

X-Payments: Capturing payments when using X-Payments with Magento 2

Depending on the payment method settings, an order payment via X-Payments may be carried out in either the "Authorize" or the "Authorize and capture" mode.

In a workflow where an order payment is performed in the "Authorize" mode ("Initial transaction = Auth" in X-Payments and/or "Action = Authorize and capture" in Magento), it happens as a two-step process: at the time of order creation, you obtain an authorization for the order grand total amount; later you do a manual capture of the funds to initiate a transfer of the authorized amount from the buyer's account to your account. Note that you are guaranteed these funds only for a limited time (Typically, you have to capture a previously authorized amount within 30 days, but the time may vary by company, so you should check with your payment gateway).

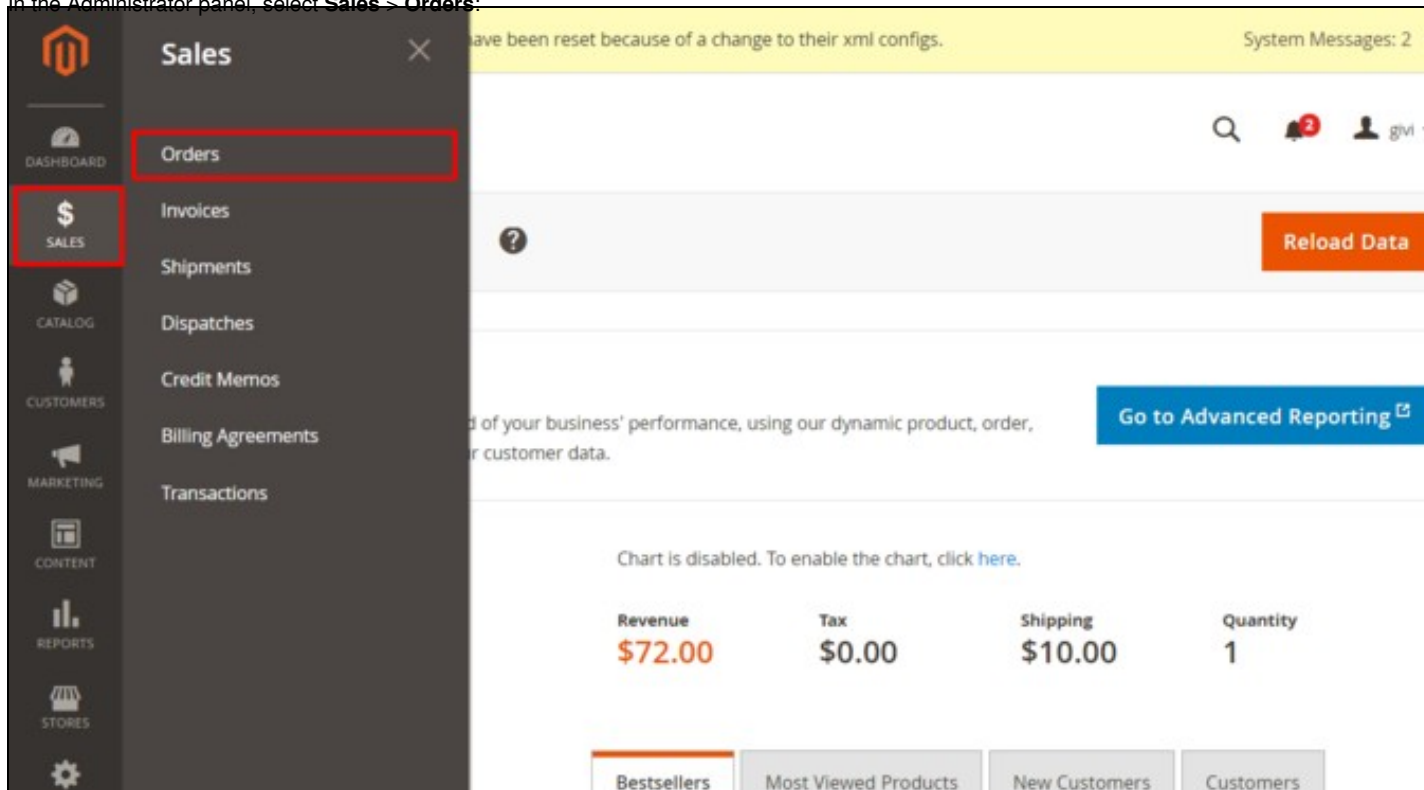
In the "Authorize and capture" mode ("Initial transaction = Auth and capture" in the payment configuration settings in X-Payments and "Action = Authorize and capture" in the X-Payments connector payment method settings in Magento), an authorization and a capture are both performed at once at the time of order creation, so you do not need to worry about manually capturing the funds.

Below we discuss how to capture the funds for which an authorization has been obtained as a result of a buyer making a payment in the "Authorize" mode.

The recommended method to capture a previously authorized amount is based on creating an invoice. If required, multiple invoices can be created for a single order, each containing as many of the purchased items as you specify.

To perform a capture:

1. In the Administrator panel, select **Sales > Orders**:



The screenshot shows the Magento 2 Administrator interface. On the left, a dark sidebar contains a navigation menu with icons and labels for various sections: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, and STORES. The 'SALES' section is highlighted with a red box, and the 'Orders' sub-menu item is also highlighted with a red box. The main content area shows a 'Sales' header with a close button, a search bar, and a notification bell. Below the header, there are several data cards and a table. The table displays financial data for a specific order:

Revenue	Tax	Shipping	Quantity
\$72.00	\$0.00	\$10.00	1

At the bottom of the table, there are four tabs: 'Bestsellers', 'Most Viewed Products', 'New Customers', and 'Customers'. The 'Bestsellers' tab is currently selected.

2. In the Orders table, locate the order for which you want to perform a capture and click to open the order details.

Orders

[Create New Order](#)

Search by keyword

Filters | Default View | Columns | Export

Actions | 6 records found | 20 per page | 1 of 1

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action	Signifyd Guarantee Decision
000000247	Main Website Main Website Store Default Store View	Feb 12, 2018 4:02:13 PM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	View	
000000246	Main Website Main Website Store Default Store View	Feb 11, 2018 9:26:57 AM	Test User	Test User	\$82.00	\$82.00	Processing	Payment method (xpc1)	View	

3. Choose to create a new invoice by clicking the **Invoice** button:

System Messages: 2

#000000247

← Back Cancel Send Email Void Hold **Invoice** Ship Reorder

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments

Order & Account Information

Order # 000000247 (The order confirmation email was sent)

Order Date	Feb 12, 2018, 4:02:13 PM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	128.69.29.130

Account Information [Edit Customer](#)

Customer Name	Test User
Email	
Customer Group	General

This opens a new invoice page:

One or more integrations have been reset because of a change to their xml configs. System Messages: 2

New Invoice

← Back Reset

Order & Account Information

Order # 000000247 (The order confirmation email was sent)

Account Information [Edit Customer](#)

Order Date	Feb 12, 2018, 4:02:13 PM	Customer Name	Test User
Order Status	Processing	Email	testuser@company.com
Purchased From	Main Website Main Website Store Default Store View	Customer Group	General
Placed from IP	128.69.29.130		

4. Scroll down to the **Items to Invoice** section.

New Invoice

← Back Res

Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Gwyn Endurance Tee SKU: WS01-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 2	<input type="text" value="2"/>	\$48.00	\$0.00	\$0.00	\$48.00
Desiree Fitness Tee SKU: WS05-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 1	<input type="text" value="1"/>	\$24.00	\$0.00	\$0.00	\$24.00

Order Total

This section provides a list of items you can invoice and their respective quantities. By default, the invoice will be created for the entire order. If you are going to invoice only some of the items and do a partial capture this time, update the quantities to invoice (specify the correct quantities in the **Qty to invoice** column and click the **Update Qty's** button).

New Invoice ← Back Res

Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Gwyn Endurance Tee SKU: WS01-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 2	<input type="text" value="2"/>	\$48.00	\$0.00	\$0.00	\$48.00
Desiree Fitness Tee SKU: WS05-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 1	<input type="text" value="0"/>	\$24.00	\$0.00	\$0.00	\$24.00

The invoice totals will be re-calculated.

Important: Before using partial capture, make sure your payment gateway supports this feature.

5. Work through the invoicing process as usual: add a tracking number, create a packing slip, enter invoice comments as needed, specify whether a copy of the invoice needs to be emailed to the customer and whether your comments need to be appended to it.
6. In the **Amount** field, select the payment action you require:

New Invoice ← Back Res

Order Total

Invoice History

Invoice Comments

Comments comments comments

Invoice Totals

Subtotal	\$48.00
Shipping & Handling	\$10.00
Grand Total	\$58.00

Amount

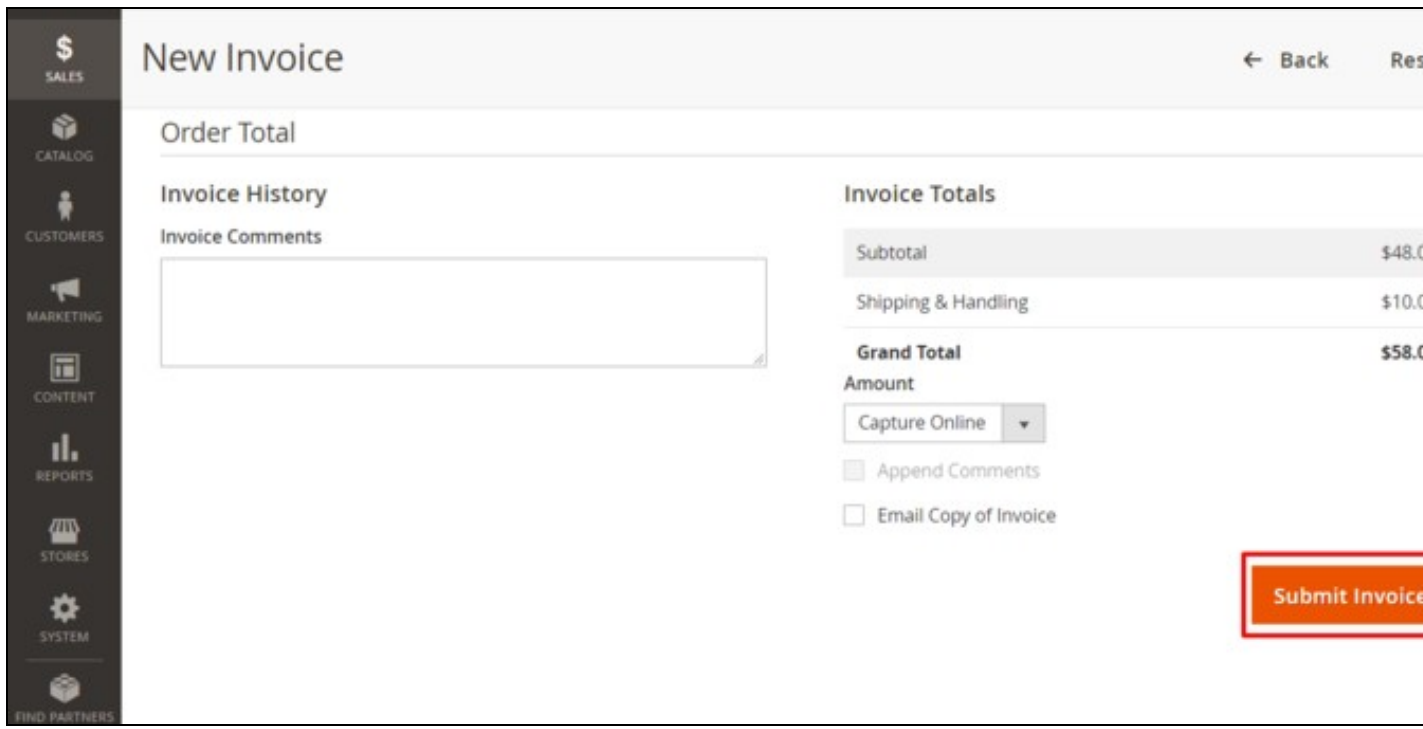
▼

Append Comments

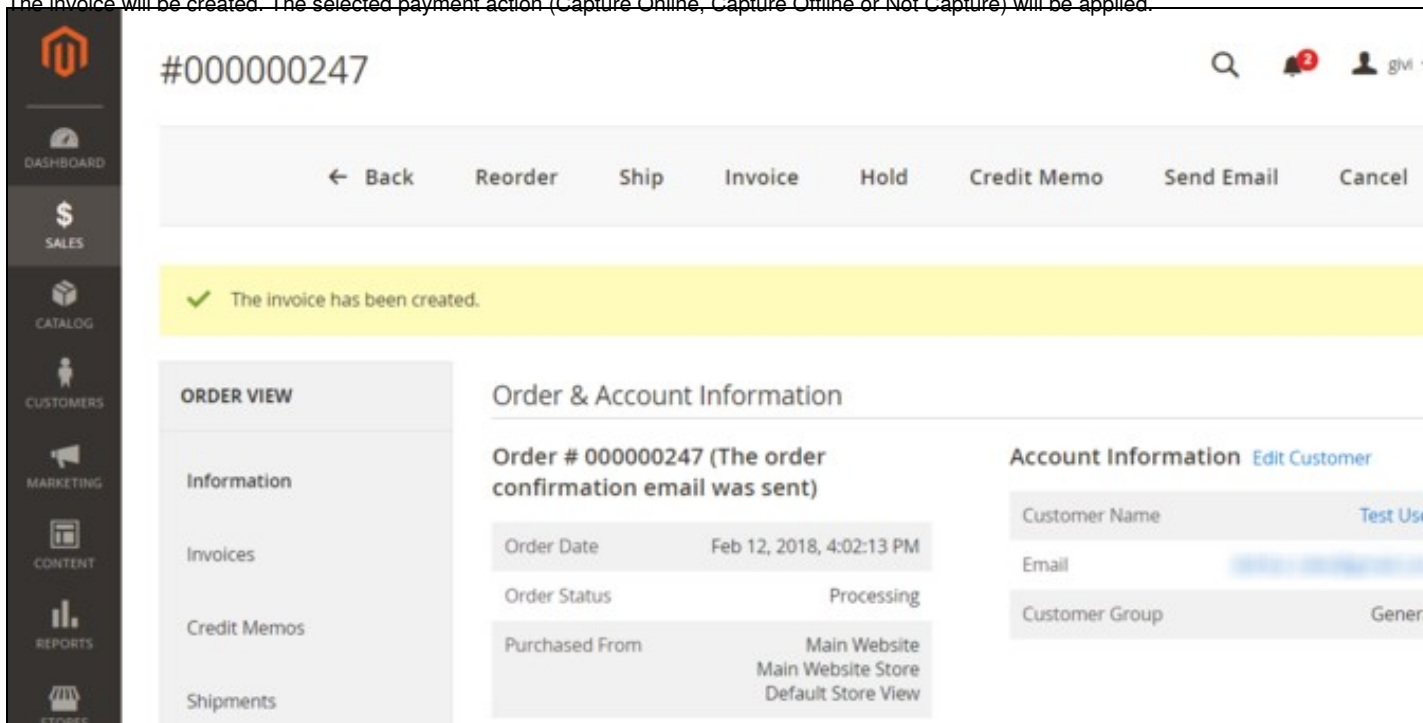
Email Copy of Invoice

- ◆ **Capture Online:** Upon invoice submission, the invoice amount will be captured (a request to capture the specified amount will be sent through X-Payments to the payment gateway). After the capture, you will have the ability to create a credit memo should you require to issue a refund.
 - ◆ **Capture Offline:** Upon invoice submission, the system will not capture the payment (no request to capture the payment will be sent). This option should be selected if the capture of funds is performed directly through the gateway or through the X-Payments back end. Note that after using the "Capture Offline" option you will no longer have the option to capture this payment through your Magento store. You will have the ability to create a credit memo.
 - ◆ **Not Capture:** Upon invoice submission, the system will not capture the payment (no request to capture the payment will be sent). This option assumes that you will capture the payment at a later date. The completed invoice (you will be able to access it through **Order View > Invoices**) will have a **Capture** button allowing you to complete the task. Before the payment is captured, you will be able to cancel the invoice. After capturing you will be able to create a credit memo.
- Important:** Do not select ?Not Capture? unless you are certain that you are going to capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured using the **Capture** button.

7. Click the **Submit Invoice** button to process the invoice.



The invoice will be created. The selected payment action (Capture Online, Capture Offline or Not Capture) will be applied.



Now if you go back to the order details and click on the **Invoices** tab under the **Order View** menu, you should be able to see the new invoice added to the list of invoices pertaining to the order:

System Messages: 2

One or more integrations have been reset because of a change to their xml configs.

#000000247

← Back Cancel Send Email Credit Memo Hold Invoice Ship Reorder

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Search by keyword

Filters

Default View Columns Export

Actions 1 records found 20 per page 1 of 1

<input type="checkbox"/>	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Actions
<input type="checkbox"/>	000000005	Feb 12, 2018 4:28:07 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Paid	\$58.00	View

An invoice created with the "Capture Online" option or captured after it has been created with the "Not Capture" option will have the status *Paid*. The respective capture transaction will appear in the X-Payments back end with the status *Charged*.
 An invoice created with the "Capture Offline" or "Not Capture" option will have the status *Pending*; no transaction will be reflected in X-Payments.