

Magento Dunning Module Installation Manual

This manual shows you how to install and use the Magento Dunning module. This extension can be purchased at www.sellxed.com/shop

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1 Introduction

First of all, thank you for placing your trust in us and purchasing the Magento Dunning extension. This document contains everything you need to know in order to install and configure the Magento Dunning extension. The following modules are within the scope of the Magento Dunning extension:

- Magento Dunning Extension
- PDF-Template

Please be advised that this product will be replaced by our new Magento offering on wallee. More information can be found on our [Magento Page](#).

Note that you must use at least PHP version 5.6 for our plugins. PHP 8 or higher is currently not supported.

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Installation Service

Our payment plugins should have per default the correct settings for most of our customers' preferences. That means once you have entered the required credentials in the plugin configuration to connect your account to your website, the plugin should be fully operational. Should you be willing to receive detailed information on a setting you do not know, you may contact our support team who will be able to assist you further.

Our support team is at your disposal during regular business hours at: <http://www.sellxed.com/support>. Furthermore, you have the option of ordering our installation service. We will make sure the plugin is installed correctly in your shop: <http://www.sellxed.com/shop/de/integration-und-installation.html>

```
####conditional####
```

2 Installation

At this point you should already be in possession of the module. If not, the module files should be available in your customer account here: [sellxed Shop](#) (Menu item "My Downloads"). In order to install the module in your Magento Shop, please follow these steps:

1. Create a backup of your shop
2. Extract the contents of the Zip you downloaded from the shop
3. Copy the **complete content** of the folder "files" into the main directory of the server where your shop is hosted. In order to do this, use your usual FTP program. Make sure to merge the folders instead of replacing them
4. Empty the cache and log into your shop again

3 Dunning - Configuration

3.1 Basic Settings

The descriptions for the options contain the necessary information. In the following, we will only mention a few key pointers regarding the options for the configuration.

3.1.1 Activating Dunning for any Desired Payment Method

To change the basic settings, go to System > Configuration > Dunning.

In the basic settings we will configure the dunning option for the individual payment methods. You can link any payment method to the Dunning extension by selecting them in the list. Click on the button add to create a new dunning process. If you want to use the Dunning extension for invoices we recommend you to use the included payment method „Invoice (Dunning Module)“.

Dunning

General Settings

Payment Methods [STORE VIEW]

- Saved CC
- Check / Money Order
- Zero Subtotal Checkout
- Purchase Order
- Bank Transfer Payment
- Cash On Delivery Payment
- Authorize.net
- Merchant Location
- PayPal All-in-One Payment Solutions *Accept and process credit cards and PayPal payments.*
- PayPal Payment Gateways
- PayPal Express Checkout
- PayPal Payment Solutions
- Authorize.net Direct Post
- Invoice (Dunning Module)

▲ Select the payment methods for which reminders should be created.

Figure 3.1: Base settings of the plugin.

3.2 Reminder Settings

The reminder settings can be adjusted at System > Configuration > Reminder.

3.2.1 Dunning Level

The reminder system is flexible. You can define the dunning levels according to your processes and preferences.

Reminder

Enabled	Yes	[STORE VIEW]
Email Sender	General Contact	[STORE VIEW]
Email Template	Invoice Reminder (Default Template from Loca	[STORE VIEW]
Email Template for Guest	Invoice Reminder Guest (Default Template for	[STORE VIEW]
Send Email Copy To	info@your-email.com	[STORE VIEW]
	<small>▲ Comma-separated</small>	
Send Email Copy Method	Bcc	[STORE VIEW]
Tax Class for Reminder Fee	None	[WEBSITE]
Reminder Fee Prices	Excluding Tax	[WEBSITE]
	<small>▲ Whether reminder fees entered by admin include tax.</small>	
Levels	<div style="display: flex; gap: 10px;"> + More - Less x None </div>	[STORE VIEW]

Reminder 1

Reminder Fee

▲ You can define fees that the customer is charged with if you send him a reminder. The amounts are added up.

Reminder Period

▲ Enter the number of days until a customer will be set to this reminder level unless the invoice is paid.

Reminder Type

Email

▲ Reminder Type

PDF Title

▲ The title of your standard invoice will be replaced for the reminder.

PDF Text

First Reminder

▲ Write a short information to your customers. This text will replace the Free Text Box After Document

Figure 3.1: Dunning level configuration

- The length of the dunning level [in days] corresponds to the amount of time between the order and the classification to this level. The update is conducted along with each reminder round (c.f. below).
- Reminder type: E-Mail: The reminder is sent as an e-Mail. The template can be adjusted in compliance with the Magento standard at System > Transaction e-Mails.
- PDF Print: The invoice is provided as a PDF document and can be printed out to be sent via postal service.
- PDF Title / PDF Text: If you want to use the provided customweb PDF extension to produce the documents, you can define a document title as well as a text after the document information (PDF extension below).

This way you can create as many dunning levels as you wish.

4 Invoice PDF Configuration

The Dunning extension also includes a comprehensive PDF extension, which allows you to adjust the PDF templates according to your preferences. In general, all settings can be defined individually for each Store View. In addition, every document can be designed differently. All settings can be found at System > Configuration > PDF Templates.

The PDF extension follows the principle of template inheritance. You can configure the standard template according to your preferences. In the next step, adjust the elements you would like to change for each delivery, invoice and reminder template. Otherwise the standard template is used. The settings for the PDF template can be found at System > Configuration > PDF Templates. Every PDF element can be adjusted. You will find additional information on the format options in the next chapter.

4.1 Template Settings

4.1.1 General Settings

You can position the different elements of the invoice PDF according to the provided fields. Most options are self-explanatory. However we will discuss the most important fields briefly.

- **File Template [PDF]:** Here you can deposit a static background. The dynamic elements will be printed into this static PDF. Therefore, create a static PDF template which includes logo, sender, addresses etc.
- **Margins [in cm]:** The margins for the document will be defined in cm. These settings are relevant for longer continuous texts. When reaching the margin, a line break is entered automatically.

4.1.2 Positioning the PDF Elements

You can position the elements with cm specifications. The top left corner is the reference point for the specifications. Regarding the information fields, we distinguish between the relative (position depending on the last element) and absolute elements. Depending on the element, the information field is classified as absolute or relative. For most fields you can choose which position you prefer.

The relative position is given in the format x;y. x refers to the horizontal offset; y refers to the vertical offset with the top left corner as reference point.

Figure 4.1: Positioning example: Document title

4.1.3 Order Information:

In order to define the information fields shown here and to determine their order, use the following scheme: {Information Field;"Label";clearance from the left margin in cm}

The following labels can be given in the invoice:

Information field Description

Order Number	Order Number
OrderDate	Order Date
InvoiceNumber	Invoice Number
InvoiceState	Invoice State
PaymentMethod	Payment Method
OrderStatus	Order Status
InvoiceDate	Invoice Date

In order for the captions to be printed, the field captions have to be set to standard.

4.1.4 Customisation

In addition, you can make customised adjustments. Here we refer to the ZendPDF Framework documentation (http://framework.zend.com/apidoc/1.7/Zend_Pdf/Zend_Pdf_Page.html).

4.1.5 Using a Different PDF Extension

You can use the extension in combination with any PDF module which you might have installed and configured already. However, there are a few restrictions:

- The payment slip can only be attached to the last page
- The document title and content cannot be adjusted for each dunning level as shown above

In order to use your own extension, a few code adjustments have to be made. Adjust the category definition in the following file:

```
/app/code/local/Customweb/Dunning/Model/PdfTemplates/Invoice.php    the    class  
Customweb_Isr_Model_PdfTemplates_Invoice                            extends  
Customweb_PdfTemplates_Model_Invoice    should    be    replaced    with:    class  
Customweb_Isr_Model_PdfTemplates_Invoice extends {PDF Extension category which compiles  
the invoice PDF}
```

5 Working with the Magento Dunning Extension

Here you will find the most important information on how to employ the Magento Dunning Extension in the most efficient way.

5.1 Starting the Dunning Process

Within your Magento backend navigate to Sales > Invoices. This is where you will find all your existing invoices.

1. To start the dunning process, you may select the invoices you wish to process.
2. In the dropdown menu, select 'Process Reminders'. If you have previously not chosen any invoice, every entry will be reviewed. If an invoice is overdue, it is moved to the respective dunning level automatically and the customer will be informed via e-Mail or a PDF will be provided, depending on the settings defined above.
3. Click on Submit to start the dunning process for your selection

Invoices

Page 1 of 1 pages | View 20 per page | Total 8 records found

Export to: CSV Export Reset Filter Search

Select Visible | Unselect Visible | 2 items selected

	Invoice #	Invoice Date	Order #	Order Date	Bill to Name	Reminder Status	Reminder Level	Reminder Date	Status
<input type="checkbox"/>	200000003	15 Sep 2014 14:06:43	200000003	15 Sep 2014 14:06:43	Max Mustermann	Printed	3	26 Jun 2015	Paid
<input type="checkbox"/>	200000002	15 Sep 2014 13:55:51	200000002	15 Sep 2014 13:55:50	Max Mustermann	Ready to print	2	2 Jul 2015	Paid
<input checked="" type="checkbox"/>	100000005	15 Sep 2014 09:27:46	100000005	15 Sep 2014 09:27:46	Test Test	Printed	3	26 Jun 2015	Pending
<input checked="" type="checkbox"/>	200000001	26 Jul 2014 16:43:09	200000001	26 Jul 2014 16:43:09	Dan Lee	Email sent	4	-	Pending
<input type="checkbox"/>	100000004	7 Jul 2014 18:56:32	100000004	7 Jul 2014 18:56:32	Test Test	Ready to print	3	26 Jun 2015	Paid
<input type="checkbox"/>	100000003	23 Jun 2014 11:31:02	100000003	23 Jun 2014 11:31:02	Test Test	Email sent	1	23 Jun 2014	Paid
<input type="checkbox"/>	100000002	12 Jun 2014 17:02:43	100000001	12 Jun 2014 17:01:07	Test Test	Not reminded	0	13 Jun 2014	Paid
<input type="checkbox"/>	100000001	12 Jun 2014 17:01:54	100000002	12 Jun 2014 17:01:36	Test Test	Not reminded	0	13 Jun 2014	Paid

Figure 5.1: Running the dunning process for specific invoices.

The invoices will be processed accordingly and moved to the corresponding dunning level. The customer will be notified depending on your settings by mail or a PDF will be provided. In the column Reminder Status you will find the status of the invoice and will be able to determine whether an invoice has entered the dunning process or not. Just besides the status you can also check at which dunning level the invoice is currently placed.