

# Magento 1

## Openpay Order Status, Dispatch & Refunds

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### Order Status

Please share the information below with your team who looks after **orders, dispatch and refunds**.

- **Processing**  
After successful payment order status will be "Processing".
- **Complete**  
If the order is shipped or dispatch by the admin then orders status change to complete. If there is any partial refund it also changes the order to completed.
- **Cancelled**  
If the order is cancelled by an admin user, or if "Automatically Cancel Openpay Pending Orders" is set "yes" in Openpay payment settings, it will cancel the order based on the frequency of which it is configured. Openpay recommends that this frequency is set to "After one hour".
- **Close**  
If the order is fully refunded by an admin user, then orders status change to Close.

### Dispatch

Dispatch, Shipping and Refund can be easily done from Magento Admin panel.

### Refund

[Partial Refund](#)

[Full Refund](#)

## Partial Refund

Select an Openpay order you wish to partially refund. **Order Status** of that order should be either '**Complete**' or '**Processing**'. (Example: Order ID#145000021)

Navigate from Magento Admin Panel to **Sales > Orders >** Choose the Openpay order you wish to refund and click on **View**.

### Information > Invoice > Submit Invoice

Now, we have to create a **Credit Memo** for this order.

Click on **Invoices > Open the Invoice >** Click **Credit Memo** from the right upper corner.

New Credit Memo for the Order will be created.

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The 'Sales' tab is active. The left sidebar shows 'Order View' with sub-items: 'Information', 'Invoices' (highlighted), 'Credit Memos', 'Shipments', 'Comments History', and 'Transactions'. The main content area displays a green message: 'The invoice has been created.' Below this, the order details for 'Order # 145000021 | Oct 14, 2019 7:16:40 AM' are shown. A table of invoices is displayed with one row highlighted in red:

Invoice #	Bill to Name	Invoice Date	Status	Amount
103000012	peter jones	Oct 14, 2019 7:35:26 AM	Paid	\$80.00

The 'Credit Memo' button is highlighted in the top right corner of the order view area.

To double check if this plan is active log on to your **Openpay Retailer Portal** in this instance the Openpay Plan ID is '**3000000042178**'.  
(This is just an example your Openpay plan id will be different).

Plan Status column on Openpay dashboard will show the plan **Active** as we haven't refunded the plan yet.

**openpay AUS - TRAIN** Calculator

Operations Administration Trends Quick Dashboard

Plans in the last: 24 hours on: Tue, 15 Oct 2019 Update

When	Retailer	Location	Origin	Type	Plan	Status	Purchase
19:48	Shopify Testing	Web Sales 1	WEBSALES	Openpay+	3000000042178	Active	\$80.00

Plan totals for: 15 Oct 2019

Retailer Type	How Many	Average	Worth	% By \$	% By Qty
Miscellaneous	1	\$80.00	\$80.00	100%	100%

Retailer	How Many	Average	Worth	% By \$	% By Qty
Shopify Testing	1	\$80.00	\$80.00	100%	100%

Location	How Many	Average	Worth	% By \$	% By Qty
Web Sales 1	1	\$80.00	\$80.00	100%	100%

Plan	Plan Type	Received On	Plan Status	Refunded On	Customer	Retailer Inv No	Plan Duration	Worth
3000000042178	Openpay+	Mon, 14 Oct 2019 19:48	Active		PETER JONES	145000021	16 weeks	\$80.00

25 items per page No items to display

In the example below under **Adjustment Fee** we added \$30 which means we have refunded \$50 from the **Order Grand Total** of \$80 > Click **Refund**.

Partial Refund = Order Grand Total - Adjustment Fee  
\$80 - \$30 = \$50

**New Credit Memo for Invoice #103000012** Back Reset

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Chelsea Tee SKU: mtk005 Color: Black Size: L	\$75.00	Ordered 1 Invoiced 1	<input type="checkbox"/>	1	\$75.00	\$0.00	\$0.00	\$75.00

Paid Amount \$80.00	Refund Amount \$0.00	Shipping Amount \$5.00	Shipping Refund \$0.00	<b>Order Grand Total \$80.00</b>
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**Credit Memo Comments**

Credit Memo Comments

**Refund Totals**

Subtotal \$75.00

Refund Shipping 5

Adjustment Refund 0

Adjustment Fee 30

**Grand Total \$80.00**

Append Comments ☐

Email Copy of Credit Memo ☐

Back on **Openpay Retailer's Portal**, after the partial refund, we can see the Openpay plan is updated, and under the 'Purchase' column amount has changed from \$80 to \$30. The plan will still show Active as the balance amount is yet to be paid off.

Plans in the last: 24 hours on: Tue, 15 Oct 2019 [Update](#)

When	Retailer	Location	Origin	Type	Plan	Status	Purchase
19:48	Shopify Testing	Web Sales 1	WEBSALES	Openpay+	3000000042178	Active	\$30.00

Plan totals for: **15 Oct 2019**

Retailer Type	How Many	Average	Worth	% By \$	% By Qty
Miscellaneous	1	\$30.00	\$30.00	100%	100%
Shopify Testing	1	\$30.00	\$30.00	100%	100%
Web Sales 1	1	\$30.00	\$30.00	100%	100%

Plan	Plan Type	Received On	Plan Status	Refunded On	Customer	Retailer Inv No	Plan Duration	Worth
3000000042178	Openpay+	Mon, 14 Oct 2019 19:48	Active	Mon, 14 Oct 2019 20:16	PETER JONES	145000021	16 weeks	\$30.00

Navigation: 25 items per page, No items to display

On Magento admin, the order status will show "**Complete**" for **Partial Refund**.

**Orders** [Create New Order](#)

Page 1 of 4 pages | View 20 per page | Total 62 records found | [New Order RSS](#) | Export to: CSV | [Export](#) | [Reset Filter](#) | [Search](#)

Select Visible | Unselect Visible | 0 items selected

Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
145000021	Main Website Madison Island English	Oct 14, 2019 7:16:40 AM	peter jones	peter jones	\$80.00	\$80.00	Complete	<a href="#">View</a>
145000020	Main Website Madison Island English	Oct 14, 2019 5:27:17 AM	peter jones	peter jones	\$65.00	\$65.00	Complete	<a href="#">View</a>
145000019	Main Website Madison Island English	Oct 14, 2019 4:42:30 AM	paul johnson	paul johnson	\$165.00	\$165.00	Closed	<a href="#">View</a>
145000018	Main Website Madison Island English	Oct 14, 2019 4:39:05 AM	paul jameson	paul jameson	\$165.00	\$165.00	Pending Openpay Approval	<a href="#">View</a>
145000017	Main Website Madison Island English	Oct 14, 2019 4:31:29 AM	tom jones	tom jones	\$165.00	\$165.00	Pending Openpay Approval	<a href="#">View</a>
145000016	Main Website Madison Island English	Oct 11, 2019 7:20:16 AM	peter jones	peter jones	\$80.00	\$80.00	Processing	<a href="#">View</a>

## Full Refund

Select an Openpay order you wish to refund fully. **Order Status** of that order should be either **'Complete'** or **'Processing'**. (Example: Order ID# 145000022)

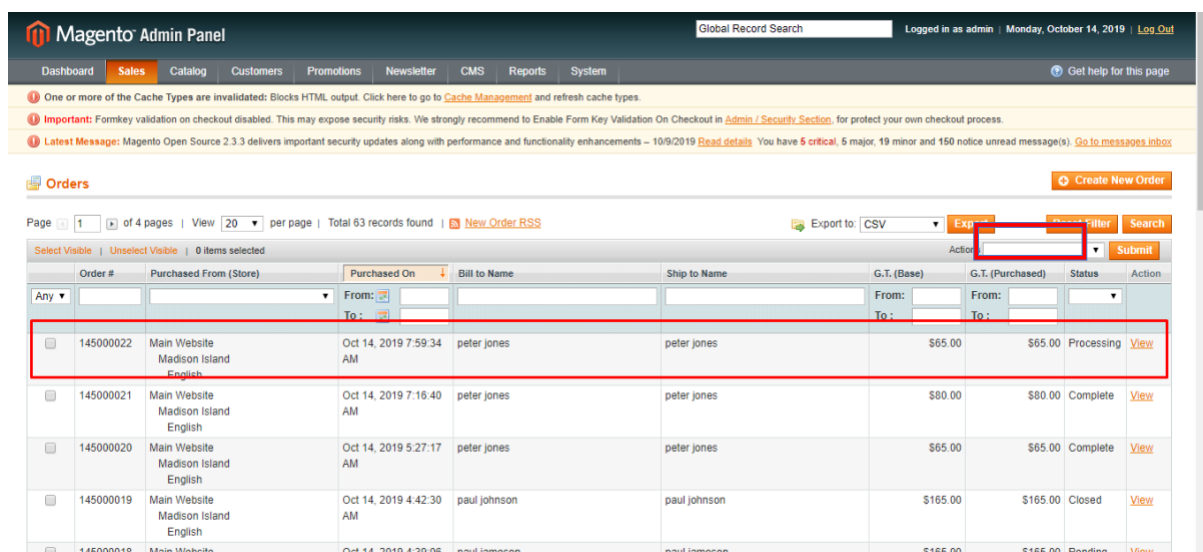
Navigate from Magento Admin Panel to **Sales > Orders >** Choose the Openpay order you wish to refund and click on **View**.

### Information > Invoice > Submit Invoice

Now, we have to create a **Credit Memo** for this order.

Click on **Invoices > Open the Invoice >** Click **Credit Memo** from the right upper corner.

New Credit Memo for the Order will be created.



The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'Sales' selected. Below it, a table lists orders. The first order, ID 145000022, is highlighted with a red box. The order details are as follows:

Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
145000022	Main Website Madison Island English	Oct 14, 2019 7:59:34 AM	peter jones	peter jones	\$65.00	\$65.00	Processing	<a href="#">View</a>
145000021	Main Website Madison Island English	Oct 14, 2019 7:16:40 AM	peter jones	peter jones	\$80.00	\$80.00	Complete	<a href="#">View</a>
145000020	Main Website Madison Island English	Oct 14, 2019 5:27:17 AM	peter jones	peter jones	\$65.00	\$65.00	Complete	<a href="#">View</a>
145000019	Main Website Madison Island English	Oct 14, 2019 4:42:30 AM	paul johnson	paul johnson	\$165.00	\$165.00	Closed	<a href="#">View</a>
145000018	Main Website	Oct 14, 2019 4:39:06	paul jameson	paul jameson	\$165.00	\$165.00	Pending	<a href="#">View</a>

To double check if this plan is active log on to your **Openpay Retailer Portal** in this instance the Openpay Plan ID is **'3000000042179'**.  
(This is just an example your Openpay plan id will be different).

Plan Status column on Openpay dashboard will show the plan **Active** as we haven't refunded the plan yet.

20:30	Shopify Testing	Web Sales 1	WEBSALES	Openpay+	3000000042179	Active	\$65.00
19:48	Shopify Testing	Web Sales 1	WEBSALES	Openpay+	3000000042178	Active	\$30.00

Plan totals for: **15 Oct 2019**

Retailer Type ^	How Many	Average	Worth	% By \$	% By Qty
Miscellaneous	2	\$47.50	\$95.00	100%	100%

Retailer ^	How Many	Average	Worth	% By \$	% By Qty
Shopify Testing	2	\$47.50	\$95.00	100%	100%

Location ^	How Many	Average	Worth	% By \$	% By Qty
Web Sales 1	2	\$47.50	\$95.00	100%	100%

Plan	Plan Type	Received On ^	Plan Status	Refunded On	Customer	Retailer Inv No	Plan Duration	Worth
3000000042178	Openpay+	Mon, 14 Oct 2019 19:48	Active	Mon, 14 Oct 2019 20:16	PETER JONES	145000021	16 weeks	\$30.00
3000000042179	Openpay+	Mon, 14 Oct 2019 20:30	Active		PETER JONES	145000022	16 weeks	\$65.00

Navigation: 0 items per page, No items to display

Summary: 2 items, \$95.00, 1 - 1 of 1 items

Back to your Magento admin scroll down to Refund Totals, **Adjustment Fee** should be "0" > click on Refund button this will refund the full order amount.

← → ↻ ⌂ ⓘ Not secure | 192.168.1.76/m1newv3/index.php/admin/sales\_order\_creditmemo/new/order\_id/211/invoice\_id/54/key/b58265d7c3f9088de3d8638662b47df8/ ☆ ⚙

**New Credit Memo for Invoice #103000013** [Back] [Reset]

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Tori Tank SKU: wbk003d Color: Indigo Size: XL	\$60.00	Ordered 1 Invoiced 1	<input type="checkbox"/>	1	\$60.00	\$0.00	\$0.00	\$60.00

Paid Amount \$65.00	Refund Amount \$0.00	Shipping Amount \$5.00	Shipping Refund \$0.00	<b>Order Grand Total \$65.00</b>
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**Credit Memo Comments**

Credit Memo Comments

**Refund Totals**

Subtotal \$60.00

Refund Shipping 5

Adjustment Refund 0

**Adjustment Fee 0**

Grand Total \$65.00

Append Comments ☐

Email Copy of Credit Memo ☐

☒ Refund Offline ☒ **Refund**

On Magento admin order status is "**Closed**".

**Magento Admin Panel** Global Record Search Logged in as admin | Monday, October 14, 2019 | [Log Out](#)

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One or more of the Cache Types are invalidated: Blocks HTML output. Click here to go to [Cache Management](#) and refresh cache types.

**Important:** Formkey validation on checkout disabled. This may expose security risks. We strongly recommend to Enable Form Key Validation On Checkout in [Admin / Security Section](#), for protect your own checkout process.

**Latest Message:** Magento Open Source 2.3.3 delivers important security updates along with performance and functionality enhancements – 10/9/2019 [Read details](#) You have 5 critical, 5 major, 19 minor and 150 notice unread message(s). [Go to messages inbox](#)

**Orders** [Create New Order](#)

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Select Visible | Unselect Visible | 0 items selected Actions [Submit](#)

Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
145000022	Main Website Madison Island English	Oct 14, 2019 7:59:34 AM	peter jones	peter jones	\$65.00	\$65.00	Closed	<a href="#">View</a>
145000021	Main Website Madison Island English	Oct 14, 2019 7:16:40 AM	peter jones	peter jones	\$80.00	\$80.00	Complete	<a href="#">View</a>
145000020	Main Website Madison Island English	Oct 14, 2019 5:27:17 AM	peter jones	peter jones	\$65.00	\$65.00	Complete	<a href="#">View</a>
145000019	Main Website Madison Island English	Oct 14, 2019 4:42:30 AM	paul johnson	paul johnson	\$165.00	\$165.00	Closed	<a href="#">View</a>
145000018	Main Website Madison Island	Oct 14, 2019 4:39:06 AM	paul jameson	paul jameson	\$165.00	\$165.00	Pending	<a href="#">View</a>

You have now fully refunded the Magento Order.

You may confirm the refund on **Openpay Retailer's Dashboard**. The Openpay Plan Status will be changed to **Refunded** and the **Purchase** amount will change to **\$0.00**

Operations Administration Trends Quick Dashboard

Plans in the last: 24 hours on: Tue, 15 Oct 2019 [Update](#)

When	Retailer	Location	Origin	Type	Plan	Status	Purchase
02:00	Shopify Testing	Web Sales I	WEBSALES	Openpay+	3000000042178	Refunded	\$0.00
03:00	Shopify Testing	Web Sales I	WEBSALES	Openpay+	3000000042178	Active	\$30.00

Plan totals for: 15 Oct 2019

Retailer Type	How Many	Average	Worth	% By \$	% By Qty
Miscellaneous	2	\$15.00	\$30.00	100%	100%

Retailer	How Many	Average	Worth	% By \$	% By Qty
Shopify Testing	2	\$15.00	\$30.00	100%	100%

Location	How Many	Average	Worth	% By \$	% By Qty
Web Sales I	2	\$15.00	\$30.00	100%	100%

Plan	Plan Type	Received On	Plan Status	Refunded On	Customer	Retailer Inv No	Plan Duration	Worth
3000000042178	Openpay+	Tue, 15 Oct 2019 03:00	Active	Tue, 15 Oct 2019 03:46	PETER JONES	145000021	16 weeks	\$30.00
3000000042179	Openpay+	Tue, 15 Oct 2019 02:00	Refunded	Tue, 15 Oct 2019 02:02	PETER JONES	145000022	16 weeks	\$0.00

25 items per page No items to display

2 \$30.00 1 - 1 of 1 items

2 \$30.00 1 - 1 of 1 items