PARTIAL PAYMENT – M2

USER MANUAL

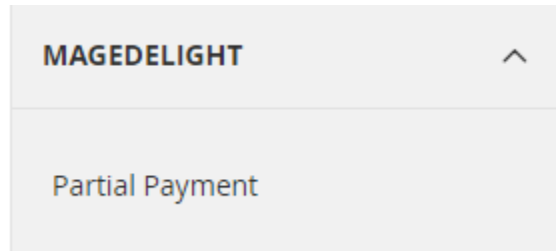## License Key

After successful installation of Partial Payment extension by using the Magento setup, you are now required to configure the license key in the admin configuration section. You can set it from:

Admin > Store > Configuration > MageDelight > Partial Payment > License Configuration As shown in screenshot below:

You will find two text boxes asking for Serial Key and Activation Key, which you can find in the email you received upon the purchase of extension. See screenshot below:
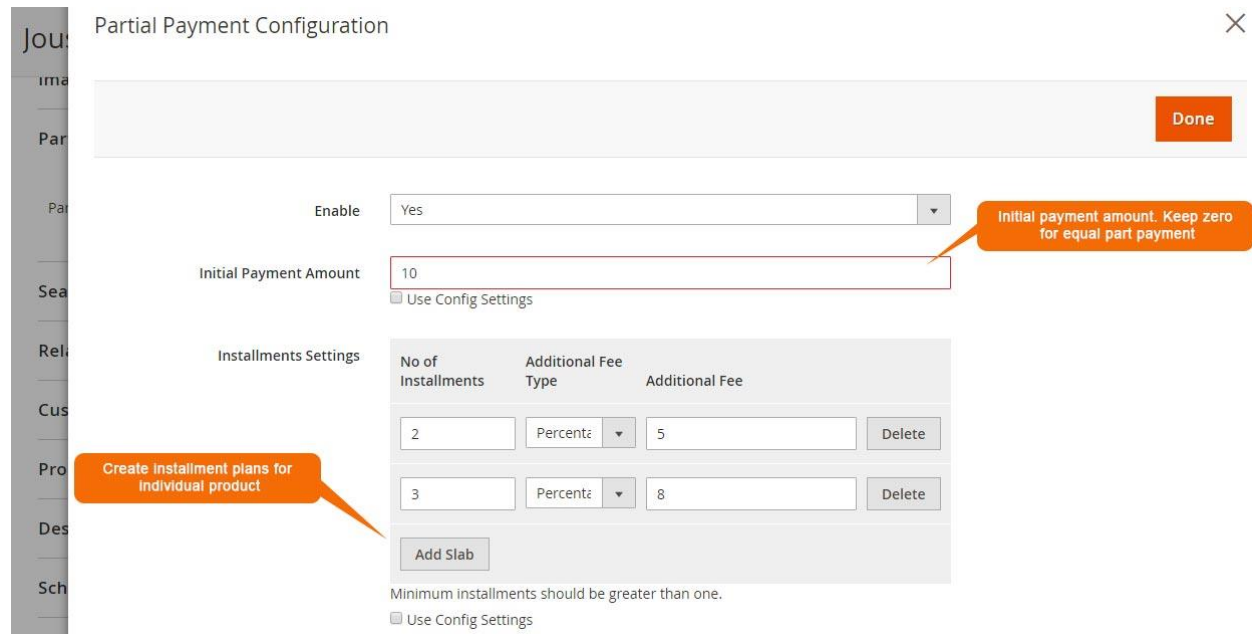
Backend (Admin side) Partial Payment

Manage Partial Payment Options for Products

Once you successfully install and configure the extension with your Magento setup, you will be provided with the options to manage partial payment for each product. You will be able to see the new tab called **Partial Payment Information**. By default, partial payment option is disabled for all products. However, the admin can manually enable the products for which enabling is required.

Under this tab you will find various configuration options as below. Check the below screenshot:

If you want to enable partial payment for all products, you can also use mass action to change this attribute value for all the products.

Enable: Allow Partial Payment for particular product.

Initial Payment Amount: This would be the first installment that the customer would pay as partial payment. This amount would be charged at time of checkout as upfront. The remainder amount would be divided into equal parts by the number of remaining installments.

Installment setting

> **No. of Installments**: This is number of installments that can be set for a particular product. First time payment would be consider as first payment.
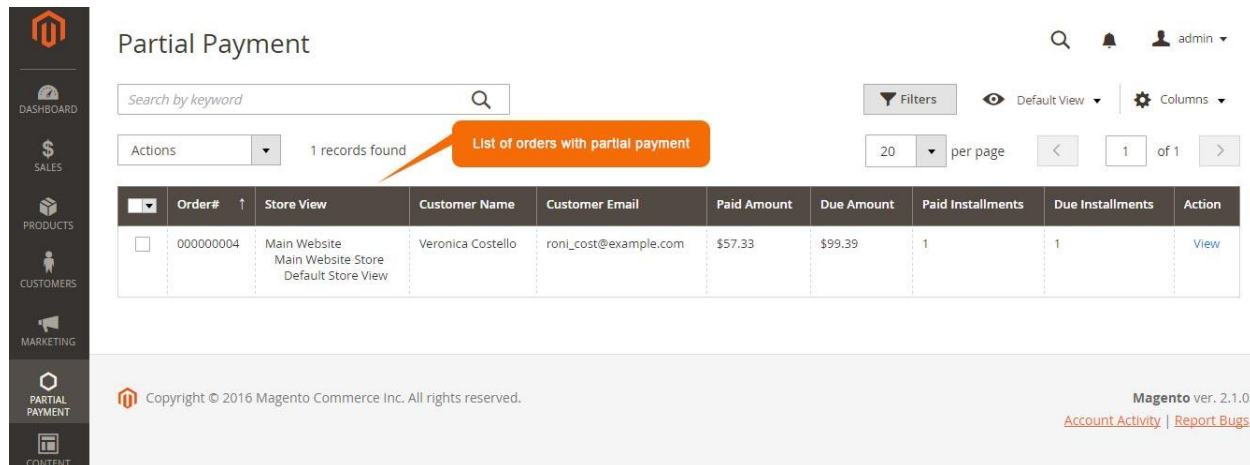
> **Additional Fee type**: This can be percentage/fix amount you add to next filed.

> **Additional Fee**: This would be additional charge to user partial payment options. We can consider it as charges/fees to use the Partial Payment option.

Along with each option, there is a check box called "Use Config Settings". While this check box is checked, the related particular values will be used from the admin configuration settings for partial payment.

Manage Partial Payment

This is one of the main areas of the extension, which allows the Admin to manage all the partial payments for each order and item. This area will list all the order details placed by using the Partial Payment, with the necessary basic information for each order as show in below screenshot:

Each of the detailed page will includes all the details about the partial payment. This will allow the admin full control for partial payment. Using this feature, the admin can:

- Send installment schedule.
- Send reminder for installment.
- Admin can make payment of installment.
- Update the payment status.

Send installment schedule: If customer requests the installment schedule, then the admin can send the admin schedule to customer. This feature sends an email to the customer with all required details for the installment, due dates, and paid installment status.

Send reminder for installment: This Extension allows us to send a reminder email before a pre-decided number of days defended by the admin from admin configuration. Still in some case, if a customer has not paid a particular installment, the admin would require to send a reminder for the particular installment. This email will have installment schedule with the highlighted installment for which the admin is sending a reminder.

Update Payment Status: With some of the payment methods, the admin has to confirm the payment manually. This especially applies to payment methods such as check / Money order, Cash on Delivery, and Credit Card.

Some times with PayPal Website Payments Standard, we require to require to confirm if server has received the IPN notifications or not, even if the client has paid for it. In such a scenario, the admin can confirm the payment form here as show in the screenshot below:

Make Payment for installation: This option allows the customer to make the payment for the installment via all supported payment methods as shown in the above screenshot.

When the installment is paid and payment is confirmed, (whether the installment is paid by the customer or keyed in by the admin), the particular order will get updated with the installment amount.

Partial Payment Admin configuration

These are the general configurations that are available with the Partial Payment extension, here you can setup the global values, email templates, or you can even disable the partial payment extension if required.

Products General Configuration

1. **Enable Partial Payment On Frontend**
   This can enable/disable the Partial Payment option at the frontend globally.
2. **Additional Payment Amount Type**
   Here, you can manage the additional payment for all the products, which are checked in the user configuration setting. This can be a Fixed/Percentage value.
3. **Additional Payment Amount**
   If additional payment type is set to

- o Percentage, then this field should content value from 1 to 100 only. This amount reflects the additional charges in percentage value for the particular product price, for all products.
- o Fixed, then the added amount will be charged as fix price added here for all the products.

4. **Initial Payment Amount Type**
   Here you can manage the initial payment for all the products that are checked in the user configuration settings. This can be Fixed/Percentage.

5. **Initial Payment Amount**
   If Initial payment type is set to
   - o Percentage, this field should contain a value from 1 to 100 only. This will be the initial payment amount in percentage price for all products.
   - o Fixed, added amount will be charged as fix price added here for all the products.
   This will be the first installment with partial payment checkout.

6. **Frequency of Payment**
   Can set the frequency of the installment to be paid for a particular item as weekly, monthly or quarterly.

7. **Terms and Conditions**
   Can select the terms and conditions (which are created under admin > sales > terms and condition section). Selected T&C will be visible on product detail page as T&C to use Partial Payment.

8. **No. Of Installments**
   Set the number of installments for partial payment.

9. **Allowed Customer Groups**
   Select the customer groups to be allowed for the partial payment.

Another section under the admin configuration is the "Email configuration setting", where you can manage the email template, Email recipient and email copy that needs to send on a particular customer's email address for installment schedule, installment reminder and payment status email.

Admin can also setup the number of days before admin needs to send installment reminder email to the customer. As shown in the below screenshot:

Configuration

Q   🔔   👤 admin ▾

GENERAL ⌄

CATALOG ⌄

CUSTOMERS ⌄

MAGEDELIGHT ⌃

　　Cybersource Settings

　　Authorize.net CIM Settings

　　Partial Payment

　　Stripe Payment

SALES ⌄

SERVICES ⌄

ADVANCED ⌄

Partial Payment configuration setting

General

Enable Partial Payment On Frontend
[store view]
| Yes | ▾ |

Initial Payment Amount Type
[store view]
| Fixed | ▾ |

Initial Payment Amount
[store view]
| 10 |

Initial payment amount for default setting

Frequency of Payment
[store view]
| Weekly | ▾ |

Payment frequency weekly, monthly, Quarterly

No. Of Installments
[store view]

No of Installments	Additional Fee Type	Additional Fee	Action
2	Fixed ▾	10	🗑
3	Fixed ▾	20	🗑

Set installment plan for default setting

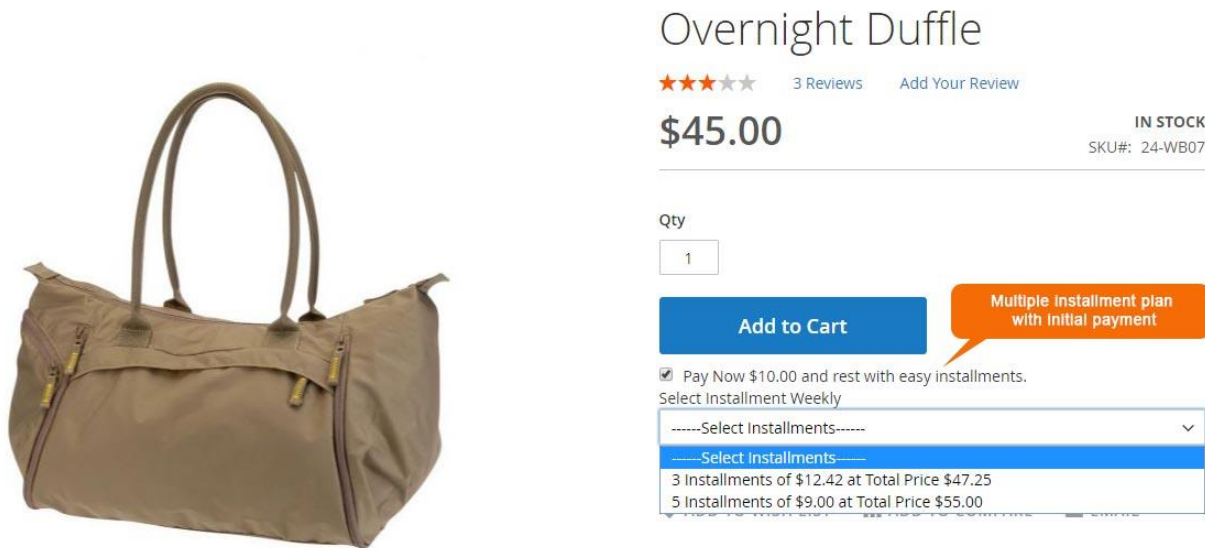| Add |

Allowed Customer Groups
[store view]

| NOT LOGGED IN |
| General |
| Wholesale |
| Retailer |

Allowed customer groups for partial payment
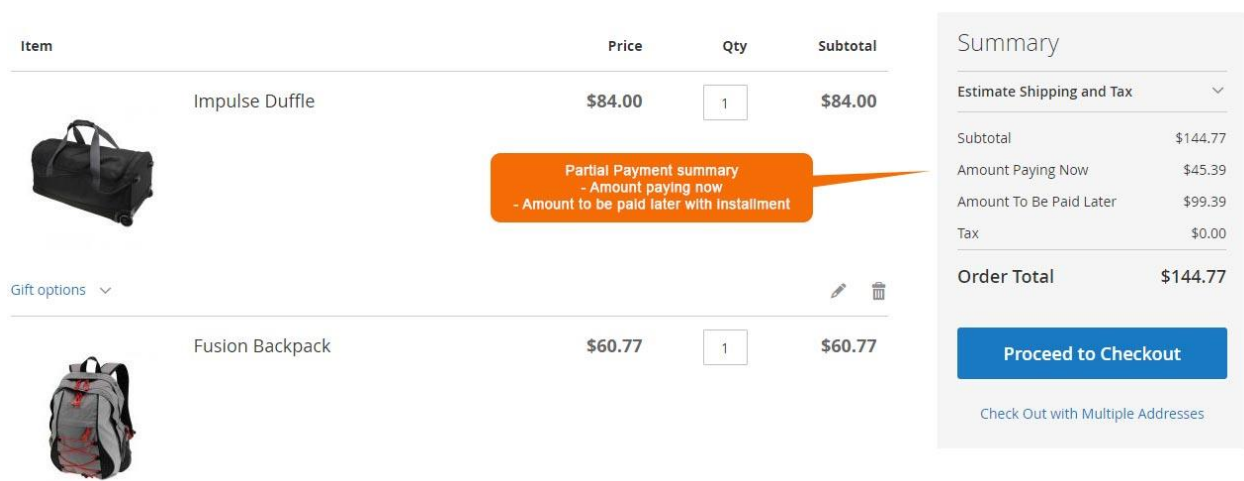
Frontend Partial Payment

Once you have configured the partial payment extension and set the product value for partial payments, the allowed customer group user can see the options for partial payment at the frontend. On the product detail page, the customer gets the checkbox option to check i.e. opt for the product using partial payment. As shown in the below screenshot:

On the product detail page, customer gets the option for pay in installments if the partial payment option is enabled for particular product.

If customer has added a product to cart using the 'pay with installment' option, the cart will manage initial payment and installment to be paid later, based on the partial payment settings, as show in the below screenshot,
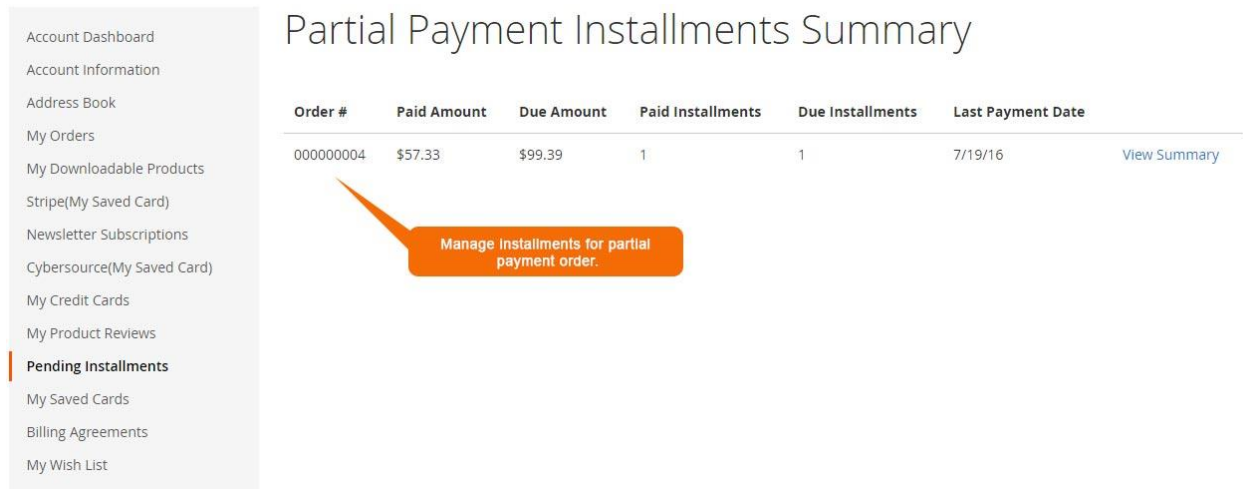
As you can see in the above screenshot, the grand total is 581 USD, paying now amount is 91 USD, and to be paid later is 500 USD. So the 91 USD will be the initial payment amount, or in other words we can say the first installment of the partial payment is now paid.
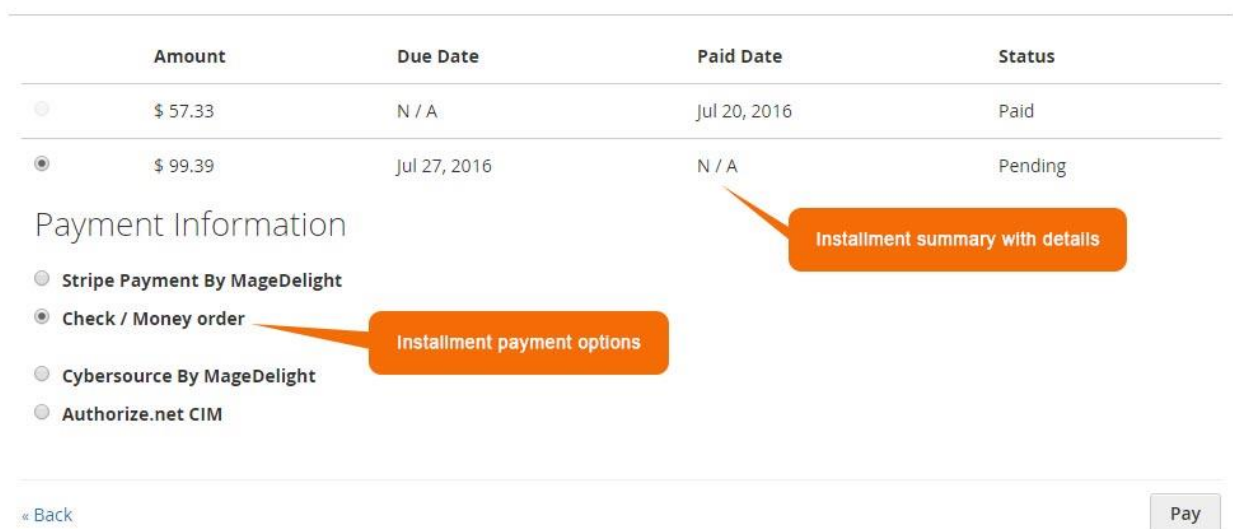
Once the customer checks out by paying the partial payment, the customer now comes across a new section called Pending Installments, where customer can review all his partial payment order items, and manage payment for same as shown in the below screenshot,

Partial Payment Installments Summary

Account Dashboard
Account Information
Address Book
My Orders
My Downloadable Products
Stripe(My Saved Card)
Newsletter Subscriptions
Cybersource(My Saved Card)
My Credit Cards
My Product Reviews
Pending Installments
My Saved Cards
Billing Agreements
My Wish List

Order #	Paid Amount	Due Amount	Paid Installments	Due Installments	Last Payment Date	
000000004	$57.33	$99.39	1	1	7/19/16	View Summary

Manage Installments for partial payment order.

On the detail page of the particular installments, the customer will be able to see the installment schedule, payment status, and then he can pay when required with the allowed payment methods. Once the payment is confirmed, the customer will get the payment receipt for particular installment and the order will be updated with the paid amount. Please check below screenshot:

Installment Summary for Order # 000000004

	Amount	Due Date	Paid Date	Status
○	$ 57.33	N / A	Jul 20, 2016	Paid
⦿	$ 99.39	Jul 27, 2016	N / A	Pending

Installment summary with details

Payment Information

○ **Stripe Payment By MageDelight**
⦿ **Check / Money order**   Installment payment options
○ **Cybersource By MageDelight**
○ **Authorize.net CIM**

« Back   Pay