

# **Customer Credit Limit - User Guide**

by CedCommerce Products Documentation

- 1. Overview ..... 3**
- 2. Product Description ..... 3**
- 3. Outstanding Features of Extension ..... 4**
- 4. General Configuration ..... 4**
- 5. Assign Credit Limit to Customer ..... 4**
- 6. Store Credit Page (Logged In User) ..... 5**
- 7. Customer Purchase via Credit Provided ..... 6**
- 8. Check Credit Limit Update ..... 6**
- 9. Admin Updating the Credit Limit ..... 7**
- 10. Support ..... 8**

## 1. Overview



# CUSTOMER CREDIT LIMIT

## USER GUIDE

### CedCommerce Inc.

This document will explain the feature and functionality of CUSTOMER CREDIT LIMIT extension by CedCommerce for your Magento® Store.

#### **Magento® Editions Compatibility Community – 2.0.x , 2.1.x , 2.2.x**

#### **Confidential Information Notice**

Copyright © CedCommerce 2018 All Rights Reserved. Any unauthorized reproduction of this document is prohibited.

The document and the information it contains may not be reproduced or disclosed to any unauthorized users without the prior written permission from CedCommerce Inc.

## 2. Product Description

The Credit Limit extension facilitates admin to set the credit limit for customers thereby adding payment method “Pay on Account”, that works towards accepting credit orders. The customer can place an order via “Pay on Account” payment method as long as he does not exceeds the credit limit. This Feature allows a merchant to brand their Store Credit as their own.

When we talk about a B2B business where bulk purchasing is done, allowing your customers to purchase goods keeping in terms with your approved credit limit, plays a major role in uplifting your business.

Credit limit 2.x adds a payment method “Pay on Account”, which is used to accept credit orders. If a customer exceeds the credit limit provided to him by the admin, the customer can no longer order with the “Pay on Account” method, Credit Limit exceeds limit message is shown on the Checkout page. With our Credit Limit Extension, even customers can keep a track of their available credit.

### 3. Outstanding Features of Extension

#### For Customers:

- Use Store Credit Limit provided to him to pay for his order
- A customer can check the details of their Used and Remaining limit
- Refund for the product ordered via credit limit is easily managed for the customer.

#### For Admin:

- Select the customer whom to award the Credit Limit
- View the list of customers who are using the Credit Limit feature
- Manually Add or Subtract Credit for Customers
- Refund for the product ordered via credit limit is easily managed for the customer.

#### Benefit:

- 100% open source
- Easy Installation and Extension Configuration Process
- User-friendly interface

### 4. General Configuration

In order to configure your Credit Limit Extension, login into the Magento administrative panel, and select *Stores > Configuration > Credit Limit*

#### Customer Credit Limit



Enable Customer Credit Limit Option  
[website]

**Enable Customer Credit Limit Option** to **YES** to enable the feature for your store.

### 5. Assign Credit Limit to Customer

To configure the Credit Limit for any customer admin need to assign the credit amount for each customer individually as per the history. He can even close the feature for any of the individual customers any time.

To assign the credit limit to any customer, admin can navigate to **Customer < Credit Limits < Add Credit Limit**

[← Back to register or connect an account](#)   [Reset](#)   [Save and Continue Edit](#)   [Save](#)

**MANAGE CREDIT LIMIT**

---

Credit Limit

---

Customer

**Credit Limit**

---

Credit Limit \*

### ***Adding the Credit Limit Amount***

[← Back to register or connect an account](#)   [Reset](#)   [Save and Continue Edit](#)   [Save](#)

**MANAGE CREDIT LIMIT**

---

Credit Limit

---

Customer

Search   [Reset Filter](#)   2 records found   20 per page   < 1 of 1 >

	ID#	First Name	Last Name	Email
<input type="checkbox"/>	1	Veronica	Costello	roni_cost@example.com
<input checked="" type="checkbox"/>	2	Naved	Siddiqui	navedsiddiqui@cedcoss.com

### ***Selecting the Customer to whom to provide the Credit Limit***

Now the Credit limit to the customer has been provided and he can purchase the product from a store for a certain amount.

Admin can also track the customer Credit details (*Credit Amount Provided / Used Credit Amount / Remaining Credit Amount*)

## **6. Store Credit Page (Logged In User)**

To view the credit limit customer can check his details from the My Account option and then move to the Credit Limit tab.

Here he can view all the information regarding his total credit that was provided by the admin, how much credit he has utilized and the credit that has been left.

A customer can also view all of his order placed via credit limit option, and track the details for that.

## Credit Limit

- Account Dashboard
- My Orders
- My Downloadable Products
- My Wish List

---

- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements

---

- My Product Reviews
- Newsletter Subscriptions
- Credit Limit

**Total Credit Limit**

Your total credit limit is: \$100.00

**Used Credit Limit**

Your used credit limit is: \$50.00

**Available Credit Limit**

Your available credit limit is: \$50.00

**Order Placed By Credit Limit**

Order #	Date	Ship To	Order Total	Status	Action
000000004	7/12/18	Naved Siddiqui	\$50.00	Order Placed By Credit Limit	<a href="#">View Order</a>   <a href="#">Reorder</a>

1 Item Show  per page

## 7. Customer Purchase via Credit Provided

If a customer has been assigned with the Credit Limit, the Credit component will display the payment method at the time of checkout. If the customer does not have a Credit balance, the component will not display.



✓

✓

Shipping
Review & Payments

Payment Method:

Pay by Credit Amount

My billing and shipping address are the same

Naved Siddiqui  
GomtiNagar  
Lucknow, Uttar Pradesh 226022  
India  
[9519646951](#)

[Place Order](#)

---

Check / Money order

[Apply Discount Code](#) ▾

**Order Summary**

Cart Subtotal	\$19.00
Shipping Flat Rate - Fixed	\$5.00
<b>Order Total</b>	<b>\$24.00</b>

1 Item in Cart ▾

Ship To: ✎

---

Naved Siddiqui  
GomtiNagar  
Lucknow, Uttar Pradesh 226022  
India  
[9519646951](#)

## 8. Check Credit Limit Update

## Credit Limit

- Account Dashboard
- My Orders
- My Downloadable Products
- My Wish List

---

- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements

---

- My Product Reviews
- Newsletter Subscriptions
- Credit Limit

**Total Credit Limit**

Your total credit limit is: \$100.00

**Used Credit Limit**

Your used credit limit is: \$74.00

**Available Credit Limit**

Your available credit limit is: \$26.00

### Order Placed By Credit Limit

Order #	Date	Ship To	Order Total	Status	Action
000000004	7/12/18	Naved Siddiqui	\$50.00	Order Placed By Credit Limit	<a href="#">View Order</a>   <a href="#">Reorder</a>
000000005	7/12/18	Naved Siddiqui	\$24.00	Order Placed By Credit Limit	<a href="#">View Order</a>   <a href="#">Reorder</a>

2 Item(s) Show  per page

**Note:** To clear the credit amount used by the customer, he needs to pay via offline method to the admin and then admin updates his detail in the system, therefore, his limit is refreshed again.

## 9. Admin Updating the Credit Limit

When the customer makes the payment for his outstanding credit limit to the admin via any offline method, then the customer needs to update the detail in the panel.

[Add Credit Limit](#)

Filters
Default View
Columns

20 per page
 <
1 of 1
 >

ID	Customer Email	Credit Amount	Used Credit Amount	Remaining Amount	Action	Pay Action
<input type="checkbox"/> 1	roni_cost@example.com	\$150.00	\$111.76	\$163.24	<a href="#">Edit</a>	<a href="#">Pay Amount</a>
<input type="checkbox"/> 2	navedsiddiqui@cedcross.com	\$100.00	\$74.00	\$26.00	<a href="#">Edit</a>	<a href="#">Pay Amount</a>

*Customer < Credit Limit < Pay Amount*

← Back to register or connect an account
Reset
Save

**MANAGE BALANCE**

Manage Balance ✎

### Manage Balance

**Total Limit**

**Credit Balance**

**Paid Amount** \*

**Trfansaction Id**

Customer now updates the client payment for future tracking

← Back to register or connect an account    Reset    Save and Continue Edit    **Save**

---

**MANAGE CREDIT LIMIT**

Credit Limit

Customer

**Paid History**

Search    [Reset Filter](#)    2 records found

20 per page    <    1 of 1    >

ID#	Paid Amount	Transaction_id
<input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>
6	\$74.00	9519646951_1

From the **Paid History** Tab admin can check all the payment made by a customer to clear his outstanding credit history.

## 10. Support

If you need any further support or have any questions directly related to Credit Limit extension, please use our Online Message Form to contact us or send us an email at [support@cedcommerce.com](mailto:support@cedcommerce.com)

**Best Regards,**

**CedCommerce Team**