

Loan Credit Extension

User Manual



Magento 2 Loan Credit Extension by MageComp let store owner give virtual credit to their store customers using which they can quickly purchase the products and settled their account later.

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1. Extension Installation Guide

- Go to My downloadable products. The file that you download normally is a zip file.
- Use FTP client (such as Filezilla, WinSCP, cuteFtp) to upload or copy all folders in the zip package to your Magento site root folder. This will not overwrite any existing files, just add new files to the folder structure.
- Open Command line in folder root of Magento and run following command respectively:
 - php bin/magento setup:upgrade
 - php bin/magento setup:static-content:deploy
 - php bin/magento indexer:reindex
 - php bin/magento cache:flush
- Navigate to Stores/Configuration, if you can see the extension tab, it is installed properly.
- If you need professional help regarding [Magento Extension Installation](#), Feel free to contact us any time.

2. Configuration

Once you have successfully installed the extension, go to **Store → Configuration** to configure the extension for use.

- **Enabled:** Option to enable or disable extension.
- **Title:** Set Loan Credit title to display in store frontend.
- **New Order Status:** From here you can assign new order status.
- **Payment from Applicable Countries:** You can use this option to enable loan credit payment method for all or selected countries as per business need.
- **Payment from Specific Countries:** If you want to enable loan credit payment method for specific countries, you can make countries selection from here.
- **Minimum Order Total:** Using this option, you can set minimum Order total to enable Loan Credit Payment method for customers.
- **Maximum Order Total:** Enter maximum Order total amount to enable Loan Credit Payment method for customers.
- **Sort Order:** You can assign sort order to display Proxy Pay on the top of all Payment methods.

Loancredit

Enabled [website] Yes Enable or disable extension from here

Title [store view] Loancredit Payment Method Set Loan Credit title to display on Frontend

New Order Status [website] Pending Select new default order status

Payment from Applicable Countries [website] All Allowed Countries

Payment from Specific Countries [website]

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua & Barbuda

Select countries or enable Loan Credit method applicable for all.

Minimum Order Total [website]

Maximum Order Total [website] Set minimum and maximum order total amount for Loan Credit if needed.

Sort Order [website] Set sort order if needed

3. Backend Grid for Customer Loan Requests

Once you have configured the extension properly from the store backend, your customer will be able to make loan credit request from the store frontend. The extension is designed to collect all customer Loan Credit Request and it will automatically be listed in this backend grid.

Customer Loan Requests Backend Grid to collect Loan Credit Requests from Customers.

Search by keyword

Filters Default View Columns Export

Actions 2 records found 20 per page 1 of 1

| <input type="checkbox"/> | Customer Name | Customer Email | Loan Reason | Loan Amount | Loan Status |
|--------------------------|---------------|--------------------------|--------------------------------------|-------------|-------------|
| <input type="checkbox"/> | Amy Blake | amyblakehWX@magecomp.com | Just for fun | 250.0000 | Pending |
| <input type="checkbox"/> | MageComp Test | test.magecom@gmail.com | We will settled at the end of month. | 500.0000 | Pending |
| <input type="checkbox"/> | John Doe | Johndoe@magecomp.com | Because need product in urgency | 100.0000 | Approve |

You can use grid option to accept customer loan request if needed .

Customer Loan Requests

Success message for customer request approval

Columns ▾
Export ▾

✓ Total 1 Loan Credit Requests is Approved.

Actions ▾
Approve

You can Approve one or more customer's Loan Credit Requests at Once

20 per page
 <
1 of 1
 >

| | Customer Name | Customer Email | Loan Reason | Loan Amount | Loan Status |
|-------------------------------------|---------------|--------------------------|--------------------------------------|-------------|-------------|
| <input type="checkbox"/> | Amy Blake | amyblakehWX@magecomp.com | Just for fun | 250.0000 | Pending |
| <input checked="" type="checkbox"/> | MageComp Test | test.magecom@gmail.com | We will settled at the end of month. | 500.0000 | Pending |
| <input type="checkbox"/> | John Doe | johndoe@magecomp.com | Because need product in urgency | 100.0000 | Approve |

4. Assigning Loan Credit Amount to Particular Customer

Using backend option, store admin can easily assign Loan credit amount to specific customer if needed. You will able to find a Loan Credit Amount option under the hood of customer account information in Magento backend.

MageComp Test
← Back
Delete Customer
Reset
Create Order
Reset Password
Force Sign-In
Save and Continue Edit
Save Customer

Customer View

Account Information ✎

Addresses

Orders

Billing Agreements

Newsletter

Product Reviews

Wish List

Associate to Website * Main Website ▾ ?

Group * General ▾

Disable Automatic Group Change Based on VAT ID

Name Prefix

First Name *

Middle Name/Initial

Last Name *

Name Suffix

Email *

Date of Birth 📅

Loan Credit Amount

Enter Loan Credit amount to assign particular Customer.

5. Loan Credit Payment Method in Frontend Checkout

Once you have assigned Loan Credit to your store customers, he or she will be able to place an Order using Loan Credit Payment method. The Loan Credit Payment method will only be displayed in frontend checkout if cart total amount is less than available Loan Credit; otherwise, it will no longer be available for that customer.

Shipping

Review & Payments

Loan Credit Payment method in frontend Checkout

🔍
🛒 1

Payment Method:

Loancredit Payment Method

My billing and shipping address are the same

MageComp Test
 #305, Eva Surbhi Complex, Waghawadi Road
 Bhavnagar, Gujarat 364001
 India
 9898989898

[Place Order](#)

Check / Money order

Order Summary

| | |
|-------------------------------|----------------|
| Cart Subtotal | ₹100.00 |
| Incl. of SGST | ₹7.63 |
| Incl. of CGST | ₹7.63 |
| Shipping Flat Rate - Fixed | ₹5.00 |
| Incl. of Shipping SGST | ₹0.38 |
| Incl. of Shipping CGST | ₹0.38 |
| Order Total | ₹105.00 |
| 1 Item in Cart | ▼ |

Loan Credit Payment Method in Frontend Order View

Once customer have place an Order using Loan Credit Payment method, they will find Loan Credit Payment under Payments tab.

Loan Credit Payment method in Frontend Order View

Order # 000000001

PENDING

December 5, 2018

[Reorder](#)

[Print Order](#)

Items Ordered

| Product Name | SKU | Price | Qty | CGST | | SGST | | IGST | | Subtotal |
|--------------|-------------|---------|------------|------|--------|------|--------|------|--------|----------|
| | | | | Rate | Amount | Rate | Amount | Rate | Amount | |
| Loancredit1 | Loancredit1 | ₹100.00 | Ordered: 1 | 9 | ₹7.63 | 9 | ₹7.63 | 0 | ₹0.00 | ₹100.00 |

| | |
|------------------------|----------------|
| Subtotal | ₹100.00 |
| Incl. of CGST | ₹7.63 |
| Incl. of SGST | ₹7.63 |
| Shipping & Handling | ₹5.00 |
| Incl. of Shipping CGST | ₹0.38 |
| Incl. of Shipping SGST | ₹0.38 |
| Grand Total | ₹105.00 |

Order Information

Shipping Address

MageComp Test
#305, Eva Surbhi Complex
Waghawadi Road
Bhavnagar, Gujarat, 364001
India
T: 9898989898
Buyer GST Number N/A

Shipping Method

Flat Rate - Fixed

Billing Address

MageComp Test
#305, Eva Surbhi Complex
Waghawadi Road
Bhavnagar, Gujarat, 364001
India
T: 9898989898
Buyer GST Number N/A

Payment Method

Loancredit Payment Method

Loan Credit Payment Method in Backend Order View

Loan Credit Payment method in Backend Order View

#000000001

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

Payment & Shipping Method

Payment Information
 Loancredit Payment Method
 The order was placed using INR.

Shipping & Handling Information

Flat Rate - Fixed ₹5.00

Items Ordered

| Product | Price | Qty | Subtotal | Discount Amount | Tax Amount | CGST | SGST | IGST | Row Total |
|---------------------------------------|---------|-----------|----------|-----------------|------------|-------|-------|-------|-----------|
| Loancredit1 | ₹100.00 | Ordered 1 | ₹84.74 | ₹0.00 | ₹84.74 | ₹7.63 | ₹7.63 | ₹0.00 | ₹100.00 |
| SKU: Loancredit1 HSN CODE : N/A | | | | | | 9.00% | 9.00% | 0.00% | |

6. Request Credit Option in Customer Account Section

The extension allows store customer to make a Loan Credit Request at any time from their account section. To identify genuine Customer Loan Credit Request, Customer have to enter reason why they need Loan Credit.

Frontend Customer Loan Credit Request Form

- Account Dashboard
- Account Information
- Address Book
- Request a Credit
- My Orders
- My Downloadable Products
- Newsletter Subscriptions
- Stored Payment Methods
- My Product Reviews
- Billing Agreements
- My Wish List

Request a Credit

Your Credit Balance :

Loan Amount *

Loan Reason *

Submit

Your Customer can Enter Amount and Reason for Requesting Loan Credit if needed.

7. Deactivation of Extension in Case of Emergency

Go to app → etc → config.php and find 'Magecomp_ Loancredit=> 1, and replace 1 with 0.

If something goes wrong, please contact us at <https://magecomp.com/support/>

8. FAQs

- **What if I get “Access denied” error after installation of the extension?**

Whenever you get Access denied error while clicking on the extension tab after installation, log out admin panel and re-login.

Thank You!

Take a look at our other feature rich extensions:



Magento 2 Custom Price Extension allows store admin set minimum product price & let customer enter their own product price to purchase store product.

[Know More...](#)



Magento 2 Proxy pay Extension by MageComp let store owner easily collect payment in Kwanzas (currency of Angola) using References.

[Know More...](#)

VISIT OUR
MAGENTO STORE