

# Elavon Converge Payment for Magento 2

## User Guide

Version 1.0

# Table of Contents

|   |           |
|---|-----------|
| <b>I) Introduction.....</b>                               | <b>2</b>  |
| <b>II) Where to Find Extension.....</b>                   | <b>3</b>  |
| 1. Converge Gateway by Magezon.....                       | 4         |
| 2. Basic Converge Payment Settings .....                  | 7         |
| 3. Advanced Converge Payment Settings .....               | 9         |
| <b>III) Payment via Converge Gateway.....</b>             | <b>12</b> |
| 1. From Checkout Page .....                               | 12        |
| 2. When Creating New Orders in Backend.....               | 14        |
| 3. View Payment Information .....                         | 15        |
| <b>IV) Save Cards for Later Use .....</b>                 | <b>17</b> |
| 1. Save Cards.....  | 17        |
| 2. View Saved Cards From Customer Account Dashboard ..... | 18        |
| 3. View Saved Cards From Customer Information Page .....  | 20        |
| 4. Pay With Stored Cards .....                            | 21        |
| <b>V) Payment With Subscription Products .....</b>        | <b>23</b> |
| 1. Configure Subscriptions for a Product .....            | 23        |
| 2. Pay for Subscription Products .....                    | 27        |
| 3. View Subscriptions .....                               | 29        |
| <b>VI) Payment With Installment Products .....</b>        | <b>32</b> |
| 1. Configure Installments for a Product.....              | 32        |
| 2. Pay for Installment Products .....                     | 34        |
| 3. View Installments.....                                 | 36        |
| <b>VII) Support .....</b>                                 | <b>39</b> |

## I) Introduction

**Magento 2 Elavon Converge Payment** lets you collect payments securely and quickly via the Elavon Converge gateway integrated into your Magento 2 store. It will keep sensitive customer data completely safe as the data never touches your server.

- Support various payment types
- Complete payment details right on checkout page
- Support 2 payment actions
- Save cards for future use
- Allow subscription & installment payments

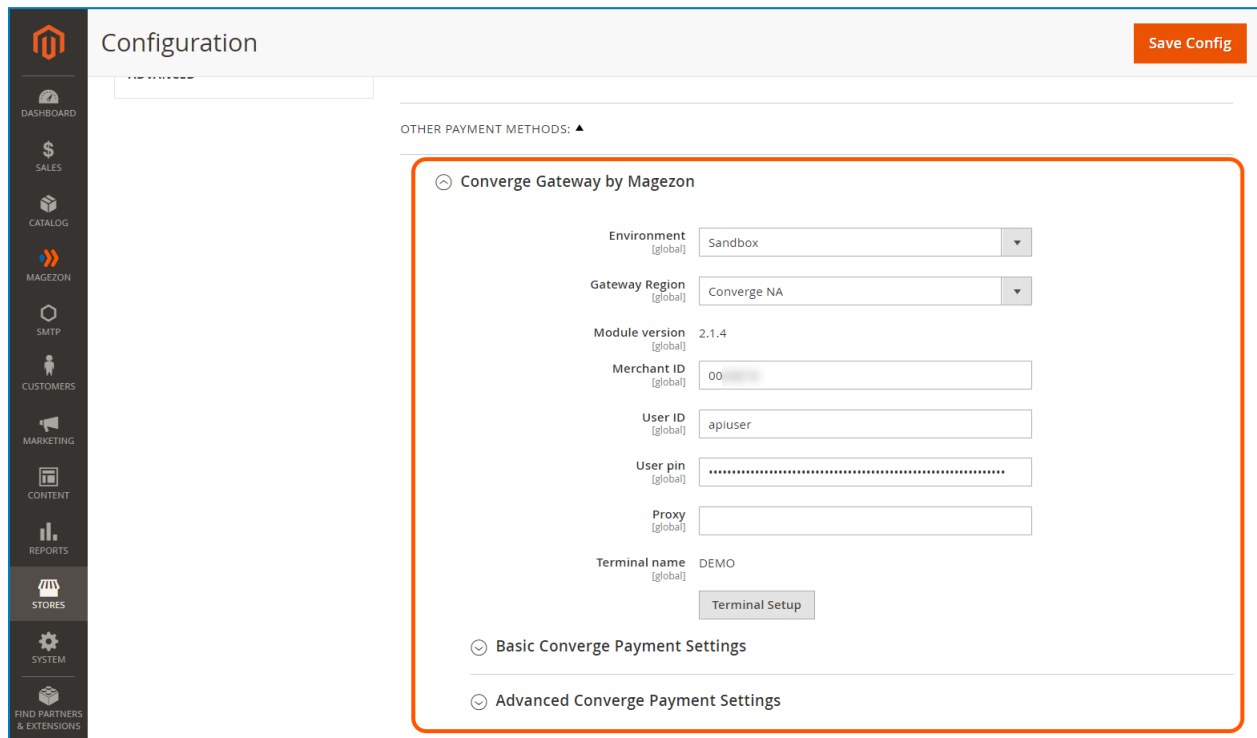
## II) Where to Find Extension

After installing the extension, go to **Stores > Configuration > Sales > Payment**

### Methods.

On the right-hand panel, under the OTHER PAYMENT METHODS section, you can find the **Converge Gateway by Magezon** configuration panel. The configuration panel contains three sections:

- Converge Gateway by Magezon
- Basic Converge Payment Settings
- Advanced Converge Payment Settings



## 1. Converge Gateway by Magezon

This section is displayed under the title of the payment method. It contains the following fields:

⊖ Converge Gateway by Magezon

Environment [global]

Gateway Region [global]

Module version [global] 2.1.4

Merchant ID [global]

User ID [global]

User pin [global]

Proxy [global]

Terminal name [global] DEMO

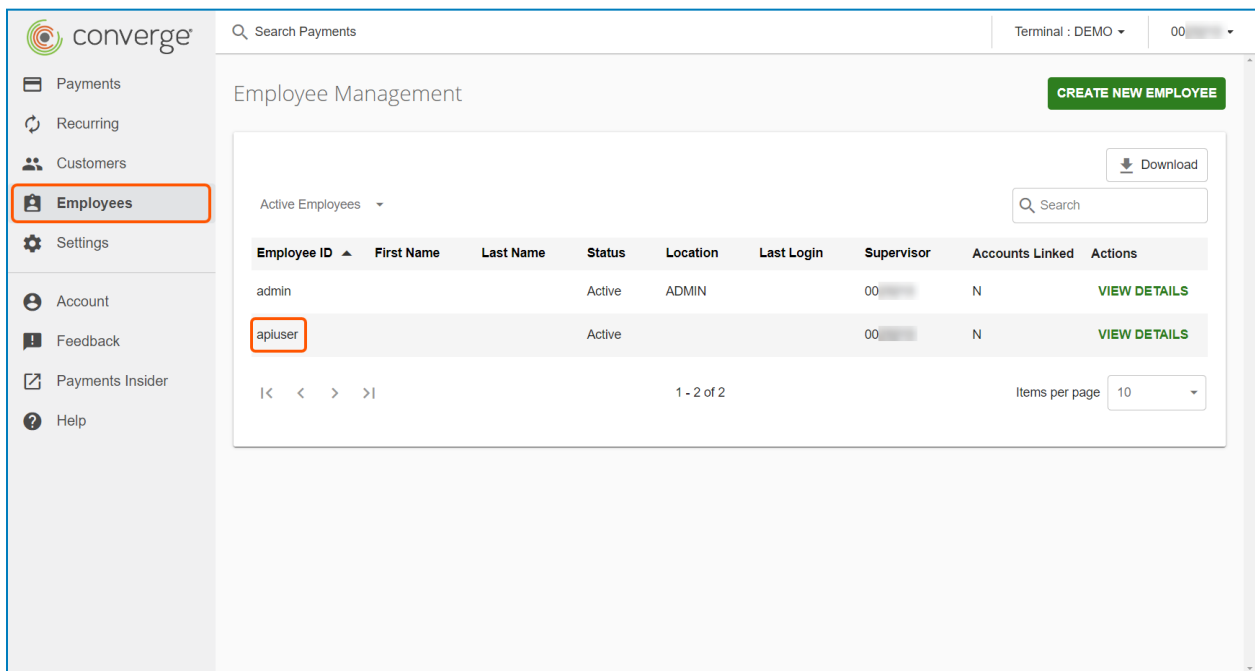
- **Environment:** allow you to switch between Sandbox and Production environment. Select **Sandbox** to send transactions to a Converge demo account for testing the payment method. Choose **Production** to send transactions to a Converge live account.

\* **Note:** Use [test cards](#) when testing the integration.

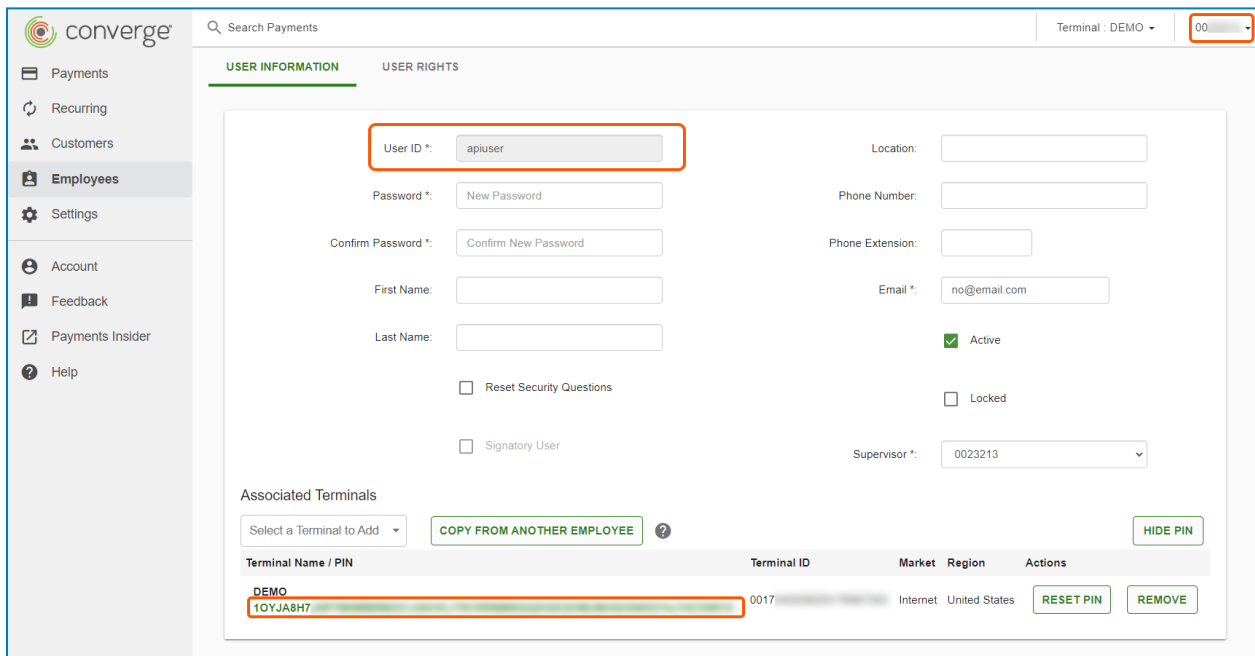
- **Gateway Region:** this option has currently only one value, Converge NA. Converge EU will be added once the functionalities are available.
- **Module version:** show the currently installed version of Converge plugin.
- Enter the **Merchant ID**, **User ID** and **User pin** to connect your site to your Elavon Converge account.

\* **Note:** Follow the steps below to find the above credentials:

- [Login to your Converge account.](#)
- Go to **Employees** and select an employee.



- On this page, you can find the **Merchant ID** (or Account ID) in the top-right corner, the **User ID** in the User Information section, and the **User pin** by clicking **Show PIN**.



converge Search Payments Terminal: DEMO 00

**USER INFORMATION** USER RIGHTS

User ID \*: apiuser

Location:

Password \*:

Phone Number:

Confirm Password \*:

Phone Extension:

First Name:

Email \*:

Last Name:

Active

Reset Security Questions

Locked

Signatory User

Supervisor \*:

Associated Terminals

Select a Terminal to Add

| Terminal Name / PIN | Terminal ID | Market   | Region        | Actions  |
|---------------------|-------------|----------|---------------|--|
| DEMO<br>10YJA8H7    | 0017        | Internet | United States | <input type="button" value="RESET PIN"/> <input type="button" value="REMOVE"/> |

- **Proxy:** this field should be filled with a string that is related to authentication and will be provided by contacting Elavon.
- **Terminal name:** this field represents the name of the Converge terminal you are connecting to. The value for this field is displayed after you click “Terminal Setup”.

## 2. Basic Converge Payment Settings

⌵ Basic Converge Payment Settings

|  |   |
|--|---|
| Title<br><small>[global]</small>   | <input type="text" value="Payment method (ConvergeGateway)"/>                           |
| Enabled<br><small>[global]</small>   | <input type="text" value="Yes"/> ▼  |
| Recurring/Installment Enabled<br><small>[global]</small>                           | <input type="text" value="Yes"/> ▼  |
| Payment Action<br><small>[global]</small>  | <input type="text" value="Authorize and Capture"/> ▼                                    |
| Integration Method<br><small>[global]</small>                                      | <input type="text" value="Checkout.js (PCI SAQ A-EP)"/> ▼                               |
| License Code<br><small>[global]</small>  | <input type="text" value="12"/>   |
| Doing Business As Name<br><small>[global]</small>                                  | <input type="text"/>  |
| Save for later use message<br><small>[global]</small>                              | <input type="text" value="All Card information is stored on Elavon Converge servers."/> |
| Disclosure message for subscription/installment options<br><small>[global]</small> | <input type="text" value="By placing your order, you agree to the recurring charges"/>  |

- **Title:** enter a specific title of the payment method that is displayed on the frontend.
- **Enabled:** enable/disable this payment method on the checkout page.
- **Recurring/Installment Enabled:** the value for this field is determined based on the options supported by the terminal and cannot be edited. Also, the value for this field determines if the sections for [subscriptions](#) and [installments](#) from the product configuration are displayed or not.
- **Payment Action:** control how transactions are submitted to Converge.



- ❖ **Authorize:** the order amount will only be authorized on the credit card used for the transaction. And you will have to create an invoice from your Magento backend so that the credit card is charged.
- ❖ **Authorize and Capture:** the transaction will be authorized and the credit card is charged immediately. An invoice will be created automatically and no additional action is needed from your side for this transaction to be settled.
- **Integration Method:** there is only one available integration method option that is **Checkout.js (PCI SAQ A-EP)**. The payment data is collected right from your Magento 2 store's checkout page and sent to Converge for processing. Sensitive data won't touch your server allowing you to avoid the compliance burden for handling payment card information or personally identifying data.
- **License Code:** this value for this field is provided by Converge and should be sent with each transaction.
- **Doing Business As Name:** enter the DBA name that is provided by you with each transaction.
- **Save for later use message:** define a message that is displayed to the user when they are trying to [save a card for later use](#).
- **Disclosure message for subscription/installment options:** define a message that is displayed to the user when he/she is trying to [place an order with subscription/installment products](#). This message will be displayed to the customer next to the Place Order button.

## 3. Advanced Converge Payment Settings

⊖ Advanced Converge Payment Settings

**Merchant Name** [global]

**Region** [global]

**Payment Types Accepted** [global]

**Credit Cards Accepted** [global]

**Wallets Enabled** [global]

**Currency Conversion** [global]

**Language Translations** [global]

**Value Added Service** [global]

**Log Level** [global]

- **Merchant Name:** this option is not editable and is loaded from Converge.
- **Region:** this option is not configurable and is loaded from Converge and used to limit the selection for other options like the **Language Translations**.
- **Payment Types Accepted:** this field is not configurable, and it displays the available options for the selected terminal. Besides the response from Converge Terminal, the options are influenced by the **Payment Action** type. If the Authorize option is selected, all options except Credit Card are removed.

The possible values are: Credit Card, ACH, Gift Card. Please note that if the recurring functionality is enabled, gift cards will not be supported.

- **Credit Cards Accepted:** this field is not configurable, and it displays the available options for the selected terminal. The possible values are: VISA, Master Card, American Express, Discover, JCB (Japan Credit Bureau), CUP (China UnionPay).
- **Wallets enabled:** this field is not configurable, and it displays the available options for the selected terminal. The possible values are: Click to Pay, PayPal, Apple Pay. Please note that if the recurring functionality is enabled, wallets will be disabled. The wallets from this field will be hidden and replaced with the message “None - Recurring is enabled”.
- **Currency Conversion:** the values for this option are loaded from Converge and used only to show the possible features in the future. The possible values are:
  - ❖ Multi-Currency Conversion – coming soon
  - ❖ Dynamic Currency Conversion – coming soon

- **Language Translations:** this field is a dropdown where the language options are displayed for a selected region. All the content in our Elavon Converge Payment extension will be translated.
- **Value Added Service:** values for this option are loaded from Converge, displayed to the user based on terminal settings. The possible values are:
  - ❖ **Recurring billing:** if this option is available for the terminal, you will be able to [configure subscriptions for a product](#).
  - ❖ **Tokenization:** if the terminal allows tokenization, the customers will have the option to [save cards for later use](#).
  - ❖ **Level 3 data:** this option allows sending additional data with each transaction based on the data provided by you as the merchant.
  - ❖ **3D Secure:** if this option is enabled for the terminal, the transactions will be authenticated using 3D Secure in case the card is enrolled in 3DS.
- **Log level:** this field allows you to define the level for the transaction processing issue logging. The options are Debug, Error, and Critical. These values indicate the severity, Debug being the lowest level and Critical being the highest one.

## III) Payment via Converge Gateway

### 1. From Checkout Page

Customers have to access the checkout page to initiate a payment via Converge. After they populate *Shipping Address* (for products with weight) and click on the *Next* button, they will be presented with the *Review & Payments* page where they can select Converge Gateway as payment method.

Once a customer selects the Converge payment method, he/she will be presented with available payment types right on the checkout page. Based on each payment type, the customer should provide relevant details:

- Payment with a credit card includes **Credit Card Number**, **Expiration Date** and **Card Verification Number**.
- Payment with a gift card includes **Card number** and **Expiration Date**.
- Payment with Electronic Check (ACH) includes **Bank Routing/Transit Number**, **Bank Account Number**, **Check Number**, **Bank Account Type**, **First Name**, **Last Name** and to agree to the displayed message.

## Payment Method

 PayPal Express Checkout [What is PayPal?](#)

Payment method (ConvergeGateway)

Michael Cao  
556 Scranton Road  
San Diego, California 92121  
United States  
0123456789

Credit Card



Credit Card Number \*

\*\*\*\* \* 16 digit card number

Expiration Date \*

MM / YY

Card Verification Number \*

\*\*\*\* ?

Save for later use. ?


## Order Summary

Cart Subtotal \$2,750.00

Shipping \$11.76  
United Parcel Service - UPS  
Ground

**Order Total \$2,761.76**

1 Item in Cart ▼

Ship To: 

Michael Cao  
556 Scranton Road  
San Diego, California 92121  
United States  
0123456789

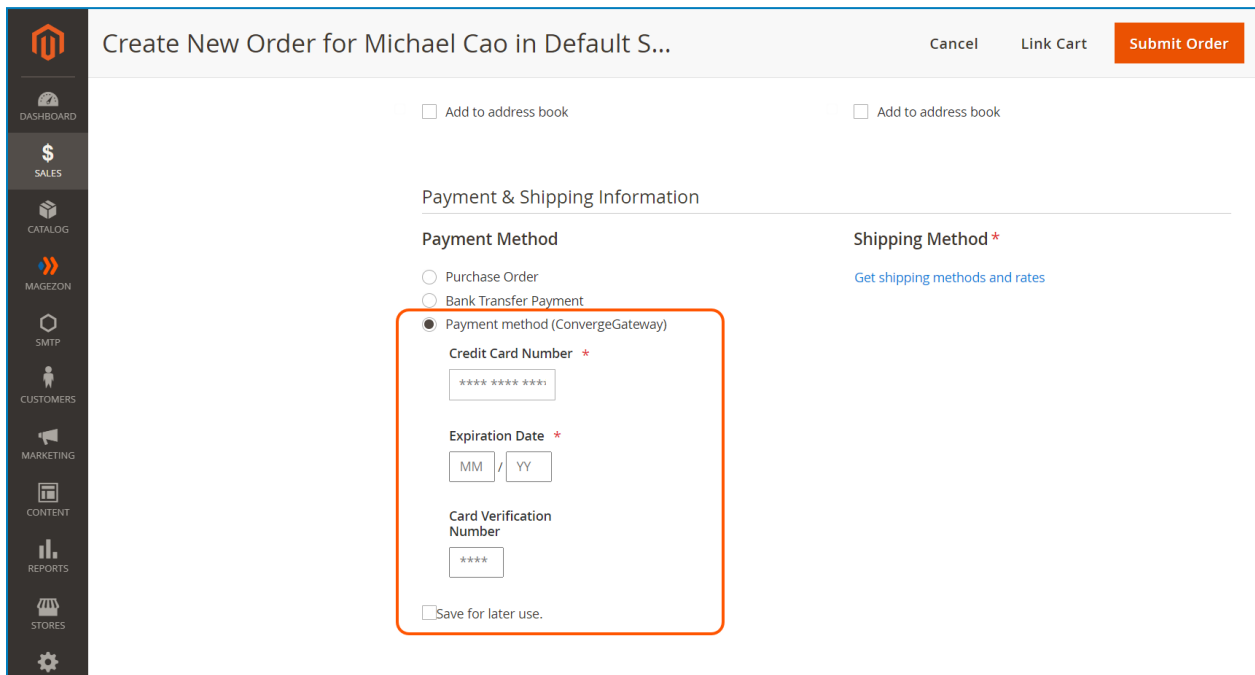
Shipping Method: 

United Parcel Service - UPS Ground

**Place Order**

## 2. When Creating New Orders in Backend

When you create a new order for a customer from your Magento backend, you can capture payments with **Payment method (ConvergeGateway)**. Choose a payment type and complete payment details.



Create New Order for Michael Cao in Default S... Cancel Link Cart Submit Order

Add to address book  Add to address book

Payment & Shipping Information

Payment Method

Purchase Order

Bank Transfer Payment

Payment method (ConvergeGateway)

Credit Card Number \*

\*\*\*\* \* \* \* \* \*

Expiration Date \*

MM / YY

Card Verification Number

\*\*\*\*

Save for later use.

Shipping Method \*

[Get shipping methods and rates](#)

### 3. View Payment Information

After customers successfully place an order, they can go to their account dashboard, open the **My Orders** section and view the order with payment information.

- My Account
- My Orders**
- My Downloadable Products
- My Wish List

---

- Address Book
- Account Information
- Stored Payment Methods
- My Product Subscriptions
- Newsletter Subscriptions
- My Subscriptions
- My Installments

## Order # 000000543 COMPLETE

July 16, 2023 [Print Order](#)

[Reorder](#)

Items Ordered
Invoices
Order Shipments

| Product Name  | SKU         | Price      | Qty                      | Subtotal          |
|---|-------------|------------|--------------------------|-------------------|
| MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | MAC16M22023 | \$2,750.00 | Ordered: 1<br>Shipped: 1 | \$2,750.00        |
| <b>First Pay</b>                                    |             |            |                          |                   |
| \$100.00  |             |            |                          |                   |
| <b>Installment Option</b>                           |             |            |                          |                   |
| 4 QUARTERLY installments                            |             |            |                          |                   |
| <b>Subtotal</b>                                     |             |            |                          | \$2,750.00        |
| Shipping & Handling                                 |             |            |                          | \$11.76           |
| <b>Grand Total</b>                                  |             |            |                          | <b>\$2,761.76</b> |

#### Order Information

|  |                                    |  |
|--|------------------------------------|--|
| <b>Shipping Address</b>  | <b>Shipping Method</b>             | <b>Billing Address</b>   |
| Michael Cao<br>556 Scranton Road<br>San Diego, California, 92121<br>United States<br>T: 0123456789 | United Parcel Service - UPS Ground | Michael Cao<br>556 Scranton Road<br>San Diego, California, 92121<br>United States<br>T: 0123456789 |

#### Payment Method

Payment method (ConvergeGateway)

|                                      |                   |
|--------------------------------------|-------------------|
| <b>Payment Type</b>                  | CARDVERIFICATION  |
| <b>Credit Card Number</b>            | 40*****6781       |
| <b>Transaction Type</b>              | CARDVERIFICATION  |
| <b>AVS Postal Code Response Code</b> | Unknown           |
| <b>Processor Authorization Code</b>  | N39002            |
| <b>Processor Response Code</b>       | 0                 |
| <b>Processor Response Text</b>       | APPROVAL          |
| <b>3DS Authentication Status</b>     | Not Authenticated |



On the order view page in the backend, you can view the payment information:

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions
- Installments

### Order & Account Information

**Order # 00000543 (The order confirmation email was sent)**

|                |  |
|----------------|--|
| Order Date     | Jul 16, 2023, 8:39:19 PM                                 |
| Order Status   | Complete   |
| Purchased From | Main Website<br>Main Website Store<br>Default Store View |
| Placed from IP | 14.248.94.137  |

**Account Information** [Edit Customer](#)

|                |                            |
|----------------|----------------------------|
| Customer Name  | Michael Cao                |
| Email          | <a href="#">[redacted]</a> |
| Customer Group | General                    |

---

### Address Information

**Billing Address** [Edit](#)

Michael Cao  
556 Scranton Road  
San Diego, California, 92121  
United States  
T: 0123456789

**Shipping Address** [Edit](#)

Michael Cao  
556 Scranton Road  
San Diego, California, 92121  
United States  
T: 0123456789

---

### Payment & Shipping Method

**Payment Information**

Payment method (ConvergeGateway)

|                                |                   |
|--------------------------------|-------------------|
| Payment Type:                  | CARDVERIFICATION  |
| Credit Card Number:            | 40*****6781       |
| Transaction Type:              | CARDVERIFICATION  |
| AVS Postal Code Response Code: | Unknown           |
| Processor Authorization Code:  | N39002            |
| Processor Response Code:       | 0                 |
| Processor Response Text:       | APPROVAL          |
| 3DS Authentication Status:     | Not Authenticated |

The order was placed using USD.

**Shipping & Handling Information**

**United Parcel Service - UPS Ground \$11.76**


## IV) Save Cards for Later Use

### 1. Save Cards

Logged in customers can store a credit card to use for future payments without filling out the card details again and again. On the *Review & Payments* page during the checkout, tick the **Save for later use** checkbox. If you click on the question mark icon, a message will be displayed (This message is defined in the **Save for later use message** field in the configuration).







556 SCRANTON ROAD  
San Diego, California 92121  
United States  
0123456789

0123456789

Shipping Method: 

United Parcel Service - UPS  
Ground

Credit Card


Credit Card Number \*


\*\*\*\* \* \* \* \* \*

Expiration Date \*

MM / YY

Card Verification Number \*

\*\*\*\* 

Save for later use.  All Card information is stored on Elavon Converge servers.

**Place Order**

## 2. View Saved Cards From Customer Account Dashboard

Customers can view all stored cards from their account dashboard in the **Stored Payment Methods** section:

- My Account
- My Orders
- My Downloadable Products
- My Wish List

---






- Address Book
- Account Information
- Stored Payment Methods**
- My Product Subscriptions

---

- Newsletter Subscriptions
- My Subscriptions
- My Installments

### Stored Payment Methods

[Add New Card](#)

| Card Number | Expiration Date | Type  |   |
|-------------|-----------------|---|---|
| ending 0002 | 0930            |    | <a href="#" style="color: red;">Delete</a><br><a href="#" style="color: blue;">Edit</a> |
| ending 0005 | 1226            |    | <a href="#" style="color: red;">Delete</a><br><a href="#" style="color: blue;">Edit</a> |
| ending 2124 | 1226            |    | <a href="#" style="color: red;">Delete</a><br><a href="#" style="color: blue;">Edit</a> |
| ending 6781 | 1228            |    | <a href="#" style="color: red;">Delete</a><br><a href="#" style="color: blue;">Edit</a> |
| ending 0002 | 1230            |  | <a href="#" style="color: red;">Delete</a><br><a href="#" style="color: blue;">Edit</a> |

- Click **Delete** to delete a stored card and click **Edit** to edit the Expiration Date and the Card Verification Number for a stored card.
- Click the **Add New Card** button to add a new card.

## My Account

### Add New Credit Card

#### Personal Information

**First Name \***

**Last Name \***

**Address \***

**Zip Code \***

#### Credit Card Information

**Credit Card Number \***

**Expiration Date \***  
MM / YY

**Card Verification Number \***  
 ?

[Save Credit Card](#)

- My Account
- My Orders
- My Downloadable Products
- My Wish List

---

- Address Book
- Account Information
- Stored Payment Methods
- My Product Subscriptions

---

- Newsletter Subscriptions
- My Subscriptions
- My Installments

Compare Products

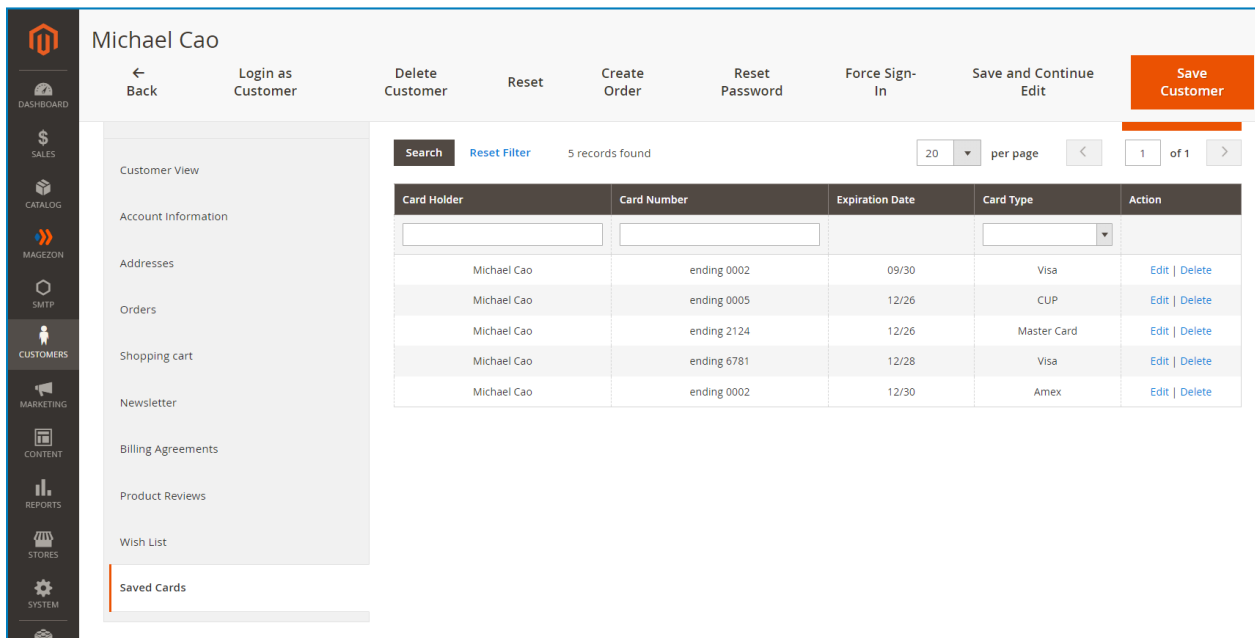
You have no items to compare.

Recently Ordered

## 3. View Saved Cards From Customer Information Page

Navigate to **Customers > All Customers** and open a Customer Information page in your Magento backend. There you can view stored cards of a customer.

In the left panel of the page, click the **Saved Cards** tab. All the saved cards are listed in a grid. You can delete or edit a saved card, or add a new card by clicking the **Add New Card** button.

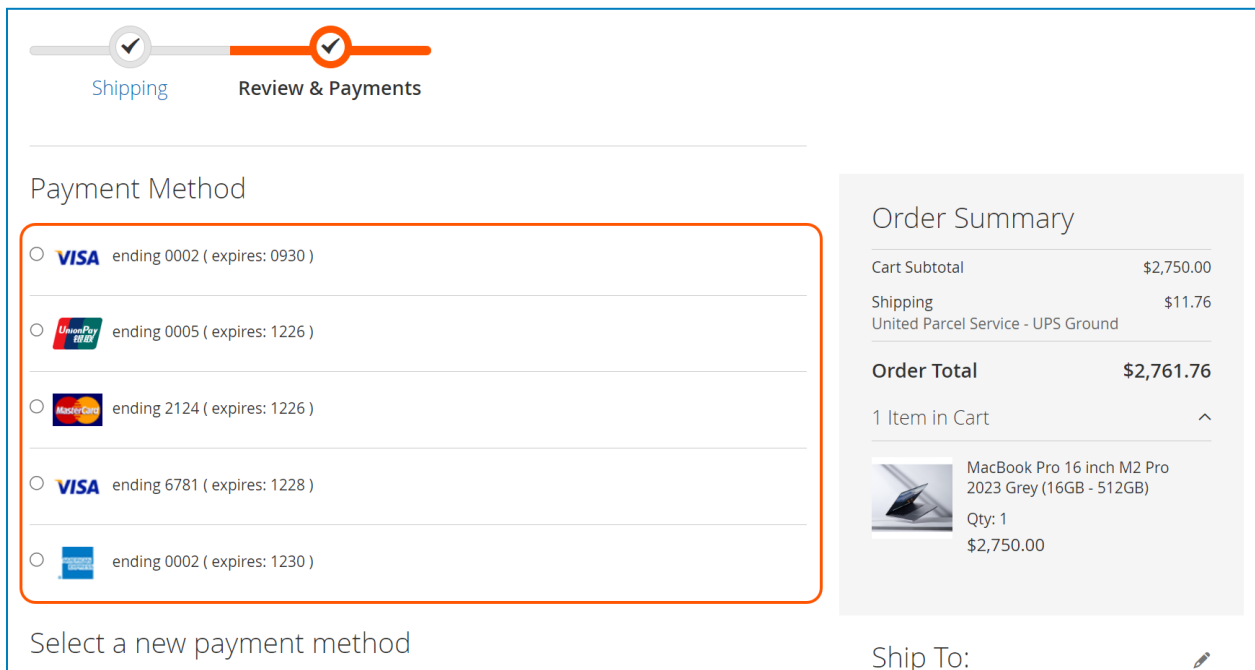


The screenshot shows the Magento customer information page for Michael Cao. The left sidebar contains navigation options: Dashboard, Sales, Catalog, Magezon, SMTP, Customers, Marketing, Content, Reports, Stores, and System. The 'Customers' section is expanded, and the 'Saved Cards' tab is selected. The main content area displays a table of saved cards for Michael Cao.

| Card Holder | Card Number | Expiration Date | Card Type   | Action  |
|-------------|-------------|-----------------|-------------|---|
| Michael Cao | ending 0002 | 09/30           | Visa        | <a href="#">Edit</a>   <a href="#">Delete</a> |
| Michael Cao | ending 0005 | 12/26           | CUP         | <a href="#">Edit</a>   <a href="#">Delete</a> |
| Michael Cao | ending 2124 | 12/26           | Master Card | <a href="#">Edit</a>   <a href="#">Delete</a> |
| Michael Cao | ending 6781 | 12/28           | Visa        | <a href="#">Edit</a>   <a href="#">Delete</a> |
| Michael Cao | ending 0002 | 12/30           | Amex        | <a href="#">Edit</a>   <a href="#">Delete</a> |

## 4. Pay With Stored Cards


Once the card is stored, customers can use it to initiate a payment. On the checkout page, the stored cards will be visible in the **Payment Method** section and customers can select one of them to pay for the next order.



The screenshot shows a checkout page with a progress bar at the top. The 'Shipping' step is completed, and the 'Review & Payments' step is active. The 'Payment Method' section is highlighted with an orange border and contains a list of five stored cards:

- VISA ending 0002 ( expires: 0930 )
- UnionPay ending 0005 ( expires: 1226 )
- MasterCard ending 2124 ( expires: 1226 )
- VISA ending 6781 ( expires: 1228 )
- ending 0002 ( expires: 1230 )

Below the list is the text 'Select a new payment method'. To the right, the 'Order Summary' sidebar shows:

| Order Summary   |   |
|---|---|
| Cart Subtotal   | \$2,750.00  |
| Shipping<br>United Parcel Service - UPS Ground  | \$11.76   |
| <b>Order Total</b>  | <b>\$2,761.76</b>   |
| 1 Item in Cart ^  |   |
|  | MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)<br>Qty: 1<br>\$2,750.00 |

At the bottom right, there is a 'Ship To:' field with an edit icon.





When creating a new order from your Magento backend, you should select **Stored Cards (ConvergeGateway)** and choose one of the stored cards for payment.

Create New Order for Michael Cao in Default Stor... Cancel Link Cart Submit Order

---

Payment & Shipping information

**Payment Method**

- Purchase Order
- Bank Transfer Payment
- Stored Cards (ConvergeGateway)
  -  ending 0002 (expires: 0930)
  -  ending 2124 (expires: 1226)
  -  ending 6781 (expires: 1228)
  -  ending 0002 (expires: 1230)
- Payment method (ConvergeGateway)

**Shipping Method \***

[Get shipping methods and rates](#)

---

**Order Total**

---

**Order History** **Order Totals**

**Order Comments** Subtotal **\$15.00**

## V) Payment With Subscription Products

### 1. Configure Subscriptions for a Product

With the recurring functionality enabled, you can configure subscriptions for a product. On the product edit page, you can see the **Subscription Options** and **Converge Subscription** tabs.



- In the **Converge Subscription** tab, set **Enable** to Yes so that the product can be purchased as a subscription. After that, customize the **Subscription Options**:

- **Billing Cycle:** this option represents the frequency of the recurring payments and can have one of the following values: Daily, Weekly, Biweekly, Semimonthly, Monthly, Bimonthly, Quarterly, Semester, Semiannually and Annually.
- **Bill on Half:** this option is available only if the Billing Cycle is Semimonthly. The values for this field are: 1st and the 15th of the month and 15th and the last day of the month.



- **End of Month:** this option is available only if the Billing Cycle is Monthly, Bi-Monthly, Quarterly, Semester or Semi-Annually, Annually. The values for this field are: Yes and No.
- **Price:** this option represents the value that will be added (if positive) or subtracted (if negative) to/from the product price. Please do not define a negative price higher than the product price.
- **Price Type:** this field has two options: “Fixed” and “Percent.” The default value is “Fixed”.

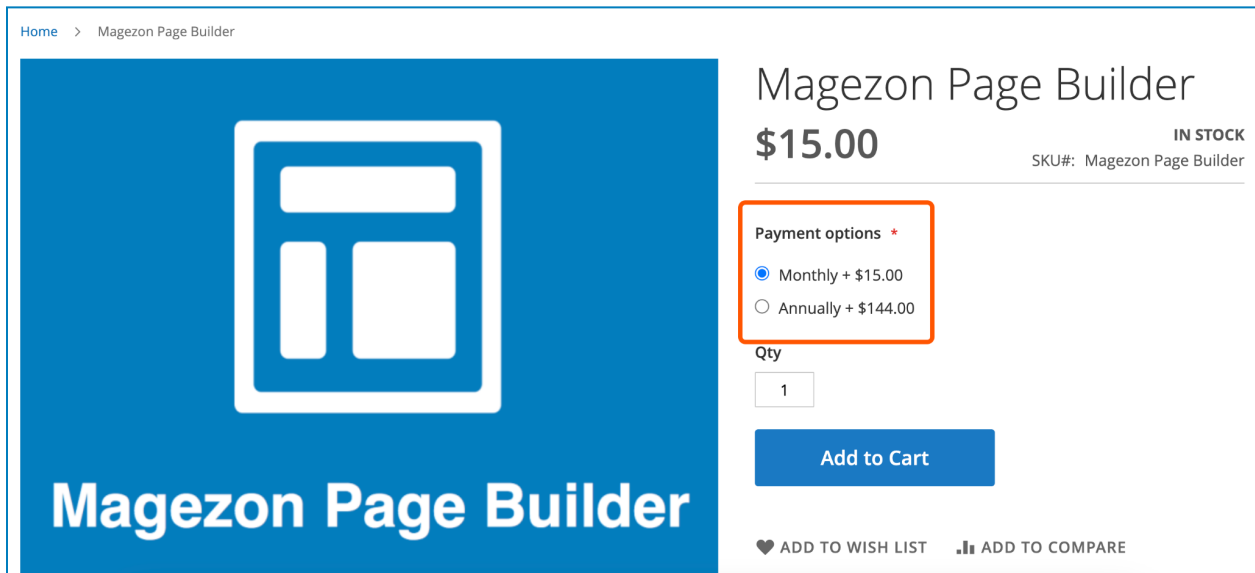
**Converge Subscription** ⊞

**Enable**  Yes  
[global]

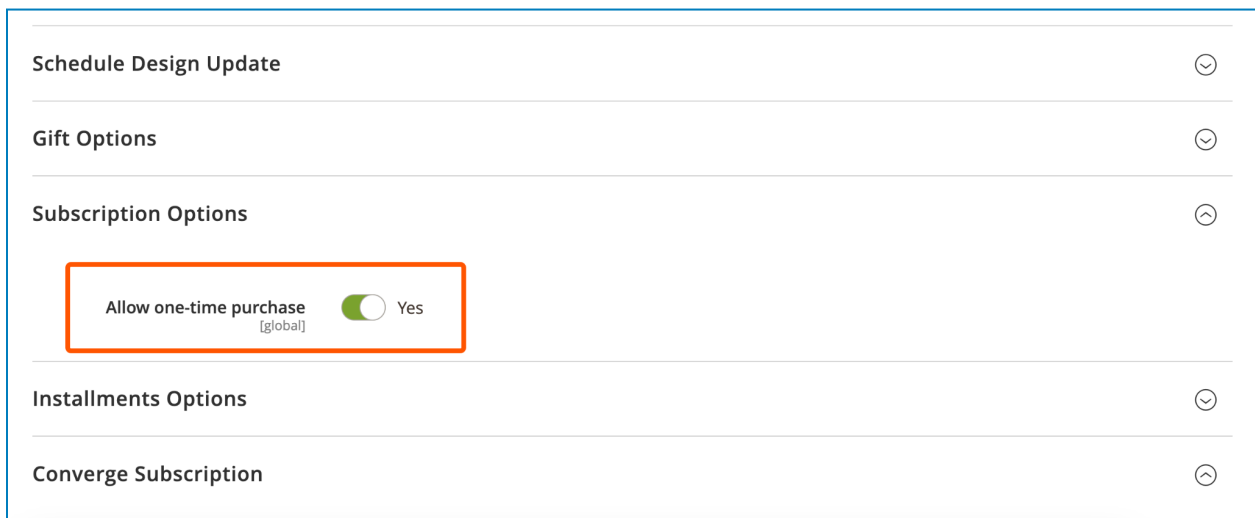
**Subscription Options**

| Billing Cycle                                 | Bill on Half | End of Month                            | Price     | Price Type                                 |    |
|---|--------------|---|-----------|--|----|
| Monthly <span style="float: right;">▼</span>  |              | No <span style="float: right;">▼</span> | \$ 15.00  | Fixed <span style="float: right;">▼</span> | 🗑️ |
| Annually <span style="float: right;">▼</span> |              | No <span style="float: right;">▼</span> | \$ 144.00 | Fixed <span style="float: right;">▼</span> | 🗑️ |

On the product page, customers can select their preferred subscription option in the **Payment options** section. After selecting an option, they will see the product price changing based on the price for the selected subscription.



- In the **Subscription Options** tab, you can enable the **Allow one-time purchase** option that lets customers make a one-time payment for the product instead of making recurring payments.



On the product page, the **One time purchase** option will be visible in the **Payment options** section.

Home > Magezon Page Builder



## Magezon Page Builder

**\$0.00**

IN STOCK

SKU#: Magezon Page Builder

Payment options \*

- One time purchase
- Monthly + \$15.00
- Annually + \$144.00

Qty

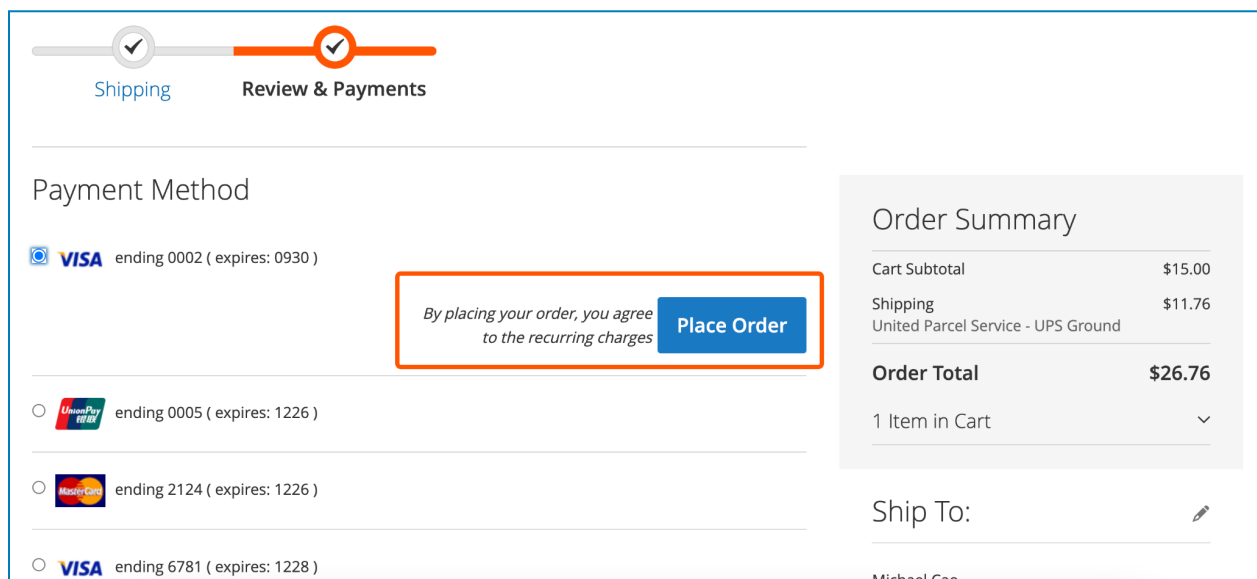
1

Add to Cart

♥ ADD TO WISH LIST    📊 ADD TO COMPARE

## 2. Pay for Subscription Products

Customers will create an order with subscription products via Converge gateway as usual. When choosing to pay with an already saved card, a message is displayed next to the Place Order button (This message is defined in the **Disclosure message for subscription/installment options** field in the configuration).



If paying with a new card via Converge gateway is selected, this message is also displayed next to the Place Order button:

## Select a new payment method

 PayPal Express Checkout [What is PayPal?](#)

Payment method (ConvergeGateway)

Michael Cao  
556 Scranton Road  
San Diego, California 92121  
United States  
[0123456789](#)

Credit Card



Credit Card Number \*

\*\*\*\* \* 1234 5678 9010

Expiration Date \*

MM / YY

Card Verification Number \*

\*\*\*\* ?

Save for later use. ?

556 Scranton Road  
San Diego, California 92121  
United States  
[0123456789](#)

Shipping   
Method:

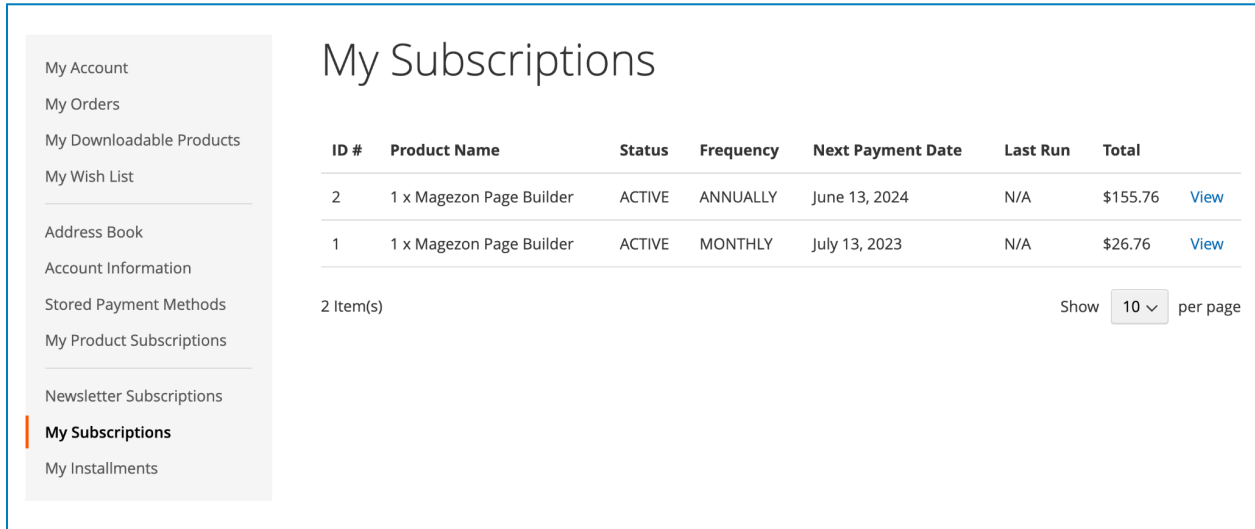
United Parcel Service - UPS  
Ground

*By placing your order, you agree  
to recurring charges*

**Place Order**

### 3. View Subscriptions

Customers can view their subscriptions by navigating to their account dashboard and opening the **My Subscriptions** section:



| ID # | Product Name             | Status | Frequency | Next Payment Date | Last Run | Total    |                      |
|------|--------------------------|--------|-----------|-------------------|----------|----------|----------------------|
| 2    | 1 x Magezon Page Builder | ACTIVE | ANNUALLY  | June 13, 2024     | N/A      | \$155.76 | <a href="#">View</a> |
| 1    | 1 x Magezon Page Builder | ACTIVE | MONTHLY   | July 13, 2023     | N/A      | \$26.76  | <a href="#">View</a> |

2 Item(s) Show  per page

Click **View** to view the subscription details:

My Account

My Orders

My Downloadable Products

My Wish List

---

Address Book

Account Information

Stored Payment Methods

My Product Subscriptions


---

Newsletter Subscriptions

My Subscriptions

My Installments

## Subscription Details ACTIVE

| Item  | Product Name         | Price                 | Qty                | Subtotal        |
|---|----------------------|-----------------------|--------------------|-----------------|
|  | Magezon Page Builder | \$144.00              | 1                  | \$144.00        |
|   |                      | Shipping and Handling |                    | \$11.76         |
|   |                      | Discount              |                    | \$0.00          |
|   |                      | Tax                   |                    | \$0.00          |
|   |                      |                       | <b>Grand Total</b> | <b>\$155.76</b> |

### Details

**Billing Address:**

Michael Cao  
556 Scranton Road  
San Diego, California, 92121  
United States  
T: 0123456789

**Shipping Address:**

Michael Cao  
556 Scranton Road  
San Diego, California, 92121  
United States  
T: 0123456789

### Subscription

New subscription created

**Frequency:** MONTHLY

**Start Payment Date:** July 13, 2023

**Next Payment Date:** July 13, 2023

**Last Run:** N/A

### History

| Date          | Order      | Description              |
|---------------|------------|--------------------------|
| June 13, 2023 | #000000392 | New subscription created |

Compare Products

You have no items to compare.

---

Recently Ordered

Last Ordered Items

MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)

[Add to Cart](#) [View All](#)

---

My Wish List

Last Added Items

You have no items in your wish list.

- From the backend, you can also navigate to **Sales > Subscriptions...**

You can browse and place orders, but nothing will be processed.

20 per page 1 of 1

| Product                | Status | Frequency | Next Payment Date   | Last Run | Total    | Action               |
|------------------------|--------|-----------|---------------------|----------|----------|----------------------|
| x Magezon Page Builder | ACTIVE | MONTHLY   | 2023-07-13 00:00:00 |          | 41.7600  | <a href="#">Edit</a> |
| x Magezon Page Builder | ACTIVE | ANNUALLY  | 2024-06-13 00:00:00 |          | 155.7600 | <a href="#">Edit</a> |
| x Magezon Page Builder | ACTIVE | MONTHLY   | 2023-07-13 00:00:00 |          | 26.7600  | <a href="#">Edit</a> |

Commerce Inc. All rights reserved. Magento ver. 2.4.6  
[Privacy Policy](#) | [Account Activity](#) | [Report an Issue](#)

...to view all subscriptions of your store:

## Subscriptions

3 records found 20 per page 1 of 1

| ID ↑ | User        | Product                  | Status | Frequency | Next Payment Date   | Last Run | Total    | Action               |
|------|-------------|--------------------------|--------|-----------|---------------------|----------|----------|----------------------|
| 3    | Michael Cao | 2 x Magezon Page Builder | ACTIVE | MONTHLY   | 2023-07-13 00:00:00 |          | 41.7600  | <a href="#">Edit</a> |
| 2    | Michael Cao | 1 x Magezon Page Builder | ACTIVE | ANNUALLY  | 2024-06-13 00:00:00 |          | 155.7600 | <a href="#">Edit</a> |
| 1    | Michael Cao | 1 x Magezon Page Builder | ACTIVE | MONTHLY   | 2023-07-13 00:00:00 |          | 26.7600  | <a href="#">Edit</a> |

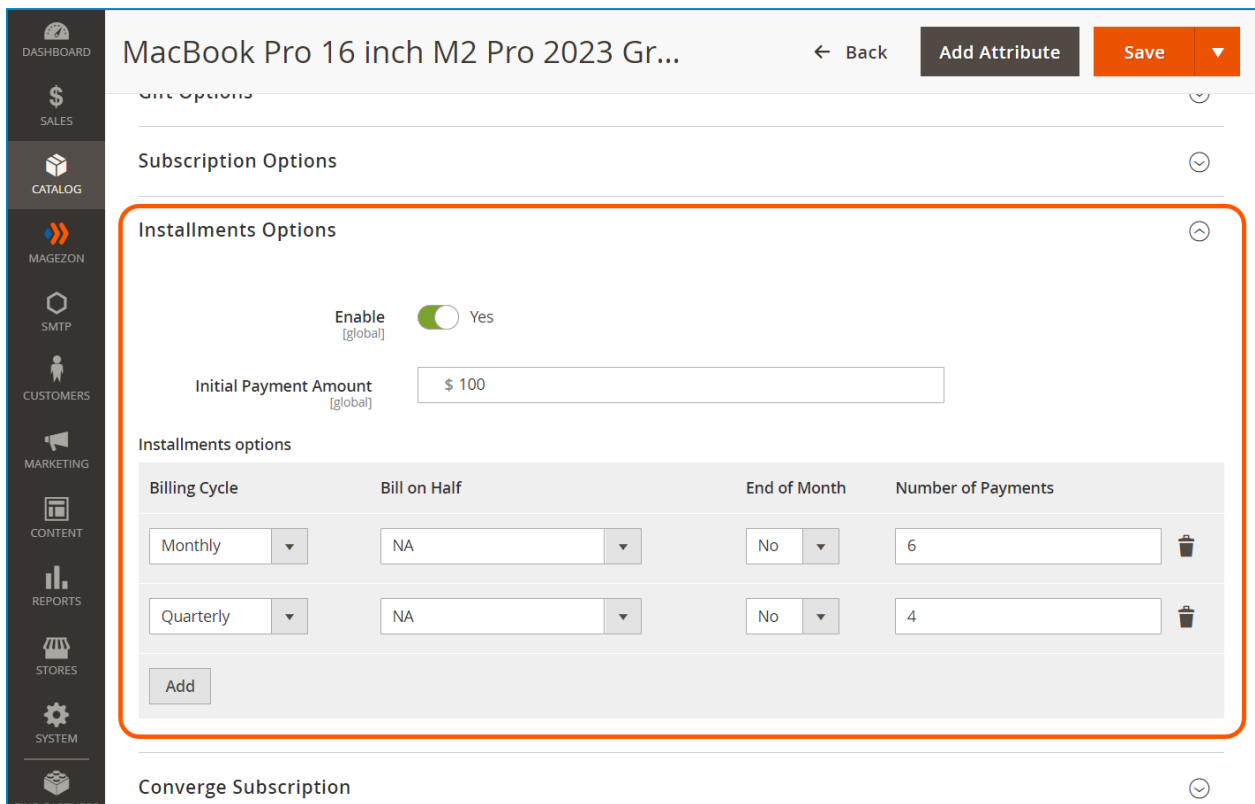
Copyright © 2023 Magento Commerce Inc. All rights reserved. Magento ver. 2.4.6  
[Privacy Policy](#) | [Account Activity](#) | [Report an Issue](#)



## VI) Payment With Installment Products

### 1. Configure Installments for a Product

With the installment functionality enabled, you can configure installments for a product. On the product edit page, you will see the **Installments Options** tab.



Set **Enable** to Yes to enable installment payments for the product. Fill the **Initial Payment Amount** that a customer should pay initially. Then customize the **Installments options**:

- Billing Cycle:** this option represents the frequency of the installment payments and can have one of the following values: Daily, Weekly, Biweekly, Semimonthly, Monthly, Bimonthly, Quarterly, Semester, Semiannually and Annually.

- **Bill on Half:** this option is available only if the Billing Cycle is Semimonthly. The values for this field are: 1st and the 15th of the month and 15th and the last day of the month.
- **End of Month:** this option is available only if the Billing Cycle is Monthly, Bi-Monthly, Quarterly, Semester or Semi-Annually, Annually. The values for this field are: Yes and No.
- **Number of Payments:** this option defines the number of installments a customer should pay.

On the product page, customers can select an installments option for the product.



Home > MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)

MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)

**\$2,750.00** IN STOCK  
SKU#: MAC16M22023

Pay Now \$100.00 and rest with easy installments  
Select Installments  
6 MONTHLY installments

Qty: 1

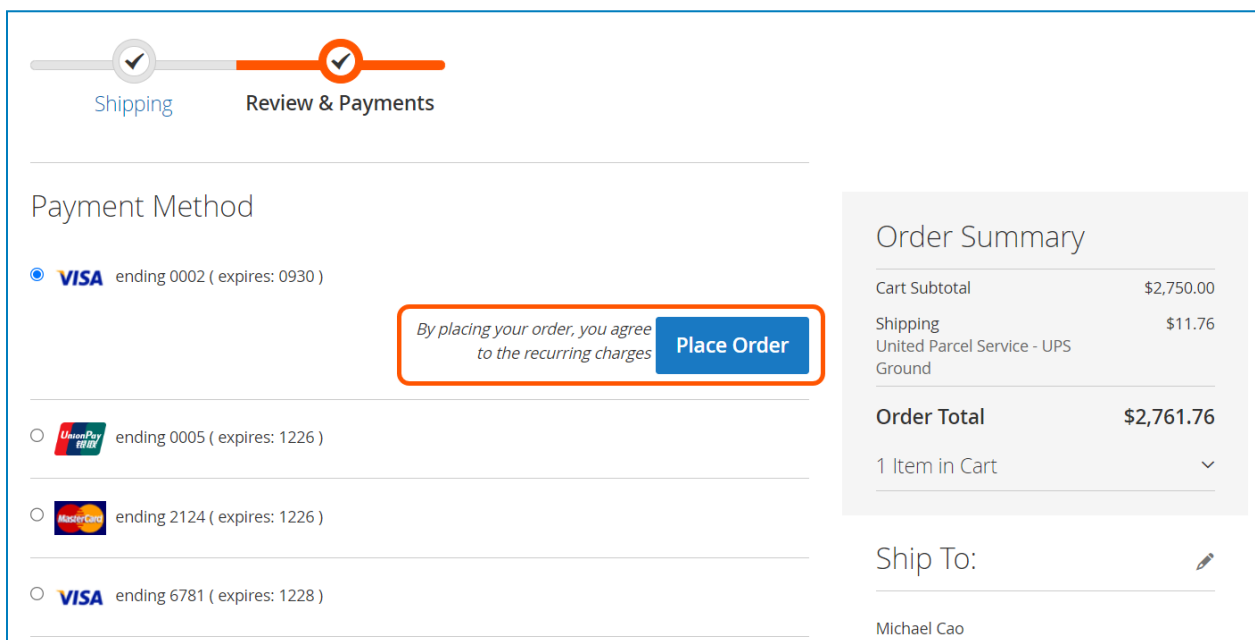
[Add to Cart](#)

Check out with  

With installment products, customers will place an order as usual.

## 2. Pay for Installment Products

Customers will create an order with installment products via Converge gateway as usual. When choosing to pay with an already saved card, a message is displayed next to the Place Order button (This message is defined in the **Disclosure message for subscription/installment options** field in the configuration).



The screenshot shows a checkout page with a progress bar at the top. The first step, 'Shipping', is completed with a checkmark. The second step, 'Review & Payments', is active and highlighted in orange. Below the progress bar, the 'Payment Method' section lists four options: a selected VISA card (ending 0002, expires 0930), a UnionPay card (ending 0005, expires 1226), a MasterCard (ending 2124, expires 1226), and another VISA card (ending 6781, expires 1228). A blue 'Place Order' button is highlighted with an orange border, and a message next to it reads: 'By placing your order, you agree to the recurring charges'. To the right, the 'Order Summary' shows a Cart Subtotal of \$2,750.00, Shipping of \$11.76 (United Parcel Service - UPS Ground), and an Order Total of \$2,761.76. Below the summary, the shipping address is listed as 'Ship To: Michael Cao'.

If paying with a new card is selected, this message is also displayed next to the Place Order button:

## Select a new payment method

 PayPal Express Checkout [What is PayPal?](#)

Payment method (ConvergeGateway)

Michael Cao  
556 Scranton Road  
San Diego, California 92121  
United States  
0123456789

Credit Card



Credit Card Number \*

\*\*\*\* \* 1234 5678 9010

Expiration Date \*

MM / YY

Card Verification Number \*

\*\*\*\* ?

Save for later use. ?

556 Scranton Road  
San Diego, California 92121  
United States  
0123456789

Shipping Method: 

United Parcel Service - UPS Ground

By placing your order, you agree to the recurring charges

## 3. View Installments

Customers can view their installments by navigating to their account dashboard and opening the **My Installments** section:

- My Account
- My Orders
- My Downloadable Products
- My Wish List

---

- Address Book
- Account Information
- Stored Payment Methods
- My Product Subscriptions

---

- Newsletter Subscriptions
- My Subscriptions
- My Installments

### My Installments

| ID # | Product Name  | Paid Amount | Due Amount | Paid Installments | Due Installments | Last Payment Date | Status                       |
|------|---|-------------|------------|-------------------|------------------|-------------------|------------------------------|
| 69   | 1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 4                | July 16, 2023     | Pending <a href="#">View</a> |
| 62   | 1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 6                | July 16, 2023     | Pending <a href="#">View</a> |

6 Item(s) Show  per page

Click **View** to view installment details including Amount, Due Date, Paid Date, Order, and Status:

- My Account
- My Orders
- My Downloadable Products
- My Wish List

---

- Address Book
- Account Information
- Stored Payment Methods
- My Product Subscriptions

---

- Newsletter Subscriptions
- My Subscriptions
- My Installments

### Installment Details

PENDING

| Amount   | Due Date         | Paid Date     | Order      | Status  |
|----------|------------------|---------------|------------|---------|
| \$665.44 | July 17, 2024    | N/A           | #000000543 | Pending |
| \$665.44 | April 17, 2024   | N/A           | #000000543 | Pending |
| \$665.44 | January 17, 2024 | N/A           | #000000543 | Pending |
| \$665.44 | October 17, 2023 | N/A           | #000000543 | Pending |
| \$100.00 | N/A              | July 16, 2023 | #000000543 | Paid    |

5 Item(s) Show  per page

On the order view page in the backend, you can open the **Installments** tab to view installments of the order.

#000000543 ← Back   Login as Customer   Send Email   Credit Memo   Reorder

---

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions
- Installments

Filters

1 records found 20 per page < 1 of 1 >

| ID ↑ | Customer Name | Product Name  | Paid Amount | Due Amount | Paid Installments | Due Installments | Last Payment Date        | Status  | Action               |
|------|---------------|---|-------------|------------|-------------------|------------------|--------------------------|---------|----------------------|
| 69   | Michael Cao   | 1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 4                | Jul 16, 2023 11:39:19 PM | Pending | <a href="#">Edit</a> |

Click **Edit** in the **Action** column and you can edit the payment information by clicking the Modify Payment Information button.

### Installment Details

Modify Payment Information

|    |             |          |            |                     |         |
|----|-------------|----------|------------|---------------------|---------|
| 72 | Michael Cao | 0.0000   | 2024-04-17 | N/A                 | Pending |
| 71 | Michael Cao | 0.0000   | 2024-01-17 | N/A                 | Pending |
| 70 | Michael Cao | 0.0000   | 2023-10-17 | N/A                 | Pending |
| 69 | Michael Cao | 100.0000 | N/A        | 2023-07-16 23:39:19 | Paid    |

**Payment Information**

**Card Details**

Card Number: 40\*\*\*\*\*6781

Expiration Date: 12/28

**Billing Address**

First Name: Michael

Last Name: Cao

Street: 556 Scranton Road

City: San Diego

Zip Code: 92121

Country: United States

- You can also navigate to **Sales > Installments...**

The screenshot shows the Magezon dashboard with the 'Sales' menu open. The 'Installments' option is highlighted with an orange box. The main content area shows a table of installment records for two MacBook Pro laptops.

| Product Name  | Paid Amount | Due Amount | Paid Installments | Due Installments | Last Payment Date        | Status  | Action               |
|---|-------------|------------|-------------------|------------------|--------------------------|---------|----------------------|
| MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 4                | Jul 16, 2023 11:39:19 PM | Pending | <a href="#">Edit</a> |
| MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 6                | Jul 16, 2023 11:38:02 PM | Pending | <a href="#">Edit</a> |

...to view all installments of your store and **Edit** them:

The screenshot shows the 'Installments' page in the Magezon dashboard. It displays a table with 7 records found. The table columns include ID, Customer Name, Product Name, Paid Amount, Due Amount, Paid Installments, Due Installments, Last Payment Date, Status, and Action.

| ID ↑ | Customer Name | Product Name  | Paid Amount | Due Amount | Paid Installments | Due Installments | Last Payment Date        | Status  | Action               |
|------|---------------|---|-------------|------------|-------------------|------------------|--------------------------|---------|----------------------|
| 1    | Michael Cao   | 1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 4                | Jul 16, 2023 11:39:19 PM | Pending | <a href="#">Edit</a> |
| 2    | Michael Cao   | 1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB) | \$100.00    | \$2,661.76 | 0                 | 6                | Jul 16, 2023 11:38:02 PM | Pending | <a href="#">Edit</a> |

## VII) Support

If you have any questions or need any support, feel free to contact us via the following ways. We will get back to you within 24 hours after you submit your support request.

- Submit [contact form](#).
- Email us at [support@magezon.com](mailto:support@magezon.com).
- Submit a [ticket](#).
- Contact us through [Skype](#): support@magezon.com.
- Contact us via live chat on our [website](#).