

Magento 2 Wallet System Admin Guide

by CedCommerce Docs - Products User Guides

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1. Overview

Magento 2 Wallet System, developed by CedCommerce provides the functionality through which the front-end users can add money to their wallet and then make payment directly using the Wallet Cash.

This is an excellent extension that allows the registered front-end users(customers)to pay for the products or services with one of the most popular payment system. It provides the functionality through which the front-end users can add money to their wallet and then make the online payment directly from their Magento 2 Wallet System extension.

The users can use the Wallet Cash during the checkout process and the applicable amount deducts from their Wallet System. The users can easily credit the required amount to their wallet system by using any debit card or credit card, or bank account.

Key features are as follows:

- Admin can enable or disable the wallet system for each and every user.
- Admin can also add or deduct money from the wallet of every user.
- Wallet System is a kind of online payment method.
- Front-end users can easily credit the required amount to their wallet system and pay for the products or services from their wallet.
- Admin can also refund the amount and credit it to the users' wallet system.
- Admin can view the details of the users using Wallet for making the payment.
- If the order amount is less than the wallet balance, then the user can pay the remaining amount by using any other payment methods.
- On the checkout page, a user can view the wallet cash used and the remaining wallet cash.

2. Wallet System Configuration Settings

Admin has to enable the Wallet System extension to use the functionalities through which the front-end users can credit the required amount to their wallet. Thus, during the checkout process they can make the online payment directly from their Wallet System.

To enable the wallet system configurations

1. Go to the Admin panel.
2. On the left navigation bar, click the **STORES** menu, and then click **Configuration**.
The **Configuration** page appears as shown in the following figure:

Configuration

Store View: Default Config [?] Save Config

Extension Name (version)	License Information	
Magento2_Ced_ShipPerProduct (0.0.2)	cedcommerce	✓
Magento2_Ced_Productfaq (0.0.2)	cedcommerce	✓
Magento2_Ced_Fastway (0.0.1)	cedcommerce	✓
Magento2_Ced_Advancerate (0.0.1)	cedcommerce	✓
Magento2_Ced_HelpDesk (0.0.1)	cedcommerce	✓
Magento2_Ced_SmsaShipping (1.0.0)	cedcommerce	✓

Installed Extensions appear.

- In the left navigation panel, click the **CEDCOMMERCE WALLET** menu. The **Wallet** menu option appears the below as highlighted in the figure.
- Click the **Wallet** menu option.

In the right panel page appears as shown in the following figure:

Configuration

Store View: Default Config [?] Save Config

General Settings

Enable Wallet [global]

- Under **General Settings**, in the **Enable Wallet** list, select **Yes**.
 - Click the **Save Config**
- The configuration is saved and the wallet system feature is enabled.

3. Enable the Wallet System for the Front-end User

Admin has rights to enable or disable the wallet system for each and every front-end user, and also can add or

deduct money from the wallet of every user.

To enable the wallet system for front-end user

1. Go to the **Admin panel**.
2. On the left navigation bar, click the **CUSTOMERS** menu, and then click **All Customers**. The **Customers** page appears as shown in the following figure:

Actions	ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Action
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	General	9876543210	226012	India	Uttar Pradesh	Aug 31, 2017 3:10:55 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Edit
<input type="checkbox"/>	2	akash rai	akashrai@gmx.com	General					Aug 31, 2017 6:28:51 PM	Main Website	Confirmation Not Required	Default Store View				Edit

Note: Admin can enable the Wallet System feature while editing the details of the existing customer or while adding a new customer.

3. Move to the **Action** column of the required customer row.
4. In the **Action** column, click the **Edit** link. The selected customer page appears as shown in the following figure:

5. In the left navigation panel, click the **Account Information** menu. The **Account Information** appears in the right panel.

Veronica Costello

Search 4 demo

← 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
- Billing Agreements
- Newsletter
- Product Reviews
- Wallet Transaction
- Wish List

Account Information

Associate to Website * Main Website ?

Group * General

Disable Automatic Group Change Based on VAT ID

Prefix

First Name * Veronica

Middle Name/Initial

Last Name * Costello

Suffix

Email * @email: roni_cost@example.com

Date of Birth 12/15/1973 📅

Strip Save Card {"customer_save":{"stripe_customer_id":"cus_BL14vOW24dQO"}}

Enable Wallet System Yes

Tax/VAT Number

Amount in Wallet 500

Gender Female

Send Welcome Email From Default Store View

6. In the right panel, under **Account Information**, do the following steps:
 - a. In the **Enable Wallet System** list, select **Yes**.
 - b. In the **Amount in Wallet** box, enter the required amount.
7. Click the **Save Customer** button.

The entered amount is credited in the wallet system of the customer(Front-end user).

4. My Wallet On Front-end View

Only the registered users can make use of wallet. Users can add the amount in the wallet using this feature. At the time of checkout, they can make payment from their wallet. They can view the credit and debit details of the wallet amount.

To view the amount details and add an amount

1. Go to the Front-end panel.
2. Log in the front-end user account.
3. In the left navigation panel, click the **My Wallet** menu.

The **Amount in Wallet** page appears in the right panel as shown in the following figure:

Amount in Wallet: \$ 101830 [Add Amount](#)

ID #	ORDER ID	ACTION	AMOUNT	TIME
2	000000118	Credit	200	2017-11-30 13:40:07
3	000000119	Credit	1000	2017-11-30 13:52:19
4	000000120	Credit	100000	2017-11-30 14:00:23
5	000000121	Credit	400	2017-12-01 04:26:29
6	000000122	Debit	50	2017-12-01 04:45:17
7	000000123	Debit	50	2017-12-01 05:21:02
8	000000123	Credit	50	2017-12-01 05:37:31
9	000000122	Credit	50	2017-12-01 05:41:10

All the amount that is credited to the wallet and debited from the wallet. Users can add the amount to the wallet.

4. To add the amount in the wallet, do the following steps:
 - a. Click the **Add Amount** button.

The **Current Wallet Amount** page appears in the right panel as shown in the following figure:

Current Wallet Amount :\$101,830.00

[Add Money](#)

This page displays the current amount in the wallet and the user can add more amount to the wallet as per the need.

- b. In the box, enter the required amount.
- c. Click the **Add Money** button.

The **Shopping Cart** page appears as shown in the following figure:

Shopping Cart

Item	Price	Qty	Subtotal
 Wallet Pay	\$200.00	1	\$200.00

Summary

Estimate Tax ▼

Proceed to Checkout

- d. Click the **Proceed to Checkout** button.
 The **Payment Method** page appears as shown in the following figure:

✔

Review & Payments

Payment Method:

Credit Card Direct Post (Authorize.net)

Bank Transfer Payment

Check / Money order

[Apply Point for discount](#) ▼

[Apply Discount Code](#) ▼

Order Summary

Cart Subtotal	\$200.00
DiscountPoint	
Order Total	\$200.00
You will earn	8Points
1 Item in Cart ^	
 Wallet Pay	\$200.00
Qty: 1	

- e. Under **Payment Method**, click to select the required payment method.
 The section appears as shown in the following figure:

Check / Money order

wallet new

new york

new york, New York 226021

United States

123654

Edit

Place Order

- f. Click the **Place Order** button.
 The order is placed and the order confirmation message appears as shown in the following figure:

Your order number is: **000000274**.

We'll email you an order confirmation with details and tracking info.

[Continue Shopping](#)

Front-end Panel

My Dashboard

The placed order appears on this page as shown in the following figure:

Account Dashboard

- Account Information
- Address Book
- My Group Gifts
- My Reward Point
- Refer to Friends
- My Orders
- My Downloadable Products
- Stored Payment Methods
- Newsletter Subscriptions
- Billing Agreements

My Dashboard

Recent Orders [View All](#)

Order #	Date	Ship To	Order Total	Status	Action
000000274	12/21/17		\$200.00	Pending	View Order Reorder
000000273	12/21/17		\$300.00	Closed	View Order Reorder
000000261	12/20/17	wallet new	\$0.00	Pending	View Order Reorder
000000260	12/20/17	wallet new	\$0.00	Pending	View Order Reorder
000000258	12/20/17	wallet new	\$0.00	Pending	View Order Reorder

My Orders

The placed order appears on this page as shown in the following figure:

- Account Dashboard
- Account Information
- Address Book
- My Group Gifts
- My Reward Point
- Refer to Friends
- My Orders**
- My Downloadable Products
- Stored Payment Methods
- Newsletter Subscriptions

My Orders

Order #	Date	Ship To	Order Total	Status	Action
000000274	12/21/17		\$200.00	Pending	View Order Reorder
000000273	12/21/17		\$300.00	Closed	View Order Reorder
000000261	12/20/17	wallet new	\$0.00	Pending	View Order Reorder
000000260	12/20/17	wallet new	\$0.00	Pending	View Order Reorder
000000258	12/20/17	wallet new	\$0.00	Pending	View Order Reorder

Admin Panel

Orders

Orders



Create New Order

Search by keyword

Filters Default View Columns Export

Actions 197 records found 20 per page 1 of 10

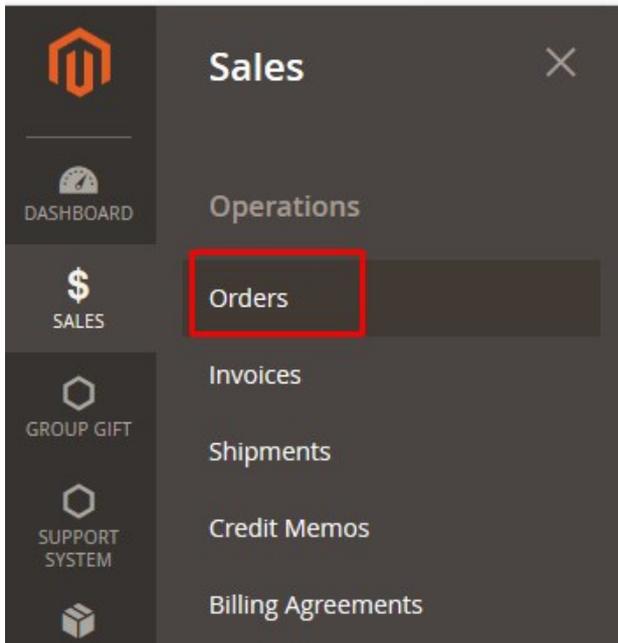
ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000274	Main Website Main Website Store Default Store View	Dec 21, 2017, 21:12:00 PM	wallet new		\$200.00	\$200.00	Pending	View
000000273	Main Website Main Website Store Default Store View	Dec 21, 2017, 15:12:00 PM	wallet new		\$300.00	\$300.00	Closed	View
000000272	Main Website Main Website Store Default Store View	Dec 21, 2017, 11:12:00 AM	wallet 2017	wallet 2017	\$63.00	-\$13.00	Pending	View

5. View Order and Create Invoice From Admin Panel

The admin can view the newly added amount in the form of Order. It appears as other simple orders. The admin can view the customer name and other details of the order. Also, can create invoice and credit memos.

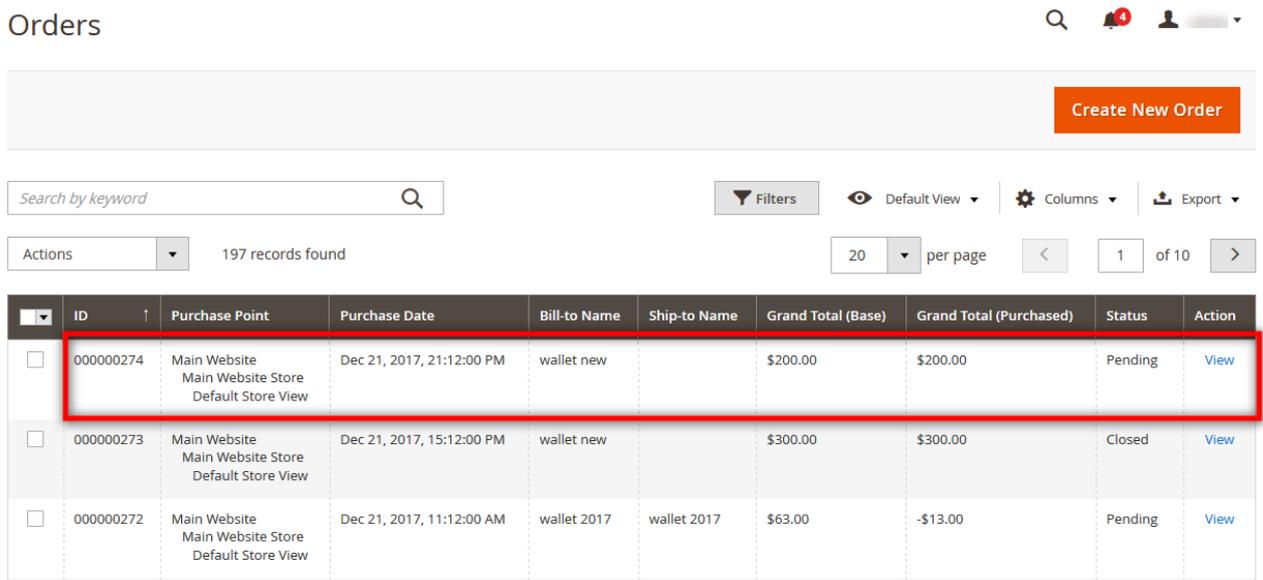
To view the order and create the invoice

1. Go to the Admin panel.
2. On the left navigation bar, click the **SALES** menu.
The menu appears as shown in the following figure:



3. Click **Orders**.

The **Orders** page appears as shown in the following figure:



4. Scroll down to the required pending order.

5. In the **Action** column of the respective order row, click the **View** link.

The order page appears as shown in the following figure:

#000000274



[← Back](#)
[Cancel](#)
[Send Email](#)
[Hold](#)
[Invoice](#)
[Reorder](#)
[Edit](#)

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Comments History

Order & Account Information

Order # 000000274 (The order confirmation email was sent)

Order Date	Dec 21, 2017, 9:28:08 PM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	112.79.169.47

Account Information

Customer Name	[Redacted]
Email	[Redacted].com
Customer Group	General

Address Information

Billing Address [Edit](#)

wallet new
new york
new york, New York, 226021
United States
T: 123654

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Wallet Pay	Ordered	\$100.00	\$200.00	Ordered 1	\$200.00	\$0.00	0%	\$0.00	\$200.00
SKU: wallet_product									

Order Total

Notes for this Order

Status

Comment

- Notify Customer by Email
- Visible on Storefront

[Submit Comment](#)

Order Totals

Subtotal	\$200.00
Grand Total	\$200.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$200.00

- On this page, admin can view all the details and create the invoice.
 6. On the top navigation bar, click the **Invoice** button.
 The **New Invoice** page appears as shown in the following figure:

New Invoice

🔍
🔔 4
👤

← Back
Reset

Order & Account Information

Order # 00000274 (The order confirmation email was sent)

Order Date	Dec 21, 2017, 9:28:08 PM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	112.79.169.47

Account Information

Customer Name	wallet new
Email	walletnew@email.com
Customer Group	General

Address Information

Billing Address [Edit](#)

wallet new
 new york
 new york, New York, 226021
 United States
 T: 123654

Payment & Shipping Method

Payment Information

Check / Money order
 The order was placed using USD.

Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Wallet Pay SKU: wallet_product	\$200.00	Ordered 1	1	\$200.00	\$0.00	\$0.00	\$200.00

Order Total

Invoice History

Invoice Comments

Invoice Totals

Subtotal	\$200.00
Grand Total	\$200.00

Append Comments

Email Copy of Invoice

7. Click the **Submit Invoice** button.

The invoice is created and a success message appears on the specific order page as shown in the following figure:

#000000274 ← Back Send Email Credit Memo Reorder

✓ The invoice has been created.

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Comments History

Order & Account Information

Order # 000000274 (The order confirmation email was sent)

Order Date	Dec 21, 2017, 9:28:08 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	112.79.169.47

Account Information

Customer Name	wallet new
Email	walletnew@email.com
Customer Group	General

Front-end Panel

My Dashboard

After the admin creates the invoice, the status of the order appears as Complete.

My Dashboard

Recent Orders [View All](#)

Order #	Date	Ship To	Order Total	Status	Action
000000274	12/21/17		\$200.00	Complete	View Order Reorder

My Orders

After the admin creates the invoice, the status of the order appears as Complete.

My Orders

Order #	Date	Ship To	Order Total	Status	Action
000000274	12/21/17		\$200.00	Complete	View Order Reorder

My Wallet

Only when the admin creates the invoice, the paid amount is credited in the wallet.

Amount in Wallet: \$ 102030

Add Amount

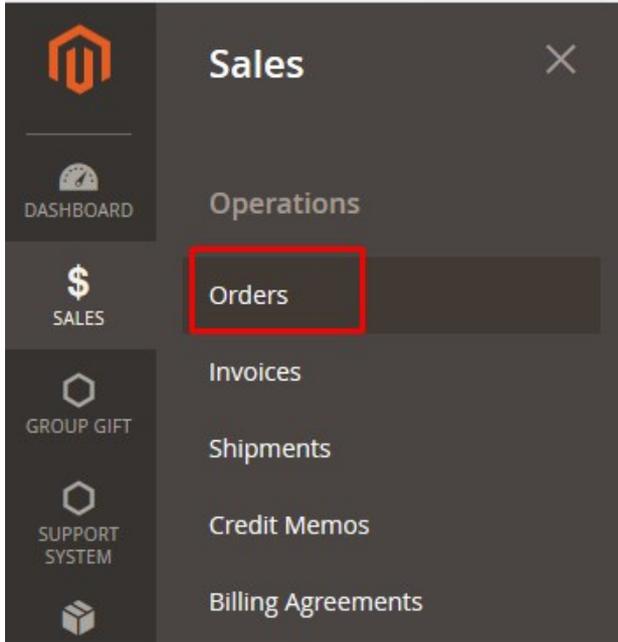
ID #	ORDER ID	ACTION	AMOUNT	TIME
22	000000200	Credit	10	2017-12-18 11:27:50
23	000000201	Credit	10	2017-12-18 11:28:24
24	000000202	Credit	10	2017-12-18 11:28:43
27	000000256	Debit	45	2017-12-20 07:26:10
28	000000257	Debit	45	2017-12-20 07:33:17
29	000000258	Debit	45	2017-12-20 07:44:47
30	000000261	Debit	45	2017-12-20 09:28:21
39	000000273	Credit	300	2017-12-21 10:18:07
40	000000274	Credit	200	2017-12-22 07:22:29

6. Pay To Wallet From Admin Panel

After creating the invoice, the admin can pay the amount to the wallet of the front end user through creating the credit memo.

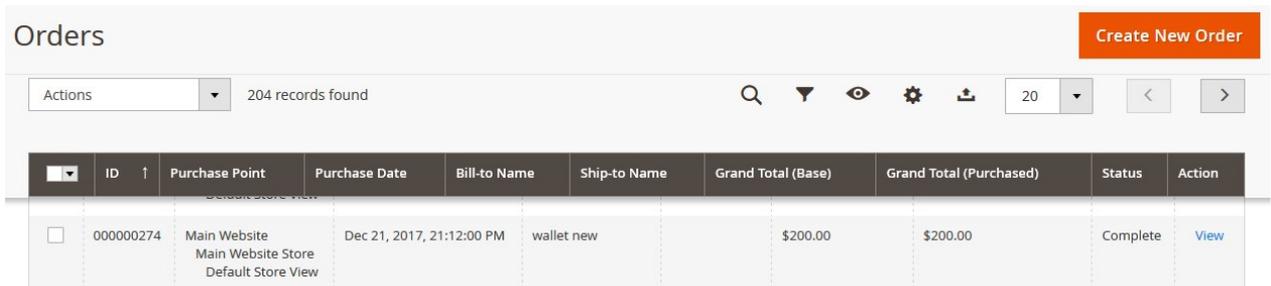
To pay to wallet

1. Go to the Admin panel.
2. On the left navigation bar, click the **SALES** menu.
The menu appears as shown in the following figure:



3. Click **Orders**.

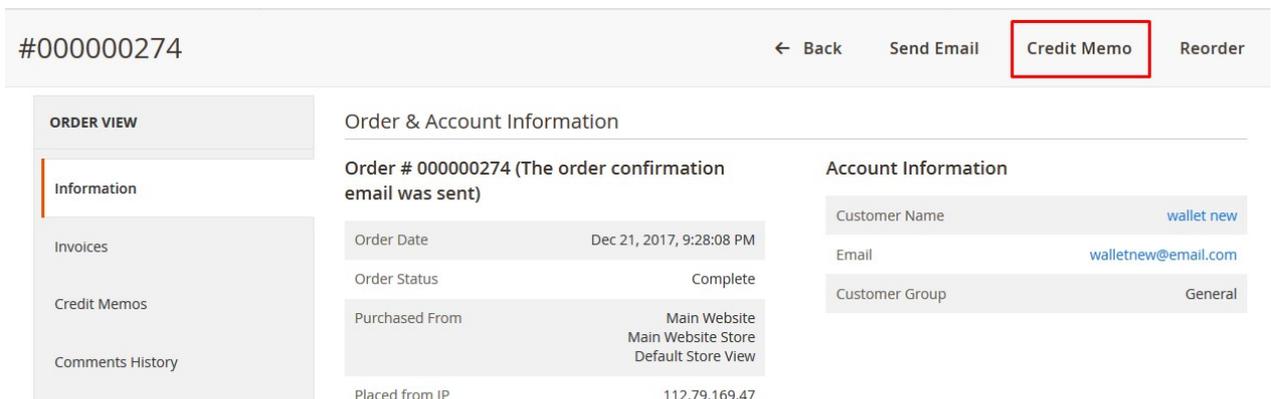
The **Orders** page appears as shown in the following figure:



4. Scroll down to the required complete order.

5. In the **Action** column of the respective order row, click the **View** link.

The order page appears as shown in the following figure:



6. On the top navigation bar, click the **Credit Memo** button.
The **New Memo** page appears as shown in the following figure:

New Memo



← Back Reset

Order & Account Information

Order # 000000274 (The order confirmation email was sent)

Order Date	Dec 21, 2017, 9:28:08 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	112.79.169.47

Account Information

Customer Name	wallet new
Email	walletnew@email.com
Customer Group	General

Address Information

Billing Address [Edit](#)

wallet new
new york
new york, New York, 226021
United States
T: 123654

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Items to Refund

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Wallet Pay SKU: wallet_product	\$200.00	Ordered 1 Invoiced 1	<input type="checkbox"/>	<input type="text" value="1"/>	\$200.00	\$0.00	\$0.00	\$200.00

[Update Qty's](#)

Order Total

Credit Memo Comments

Comment Text

Refund Totals

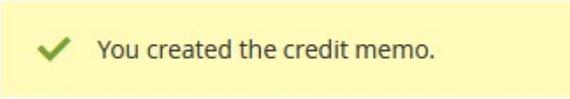
Subtotal	\$200.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	\$200.00

- Append Comments
- Email Copy of Credit Memo

Refund Offline
Pay To Wallet

7. Click the **Pay To Wallet** button.

The credit memo is created and a success message appears.

A yellow rectangular box containing a green checkmark icon and the text "You created the credit memo." data-bbox="155 175 414 193"/>

✓ You created the credit memo.