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

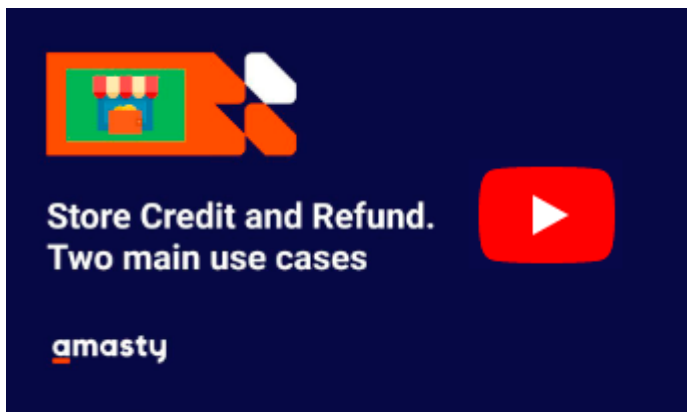
Guide for Store Credit & Refund for Magento 2

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

Configuration

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



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	▼

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.

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

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	▼
Send Email Actions <small>[store view]</small>	Administrator adds to store credit balance Administrator removes from store credit balance Order 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	▼
Store Credit Reply To <small>[store view]</small>	Sales Representative	▼
Email Template <small>[store view]</small>	Amasty Store Credit Customer Notification (Defi	▼

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.

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](#)



 Filters

 Default View ▾

 Columns ▾

 Export ▾

Actions ▾ 2 records found

20 ▾ per page < 1 of 1 >

	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

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

- CUSTOMER INFORMATION
- Customer View
- Account Information
- Addresses
- Orders
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Store Credit & Refunds**

Store Credit

Current Balance \$91.76

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

[Search](#)
[Reset Filter](#)
 3 records found
 per page
 [<](#)
 of 1
 [>](#)

Customer Transaction ID	Action	Comment	Balance Change	New Balance	Transaction Date
From <input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/>	From <input type="text"/>	From <input type="text"/>
To <input type="text"/>			To <input type="text"/>	To <input type="text"/>	To <input type="text"/>
3	Order Paid #000000004		-\$20.00	\$91.76	Mar 14, 2019, 11:50:56 AM
2	Refunded #000000003		+\$106.76	\$111.76	Mar 14, 2019, 11:49:08 AM
1	Changed By Admin	Welcome to our webstore!	+\$5.00	\$5.00	Mar 14, 2019, 11:41:17 AM

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.

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** and **Transaction Date**.

Credit Memos Grid


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

Credit Memos

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  Filters  Default View ▾  Columns ▾  Export ▾

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

	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

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[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 SKU: WS08-XS-Blue Size: XS Color: Blue	\$32.00	1	\$32.00	\$2.64	\$0.00	\$34.64

New Memo

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

#000000005

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← 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.

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

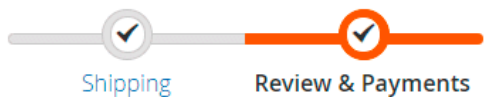
Store Credit Balance: \$611.87

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://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

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



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