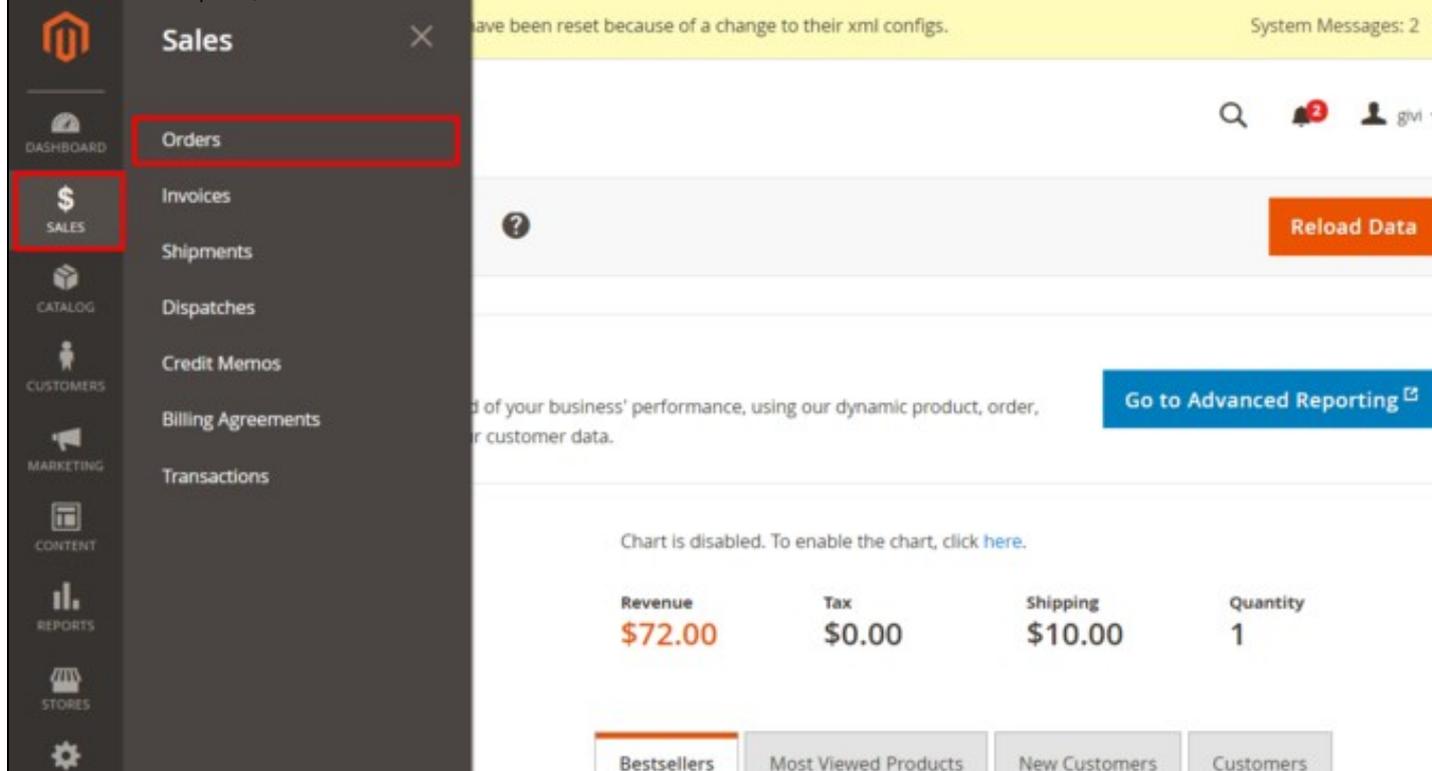


X-Payments: Issuing refunds when using X-Payments with Magento 2

After an order has been paid and invoiced, the entire order, or a portion of it, can be refunded. The basic method to do a refund in Magento is by issuing a credit memo.

To issue a refund:

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

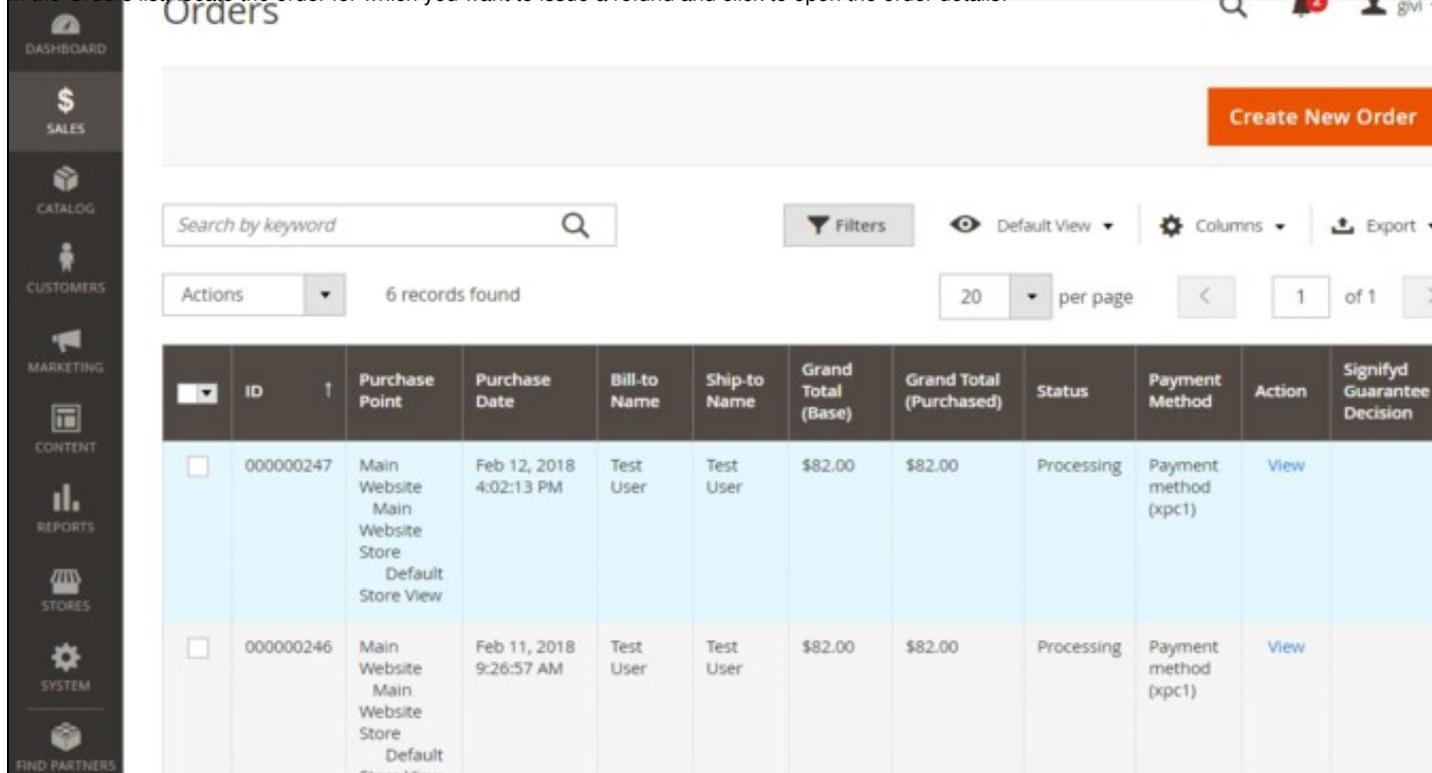


The screenshot shows the Magento 2 Administrator interface. On the left, a dark sidebar contains a menu with 'Sales' highlighted in red. Under 'Sales', 'Orders' is also highlighted in red. The main content area shows a dashboard with a yellow system message at the top, a search bar, and a 'Reload Data' button. Below this, there's a section for 'Go to Advanced Reporting' and a summary table with the following data:

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

At the bottom, there are tabs for 'Bestsellers', 'Most Viewed Products', 'New Customers', and 'Customers'.

2. In the Orders list, locate the order for which you want to issue a refund and click to open the order details:



The screenshot shows the 'Orders' list in the Magento 2 Administrator. The sidebar on the left has 'Sales' and 'Orders' highlighted. The main content area shows a search bar, filters, and a table with 6 records found. The table has the following columns: ID, Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, Payment Method, Action, and Signifyd Guarantee Decision. The first two rows are visible:

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. In the **Order View** menu on the left-hand side of the screen, select the **Invoices** tab. This opens a list of invoices pertaining to the order:

#000000247

← Back Send Email Credit Memo Hold Ship Reorder

Search by keyword Filters

Default View Columns Export

Actions 2 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<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
<input type="checkbox"/>	000000006	Feb 12, 2018 4:35:12 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Pending	\$24.00	View

4. Locate the invoice for the item(s) you need to refund and click to open it.

#000000247

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Search by keyword Filters

Default View Columns Export

Actions 2 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<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
<input type="checkbox"/>	000000006	Feb 12, 2018 4:35:12 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Pending	\$24.00	View

5. In the upper right of the Invoice page, click the **Credit Memo** button to start the refund process by generating a credit memo.

System Messages: 2

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

#000000005

← Back Send Email **Credit Memo** Print

Order & Account Information

Order # 00000247 (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	test@adaptable.com
Customer Group	General

The New Memo page opens:

System Messages: 2

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

New Memo for #000000005

← Back Reset

Order & Account Information

Order # 00000247 (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	test@adaptable.com
Customer Group	General

6. Scroll down to the "Items to Refund" section.

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

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STORES

SYSTEM

END PARTNERS

New Memo for #000000005

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Items to Refund

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Gwyn Endurance Tee SKU: WS01-M-Yellow Size: M Color: Yellow	\$24.00	Ordered 2 Invoiced 2	<input type="checkbox"/>	<input type="text" value="2"/>	\$48.00	\$0.00	\$0.00	\$48.00

Update Qty's

Order Total

Credit Memo Comments

Refund Totals

This section provides a list of items pertaining to the invoice and their respective quantities. By default, a refund will be issued for the entire invoice amount. If you are going to refund only some of the items and do a partial refund this time, update the quantities to refund (specify the correct quantities in the **Qty to Refund** column and click the **Update Qty's** button); the total amount to be credited will be re-calculated. Select the **Return to Stock** checkbox for the items that will be returned to inventory (Do not select the checkbox if the items will not be returned). If you want to refund shipping, issue an adjustment refund or add an adjustment fee, specify the respective amounts. **Important:** Before doing a partial refund, make sure your payment gateway supports this feature.

- Work through the process of creating a credit memo as usual: enter credit memo comments as needed, specify whether a notification of the credit memo needs to be emailed to the customer and whether your comments need to be appended to the notification.
- Click **Refund** or **Refund Offline** to process the refund (Select the button based on the action you require).

DASHBOARD

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New Memo for #000000005

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Order Total

Credit Memo Comments

Comment Text

Refund Totals

Subtotal	\$48.00
Refund Shipping	<input type="text" value="10"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	\$58.00

Append Comments

Email Copy of Credit Memo

Refund Offline **Refund**

If you select **Refund**, a refund request will be submitted to the payment gateway via X-Payments, and a refund will be given at the same time that the credit memo is issued. If you select **Refund Offline**, no refund request will be sent (This option assumes that you will handle the refund directly through the gateway or through the X-Payments back end).

Once you have completed the above steps, the credit memo should be created.

Now if you go back to the order details and select the **Credit Memos** tab under the **Order View** menu, you should be able to see the new credit memo added to the list of credit memos pertaining to the order:

<input type="checkbox"/>	Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refund
<input type="checkbox"/>	000000002	Feb 12, 2018 5:20:47 PM	000000247	Feb 12, 2018 4:02:13 PM	Test User	Refunded	\$58.00

The status will be shown as *Refunded*.
 If you have chosen to complete the refund online, the refund transaction will appear in X-Payments with the same status, *Refunded*.
 If you have chosen the "Refund Offline" option, the transaction will not be reflected in X-Payments.