 2](#) extension works.

Guide for Store Credit & Refund for Magento 2

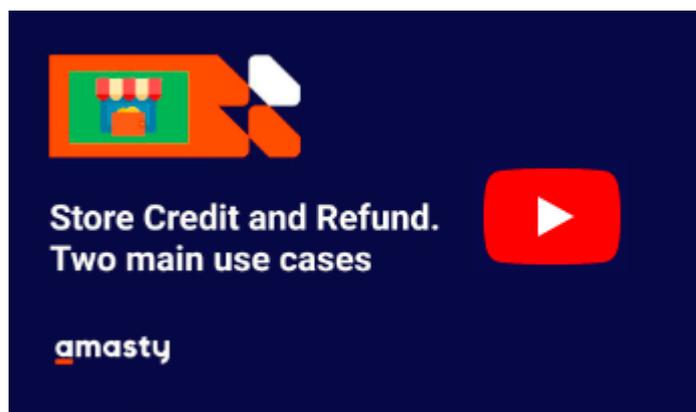
Boost sales by turning refunds into revenue. Use automated refund system and your 'store currency' to reduce losses on returns and build customers' loyalty.

- Grant store credits to motivate your customers make new purchases
- Easily add custom store credit amount to enhance customers' loyalty
- Allow customers to spend their store credits on purchase
- Quickly refund orders with store credits to boost sales
- Allow shoppers to track their refunds and store credits right in the Account
- Notify customers about any changes in their store credit balance
- ADA & WCAG compliant (for Luma and Hyvä Themes)
- Complies with Hyvä Checkout Content Security Policy
- Compatible with authorize.net

The extension is compatible with the **Hyvä Theme** and **Hyvä Checkout** for the Store Credit & Refund. You can find the 'amasty/module-store-credit-product-hyva' and 'amasty/module-store-credit-hyva' packages for installing in composer suggest (Note: the compatibility is available as a part of an active product subscription or support subscription).

Configuration

Use the video guide to set up the Store Credit & Refund extension.



The store credit currency in the admin panel is determined by the Base currency.

To configure the extension, go to **Stores → Configuration → Amasty Extensions → Store Credit**.

Expand the **General** tab.

General Settings

General

Enable Module <small>[store view]</small>	Yes	▼	
Refund Store Credit Automatically <small>[global]</small>	Yes	▼	?
Allow applying Store Credit on Tax <small>[store view]</small>	Yes	▼	
Allow applying Store Credit on Shipping <small>[store view]</small>	Yes	▼	
Transactions Log Auto-Cleaning <small>[global]</small>	Yes	▼	?
Auto-Cleaning Period (Days) <small>[global]</small>	90		?

Enable Module - set to Yes to enable refunding to Magento 2 store credit balance.

Refund Store Credit Automatically - select Yes if you want the **Refund to Store Credit** option to be set on the credit memo page by default.

Allow applying Store Credit on Tax - enable this option if you want to allow customers apply store credit currency on taxes.

Allow applying Store Credit on Shipping - set to Yes to enable your customers to apply store credit balance on shipping.

Transactions Log Auto-Cleaning - set to Yes so that records older than the specified period would be automatically deleted.

Please note that **Transactions Log Auto-Cleaning** and **Auto-Cleaning Period (Days)** functionality is available as part of an active product subscription or support subscription. For more information about Transaction Logs see [magento_2:store-credit-and-refund#transaction_logs](#)
Enabling **Transactions Log Auto-Cleaning** will remove entries from both the customer page in the admin area and the customer account.

Auto-Cleaning Period (Days) - set the number of days after which records will be automatically removed.

Use **One Step Checkout** to timely remind your customers of one more payment option and ensure a seamless process.

Product Creation

To create a store credit product please go to **Products → Catalog** → click on the **Add Product** button and select the **Store Credit by Amasty** product type in the dropdown.

The screenshot shows the 'Products' management page in Magento 2. The 'Add Product' button is highlighted in orange, and its dropdown menu is open, showing various product types. 'Store Credit by Amasty' is selected and highlighted in grey. Below the dropdown, a table lists existing products with columns for ID, Thumbnail, Name, Type, Attribute Set, SKU, Price, Quantity, Salable Quantity, Visibility, and Status. Two products are visible: 'Aim Analog Watch' and 'Endurance Watch', both of type 'Simple Product'.

Store Credit Product Settings

Store Credit product settings include the same options as other product types except for Prices settings. To set store credit price and possible pricing options, expand the **Amasty Store Credit Prices** tab.

Amounts - You can set a fixed price for a store credit product.

The specified prices will be displayed on the frontend product page.

Other amount:

To add even more flexible pricing options, you may enable **Open Amount**.

Open Amount - Enable the option to let customers specify a custom store credit amount.

Open Amount Min/Max Value - Limit an open amount with min/max values.

Card Value in USD

On the frontend the feature will be displayed in the following way:

Usage Configuration

Configuration
Save Config

Usage Configuration ⌵

Apply Store Credit to Specific Products ▼

[store view] Select 'Yes' to make the store credit applicable to specific products.

Action ▼

[store view]

SKU ?

[store view] Specify a comma-separated list of SKUs the store credit can be applied to.

Category ID ?

[store view] Specify a comma-separated list of category IDs the store credit can be applied to.

Apply Store Credit to Specific Products - enable this setting if you'd like to specify a group of products the store credit can or can't be applied to.

Action - choose whether you'd like the store credit to apply or do not apply to specific products.

SKU - specify a comma-separated list of SKUs the store credit can or can't be applied to.

Category ID - specify a comma-separated list of category IDs the store credit can or can't be applied to.

Configuration
Save Config

Add Tooltip in Store Credit Block ▼

[store view] Add a tooltip in the Store Credit block that will notify customers about details of Usage Configuration.

Tooltip Text

[store view]

Specify the message of the tooltip in this block. Limited to 500 symbols.

Encourage Using Store Credit ▼

[store view]

If set to 'Yes', the system will encourage customers to apply as much store credit as possible.

The inability to apply store credit to the whole cart may be confusing to the customers. That is why

the following settings were implemented:

Add Tooltip in Store Credit Block - enable this setting to display a tooltip in the Store Credit block that will notify customers about details of Usage Configuration.

Tooltip Text - specify the message of your tooltip. Limited to 500 symbols.

Encourage Using Store Credit - set to 'Yes' to encourage customers to use as much store credit as possible. Once enabled, the Store Credit block will be unfolded by default and the maximum possible amount of store credit will be offered to apply.

Email Notification

The extension allows to notify your customers about changes in their Magento 2 credit balance automatically via an email subscription and let them stop notifications.

Email Notification

Enable Store Credit Balance Update Email <small>[store view]</small>	Yes	<input type="checkbox"/>
Send Email Actions <small>[store view]</small>	<ul style="list-style-type: none">Administrator adds to store credit balanceAdministrator removes from store credit balanceOrder refund (paid with store credit)Order place (paid with store credit)Order cancelation (paid with store credit)	
Store Credit Update Email Sender <small>[store view]</small>	General Contact	<input type="checkbox"/>
Store Credit Reply To <small>[store view]</small>	Sales Representative	<input type="checkbox"/>
Email Template <small>[store view]</small>	Amasty Store Credit Customer Notification (Defi	<input type="checkbox"/> Use system value

Enable Store Credit Balance Update Email - choose Yes to enable automatic notifications about the updates in customers' store credit balance.

Send Email Actions - specify the particular actions which you want your customers to be aware of.

Store Credit Update Email Sender - choose your company contact that will be used as an email sender.

Store Credit Reply To - specify the contact for replies.

Email Template - select an email template to be used for notifications.

To use this option, please go to **Marketing → Email Templates** and configure email templates.

Transaction Logs

Please note, this functionality of **Transaction Logs** is available as part of an active product subscription or support subscription after installing the *amasty/module-store-credit-subscription-functionality* module.

To configure the extension, go to **Amasty → Store Credit → Transaction Logs**.

Transactions

Search by keyword 

Actions per page

<input type="checkbox"/>	ID ↓	Customer Name	Customer Email	Date	Transaction	Current Balance	Order ID	Action	Comment
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	Mar 14, 2019 11:41:17 AM	+\$5.00	\$5.00		Added by Admin	Welcome to our webstore!
<input type="checkbox"/>	2	Veronica Costello	roni_cost@example.com	Mar 14, 2019 11:49:08 AM	+\$106.76	\$111.76		Refunded #000000003	
<input type="checkbox"/>	3	Veronica Costello	roni_cost@example.com	Mar 14, 2019 11:50:56 AM	-\$20.00	\$91.76		Order Paid #000000004	
<input type="checkbox"/>	4	Mark Rose	mark@example.com	Mar 14, 2019 12:06:45 PM	+\$5.00	\$5.00		Added by Admin	Welcome to our webstore!
<input type="checkbox"/>	5	Mark Rose	mark@example.com	Mar 14, 2019 12:20:24 PM	+\$53.71	\$58.71		Refunded #000000005	
<input type="checkbox"/>	6	Veronica Costello	roni_cost@example.com	Jul 30, 2021 2:00:28 PM	+\$78.00	\$169.76		Added by Admin	comment

In **Transaction Logs** This section provides detailed reports on customers with store credit and transactions involving store credit, offering comprehensive analytics and insights into its usage by customers.

The Order ID will appear in the Transaction Logs grid only for orders created after installation of the functionality of **Transaction Logs**.

Customers Grid

To find out the information about your customers' balance or to use store credits as various bonuses, go to **Customers → All Customers**.

Customers

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Add New Customer

Search by keyword

Actions 2 records found per page of 1

<input type="checkbox"/>	ID ↓	Name	Email	Group	Phone	Country	Web Site	Confirmed email	Account Created in	Date of Birth	Action
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	United States	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973	Edit
<input type="checkbox"/>	2	Mark Rose	mark@example.com	General	(758)569-7896	United States	Main Website	Confirmation Not Required	Default Store View	Mar 19, 1974	Edit

On the Customers grid you can see the necessary data about each customer.

To check a customer’s balance and refund history, click *Edit* in the **Action** column.

Go to **Store Credit & Refunds** tab.

Veronica Costello

- [← Back](#)
- [Login as Customer](#)
- [Delete Customer](#)
- [Reset](#)
- [Create Order](#)
- [Reset Password](#)
- [Force Sign-In](#)
- [Save and Continue Edit](#)
- [Save Customer](#)

- Billing Agreements
- Product Reviews
- Wish List
- Store Credit & Refunds**

Search [Reset Filter](#) 7 records found per page of 1

Customer Transaction ID ↑	Action	Comment	Balance Change	New Balance	Transaction Date	Admin Name
<input type="text" value="From"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text" value="From"/>	<input type="text" value="From"/>	<input type="text" value="From"/> <input type="button" value="Calendar"/>	<input type="text"/>
<input type="text" value="To"/>			<input type="text" value="To"/>	<input type="text" value="To"/>	<input type="text" value="To"/> <input type="button" value="Calendar"/>	
7	Order Paid #000000008		-\$53.71	\$67.05	Jul 30, 2021, 2:12:59 PM	
6	Order Paid #000000007		-\$5.00	\$120.76	Jul 30, 2021, 2:11:11 PM	
5	Order Paid #000000006		-\$44.00	\$125.76	Jul 30, 2021, 2:04:04 PM	
4	Changed By Admin	comment	+\$78.00	\$169.76	Jul 30, 2021, 2:00:28 PM	

Current Balance - check the balance of each particular account.

Add or subtract a credit value \$ - you can add or subtract an amount from customer's balance by entering a number. For example, enter "99.5" to add \$99.5 and "-99.5" to subtract \$99.5

Comment - give your customers some reasons for adding or subtracting store credit balance.

Visible for Customer - select this option to make the comment visible in the customer account.

Employ **Magento 2 Loyalty Program** extension to create a unique scheme to reward regular customers with exclusive discounts.

On the grid all balance change history is displayed. You can see the type and the number of **Action**, its **Comment**, **Balance Change**, **New Balance**, **Transaction Date** and **Admin Name**.

After the initial installation of **Transaction Logs**, a *reindex action* is required to display the store credit balance on the customer grid.

Credit Memos Grid

To view all credit memos on a separate grid, please go to **Sales → Credit Memos**.

Credit Memos demouser ▾

Search by keyword

Actions ▾ 3 records found 20 ▾ per page < 1 of 1 >

<input type="checkbox"/>	Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refunded	Action
<input type="checkbox"/>	000000001	Mar 11, 2018 4:24:44 PM	000000002	Mar 11, 2018 4:24:43 PM	Veronica Costello	Refunded	\$39.64	View
<input type="checkbox"/>	000000002	Mar 14, 2019 11:49:08 AM	000000003	Mar 14, 2019 11:43:45 AM	Veronica Costello	Refunded	\$0.00	View
<input type="checkbox"/>	000000003	Mar 14, 2019 12:20:24 PM	000000005	Mar 14, 2019 12:05:27 PM	Mark Rose	Refunded	\$0.00	View

Here you can see all the information about the refunded orders, including refunded sums. To see the details about the particular refund, hit the View button at the **Actions** column.

View Memo

[← Back](#)

[Send Email](#)

[Print](#)

Payment & Shipping Method

Payment Information

Check / Money order

The order was placed using USD.

Shipping Information

Flat Rate - Fixed

Total Shipping Charges: **\$5.00**

Items Refunded

Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Minerva LumaTech™ V-Tee	\$32.00	1	\$32.00	\$2.64	\$0.00	\$34.64
SKU: WS08-XS-Blue						
Size: XS						
Color: Blue						

New Memo

To refund orders to store credit, go to **Sales → Orders** and choose the necessary order.

#000000005

 demouser ▾

← Back Send Email **Credit Memo** Reorder

- ORDER VIEW**
- Information
- Invoices
- Credit Memos
- Shipments
- Comments History

Order & Account Information

Order # 000000005 (The order confirmation email was sent)

Order Date	Mar 14, 2019, 12:05:27 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View

Account Information [Edit Customer](#)

Customer Name	Mark Rose
Email	mark@example.com
Customer Group	General

Click the **Credit Memo** button.

New Memo

← Back

Reset

Items to Refund

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Erika Running Short-28-Red SKU: WSH12-28-Red	\$45.00	Ordered 3 Invoiced 3 Shipped 3	<input type="checkbox"/>	<input type="text" value="3"/>	\$135.00	\$11.14	\$0.00	\$146.14
Erika Running Short-29-Green SKU: WSH12-29-Green	\$45.00	Ordered 1 Invoiced 1 Shipped 1 Refunded 1	<input type="checkbox"/>	<input type="text"/>	\$0.00	\$0.00	\$0.00	\$0.00

Update Qty's

With the extension you are able to return items to stock if needed and change items quantity to refund in the **Qty to Refund** section. Click **Update Qty's** to see the current subtotal.

New Memo

Order Total

Credit Memo Comments

Comment Text

Hi Mark,
The amount of the order was refunded to your Store Credit as discussed.

Refund Totals

Subtotal	\$135.00
Refund Shipping	0
Adjustment Refund	0
Adjustment Fee	0
Tax	\$11.14
Store Credit	-\$146.14
Grand Total	\$0.00

Append Comments

Email Copy of Credit Memo

Refund to Store Credit

Refund Offline

Skip to the **Order Total** tab. Here you can specify the amount of **Refund Shipping**, **Adjustment Refund** and **Adjustment fee**. Provide your customer with additional info about the refund via **Comment Text** field.

To refund the order offline, tick **Refund to Store Credit** option. You can cover refund requests with store credit either full or partially.

Send an email copy of credit memo to your customer if needed.

Don't forget to click the **Refund Offline** button to complete the action.

Import and Export Store Credit Data

The Store Credit & Refund for Magento 2 extension includes the built-in functionality for performing one-time imports and exports.

Please note that the **import/export functionality** is only available as part of an active product subscription or support subscription.

First, navigate to **Stores** → **Configuration** → **Amasty Extensions** → **Import/Export** to configure general import/export settings:

- Export
- Import**
- Store Credit

Multi-Process Import

Enable Multi-Process Import [global] 

Number of Parallels Processes [global] 

Advanced

Enable Debug Mode [global]

Enabling this setting will allow detecting errors and display detailed information about them including server errors. Also useful error information can be found in `var/log/amasty_import_debug.log`.

Enable Import without Memory Limit [global]

Enable this setting if import process terminates because of the memory limit exceed.

System Settings

CLI PHP Path [global]

Current CLI PHP path of your Magento which is used by our extension when running the commands directly during the processing of PHP requests. To change it, please run `bin/magento config:set amasty_base/system/cli_php_path %CLI_PHP_PATH%` from the command line.

Export

Import

Store Credit

Multi-Process Export

Enable Multi-Process Export [global] ?

Number of Parallel Processes [global] ?

Advanced

Enable Debug Mode [global]

Enabling this setting will allow detecting errors and display detailed information about them including server errors. Also useful error information can be found in `var/log/amasty_export_debug.log`.

Enable Export without Memory Limit [global]

Enable this setting if export process terminates because of the memory limit exceed.

System Settings

CLI PHP Path [global]

Current CLI PHP path of your Magento which is used by our extension when running the commands directly during the processing of PHP requests. To change it, please run `bin/magento config:set amasty_base/system/cli_php_path %CLI_PHP_PATH%` from the command line.

Check these user guide sections: [Import Settings](#) and [Export Settings](#) for detailed information on general settings of one-time import and export.

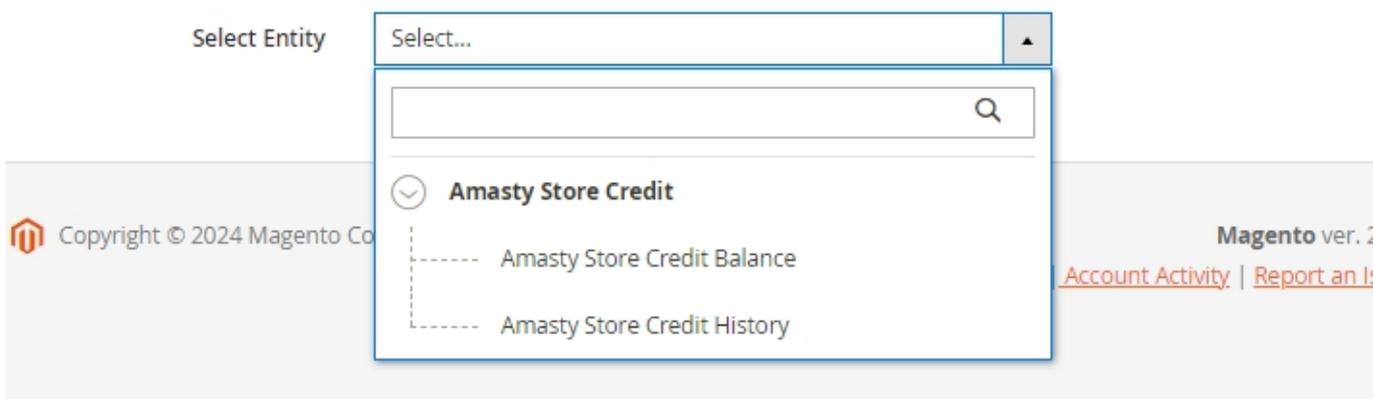
- To import store credit balance or history, go to **System → Amasty Import → Import** and choose the needed subentity of the *Amasty Store Credit* entity to import.

Import

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Download Sample File

Import Settings



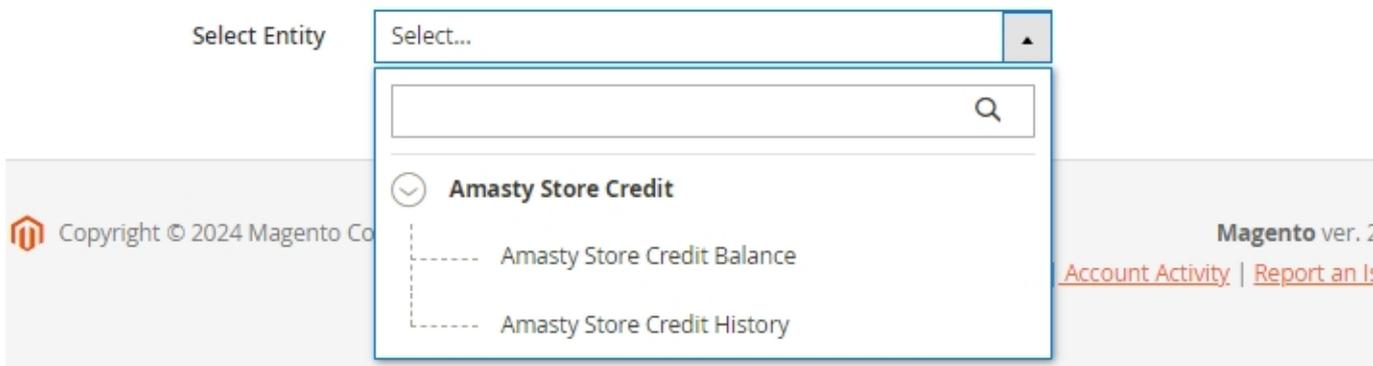
After this, you can configure import settings, including behavior, source, included fields, and more.

- To export store credit balance or history, navigate to **System** → **Amasty Export** → **Export** and select the desired subentity of the *Amasty Store Credit* entity to export.

Export

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Export Settings



After selecting the subentity, you will be able to configure export settings like file type, file encoding, included fields, and more.

You can refer to this user guide section [One-time Import and Export Interfaces](#) to find more detailed descriptions of one-time import/export settings.

Additional packages (provided in composer suggestions)

To make additional functionality available, please install the suggested packages you may need.

Available with **no additional fees**:

- **amasty/module-store-credit-product** - By installing this Amasty_StoreCreditProduct in addition to Amasty_StoreCredit v.1.2.0+, you will get a new feature that will allow (a) your customers to purchase Store Credit as a product from your website and (b) your store managers to place such orders for customers from the admin panel.

Available as a part of an active product **subscription** or support subscription:

- **amasty/module-store-credit-hyva** - Install this package to ensure Store Credit extension works with Hyva Theme.
- **amasty/module-store-credit-product-hyva** - Install this package to ensure Store Credit Product extension works with Hyva Theme.
- **amasty/module-store-credit-hyva-checkout** - Install this package to ensure Store Credit extension works with Hyva Checkout.
- **amasty/module-store-credit-export-entity** - Install this package for Export Store Credits compatibility.
- **amasty/module-store-credit-import-entity** - Install this package for Import Store Credits compatibility.
- **amasty/module-store-credit-subscription-functionality** - Install this package to add detailed reports about customers and transactions involving store credits.

API Methods

It is possible to perform refund via Store Credit using REST API. The following API methods are available:

- `"/V1/invoice/:invoiceId/refund"` method=`"POST"` - to make an automatic refund of used store credits to the balance of the customer
- `"/V1/order/:orderId/refund"` method=`"POST"` - refund that operates as the `"/V1/invoice/:invoiceId/refund"` method=`"POST"`

The refund is made through an additional parameter **"amstorecredit_base_amount"**(optional), which by default is **0**. If no value is provided, only the amount covered by store credits is refunded as store credits while the remaining balance is refunded as regular money.

Store Credit & Refund on the Frontend

Let your customers control their Store Credit. Provide transparent Current balance and History tabs on

their account page.



Search entire store here...



What's New Women Men Gear Training Sale

Account Dashboard

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

Billing Agreements

My Product Reviews

Newsletter Subscriptions

Store Credit & Refunds

Store Credit & Refunds

Store Credit Balance: \$611.87

Transaction Id	Date	Change	New Balance	Action
4	3/11/19	+\$5.00	\$611.87	Changed By Admin Administrator's comment: Happy Birthday!
3	3/11/19	+\$606.87	\$606.87	Refunded #000000010
2	3/11/19	-\$214.85	\$0.00	Order Paid #000000010
1	3/11/19	+\$214.85	\$214.85	Refunded #000000009

4 Item(s)

Show 10 per page

Let your customers spend store credits on purchases.



Payment Method:

Check / Money order

- My billing and shipping address are the same

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
(555) 229-3326

Place Order

Apply Discount Code

Apply Store Credit

You have **\$423.16** on your Store Credit account
Applied store credit amount is \$45.00

Cancel Store Credit

Order Summary

Cart Subtotal	\$54.00
Shipping Flat Rate - Fixed	\$5.00
Tax	\$4.46
Store Credit	-\$45.00

Order Total \$18.46

1 Item in Cart

	Eos V-Neck Hoodie	\$54.00
	Qty: 1	
	View Details	

Find out how to install the Store Credit & Refund for Magento 2 via [Composer](#).

From: <https://amasty.com/docs/> - **Amasty Extensions FAQ**

Permanent link: https://amasty.com/docs/doku.php?id=magento_2:store-credit-and-refund

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