

Invoicing, Tax and Stripe

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Introduction of Partial Invoice

Partial invoice: There are situations when Frans Team only ship a few quote addresses of a MS order.

For example, MS order has 3 Quote Addresses; but only 2 addresses are shipped. The order is now partially shipped.

Steps to process a Partial Shipped / Partial Invoiced Order

Steps to make a partial shipping/Partial invoiced order.

Step 1: Create a multiship order.

MS order can be created via backend other frontend. Make sure to have more than 1 Shipping Addresses. For example:

#800162 ← Back Quick Ship Accounting Invoice Cancel Send Email Hold Manual Capture Reorder Edit

Recipients (Quote Addresses) Mass Edit Create Shipments

Select	ID	Address	Products	Details	Totals
<input checked="" type="checkbox"/>	2175	Brian3 N3 14411 High Pine St Poway, California, 92064 United States T: 5593479999 Type: shipping Status: new Item Count: 2	<ul style="list-style-type: none">2 SIGNATURE-PAIRING-HOT-CHOCOLATE-TRAVEL-MUG-SIGNATURE1 EASTER-BUNNY-8PC-1_25OZ-WHITE-TEAL_FOIL	Shipping United Parcel Service - UPS Second Day Air ups_02 Planned Ship Date 07/10/2024 Preferred Arrival Date 07/11/2024 Special Instructions	Subtotal \$141.00 Shipping & Handling (United Parcel Service - UPS Second Day Air) \$15.00 Grand Total \$156.00
<input checked="" type="checkbox"/>	2176	Brian2 N2 7 W Norwich Ave Clovis, California, 93612 United States T: 6265609999 Type: shipping Status: new Item Count: 2	<ul style="list-style-type: none">1 SIGNATURE-PAIRING-HOT-CHOCOLATE-TRAVEL-MUG-SIGNATURE1 EASTER-BUNNY-8PC-1_25OZ-WHITE-TEAL_FOIL	Shipping FedEx - 2 Day Express fedex_FEDEX_2_DAY Planned Ship Date 07/10/2024 Preferred Arrival Date 07/11/2024 Special Instructions	Subtotal \$94.50 Shipping & Handling (FedEx - 2 Day Express)\$15.00 Grand Total \$109.50

Step 2: Ship to one of the addresses:

Click the QA

Quote Address #2175

Quote Address #2175

← Back Save Cancel Hold Needs Review **Create Shipment**

NEW Order #800162 Multiship 1 of 2 Next » No shipment made yet

Then click `Create Shipment`. Confirm that shipment was created successfully:

Quote Address #2175

Search, Notifications, User: ngxtri

✓ Shipment #100500080 Created for Quote Address #2175.

Quote Address #2175

← Back Print Hold **Cancel and Recreate Shipment**

READY TO PRINT Order #800162 Multiship 1 of 2 Next » Shipment #100500080

Shipping Address Ordered Items and Details Shipping Methods

Go into that shipment:

View Shipment #100500080

← Back Cancel Hold **Send Tracking Information**

Shipment Information

Shipment # 100500080 (The shipment confirmation email is not sent)

[Quote Address #2175](#) | [View Invoice](#) | [View in Shipping Manager](#)

Shipment Date	Jul 23, 2024
Quote Address Status	Ready To Print
Shipping Method	ups_02
Planned Ship Date	Wed 07/10/2024
Preferred Arrival Date	Thu 07/11/2024

Notice the Quote Address status is `Then click `View in Shipping Manager``

Shipment #100500080

1. Verify Shipping Address:

Brian3 N3
14411 High Pine St
Poway, CA 92064
5593479999

2. Verify Order Items to Ship:

SKU	Product	Order Qty	Ship Qty
SIGNATURE-PAIRING-HOT-CHOCOLATE-TRAVEL-MUG-SIGNATURE	Dark Hot Chocolate & Travel Mug	2	<input type="text" value="2.0000"/>
EASTER-BUNNY-8PC-1_25OZ-WHITE-TEAL_FOIL	8pc White Chocolate Bunnies	1	<input type="text" value="1.0000"/>

3. Select Ship Method

- FedEx 2 Day
- FedEx Ground
- FedEx Home Delivery
- FedEx Priority Overnight
- FedEx Standard Overnight
- United Parcel Service UPS Next Day Air
- United Parcel Service UPS Second Day Air (

Add Ice Packs

Re-Print Packing Slip

Print Shipping Label

create shipping label

When shipment was first created; it's in ``New`` status; it's not actually shipped yet. Click ``Print Shipping Label`` to actually ship it

Magento Admin | Fran's Chocolates

✓ Shipment #100500080 shipped successfully.

Shipment ID:

Go

Go back to the Quote Address, confirm that its status is now Shipped:

Quote Address #2175

SHIPPED Order #800162 Multiship 1 of 2 Next » Shipment #100500080

Shipping Address

First Name:

Last Name:

Company:

Street Line #1:

Street Line #2:

Ordered Items and Details

Product / SKU	Price	Qty	Total
Dark Hot Chocolate & Travel Mug SIGNATURE-PAIRING-HOT-CHOCOLATE-TRAVEL-MUG-SIGNATURE	\$46.50	<input type="text" value="2"/>	\$93.00
<input type="text" value="Product Notes"/>			
8pc White Chocolate Bunnies EASTER-BUNNY-8PC-1_25OZ-WHITE-TEAL_FOIL	\$48.00	<input type="text" value="1"/>	\$48.00
<input type="text" value="Product Notes"/>			

Step 3: Execute partial-email-and-invoice:

Go to the order. Then click button `Invoice & Capture`

Not secure sfran/FrAdMin/sales/order/view/order_id/311/

⚠ This is only a demo store. You can browse and place orders, but nothing will be processed.

⚠ One or more of the Cache Types are invalidated: Page Cache, Configuration. Please go to [Cache Management](#) and refresh cache types. System Messages: 4

#2100300 🔍 🔔 👤 ngxtri

← Back Order Email Hold Reorder Cover Accounting Invoice Customer Invoice Invoice & Capture Shipment Email Edit

Invoice & Capture will look for shipments that have been shipped but not emailed; and not invoiced yet.

Invoice & Capture email those shipments; then create invoice for those shipments. For email, there is no restrictions. All shipments will be emailed. But for invoicing, there is **an additional check** at ShipmentEmailSender.php, line 122, if(!\$order->isReadyToInvoice()) continue. This means that if order is not ready to invoice; **order will not be invoiced; even though emails are sent**. In the future we might want to separate email vs invoice to make this more understandable.

If everything was successful; success message is shown:

#800162

sfran says
Success! email for 1 shipment(s) sent successfully | Invoice 15 created

← Back Cancel Send Email OK Accounting Invoice Daily Ship & Capture Edit

To verify, click `Invoices` tab:

#800162

← Back Cancel Send Email Credit Memo Hold Manual Capture Reorder Quick Invoice Accounti Invoice

Search by keyword Default View Columns Export Filters

Acti... 1 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	100400015	Jul 23, 2024 8:20:47 AM	800162	Jul 23, 2024 8:03:09 AM	chicago 2 day air N	Paid	\$156.00	View

ORDER VIEW
Information
Invoices
Credit Memos
Shipments

Invoice 1000400015 is the invoice created by `Daily Ship & Capture`.

Also, go to Admin -> Reports -> Multi-ship Email Log

Multi-Ship Email Log

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Add New Post

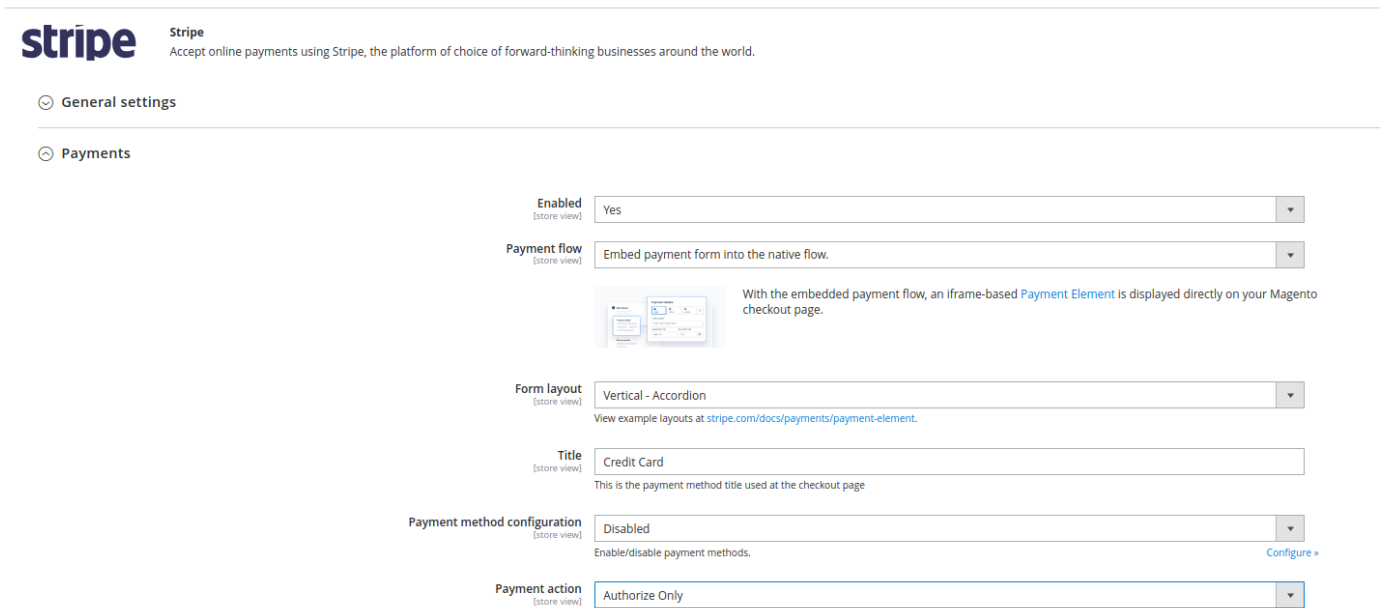
<input type="checkbox"/>	Created	Initiator	Email From	Email To	Sales Shipment ID	Raw Body	Processing Status	Processing Message
<input type="checkbox"/>	Jul 23, 2024 8:20:47 AM	ngxtri	orders@frans.com	someids@yahoo.com	80	Content ->=0A<tbl= e style=3D'border-collapse: collapse;'>=0A <tr class=3D'email-sum= many'>=0A <td style=3D'margin: 0; font-size: 14px; line-height: 1= 6px; color: #616161; font-family: arial,sans-serif; padding: 0 0 20px;'>=0A <p style=3D'padding: 0px; margin: 0; font-size: 14px; line-height: 16px; color: #616161; margin-bottom: 4px;'>=0A Your Fran=E2=80=99= Order has shipped.</p>=0A <p style=3D'padding: 0px; margin=20= 0; font-size: 14px; line-height: 16px; color: #616161; margin-bottom: 4px;'>=0A Please check the tracking link below for shipping updates.</p>=0A <h1 style=3D'padding: 0; font-size: 15px; line-height: 17px; margin: 0 0 4px 0;'>=0A Order Number # 800162</h1>=0A <h1 style=3D'padding: 0; font-size: 15px; line-height: 17px; margin: 0 0 4px 0;'>=0A Order Total =0A\$265.50</h1>=0A	1	email for 1 shipment(s) sent successfully
<input type="checkbox"/>	Jul 21, 2024 7:05:05 PM	ngxtri	orders@frans.com	someids@yahoo.com	79	Content ->=0A<tbl= e style=3D'border-collapse: collapse;'>=0A <tr class=3D'email-sum= many'>=0A <td style=3D'margin: 0; font-size: 14px; line-height: 1= 6px; color: #616161; font-family: arial,sans-serif; padding: 0 0 20px;'>=0A <p style=3D'padding: 0px; margin: 0; font-size: 14px; line-height: 16px; color: #616161; margin-bottom: 4px;'>=0A Your Fran=E2=80=99= Order has shipped.</p>=0A <p style=3D'padding: 0px; margin=20= 0; font-size: 14px; line-height: 16px; color: #616161; margin-bottom: 4px;'>=0A Please check the tracking link below for shipping updates.</p>=0A <h1 style=3D'padding: 0; font-size: 15px; line-height: 17px; margin: 0 0 4px 0;'>=0A Order Number # 800160</h1>=0A <h1 style=3D'padding: 0; font-size: 15px; line-height: 17px; margin: 0 0 4px 0;'>=0A Order Total =0A\$265.50</h1>=0A	1	email for 1 shipment(s) sent successfully

Search for the email sent to confirm that the shipment email was sent successfully.

Notice that Step 3 can also be executed programmatically via the MS partial invoice cron.

Stripe configs

1/ Frans uses Stripe in Pre-auth mode. Make sure your localhost environment also uses Pre-auth mode. In config, change `Payment action` to `Authorize Only`:




stripe Stripe
Accept online payments using Stripe, the platform of choice of forward-thinking businesses around the world.

General settings

Payments

Enabled (store view) Yes

Payment flow (store view) Embed payment form into the native flow.

 With the embedded payment flow, an Iframe-based [Payment Element](#) is displayed directly on your Magento checkout page.

Form layout (store view) Vertical - Accordion
View example layouts at stripe.com/docs/payments/payment-element.

Title (store view) Credit Card
This is the payment method title used at the checkout page.

Payment method configuration (store view) Disabled
Enable/disable payment methods. [Configure](#)

Payment action (store view) Authorize Only

2/ To debug local stripe connect (local webhook):

Install Stripe CLI

In command line, enter `stripe listen --forward-to http://sfran/stripe/webhooks`

Stripe cli will inform the webhook secret, such as:

...

> Ready! You are using Stripe API Version [2016-02-23]. Your webhook signing secret is
whsec_9980a4bbbf158f30d3288c6ea85d8f085123456c97bea7abe35a8adc62e4b8d4 (^C to quit)

...

Copy that secret into table `stripe_webhooks`, column `secret`. Make sure that table only has 1 row; to avoid confusion.

Future Ship Invoicing

There's a cron job that automatically invoices future orders:

```
group id="futureship">  
  <job instance="Frans\MultiShip\Cron\InvoiceFutureShips" method="execute"  
  name="future_ship_capture_cron">
```

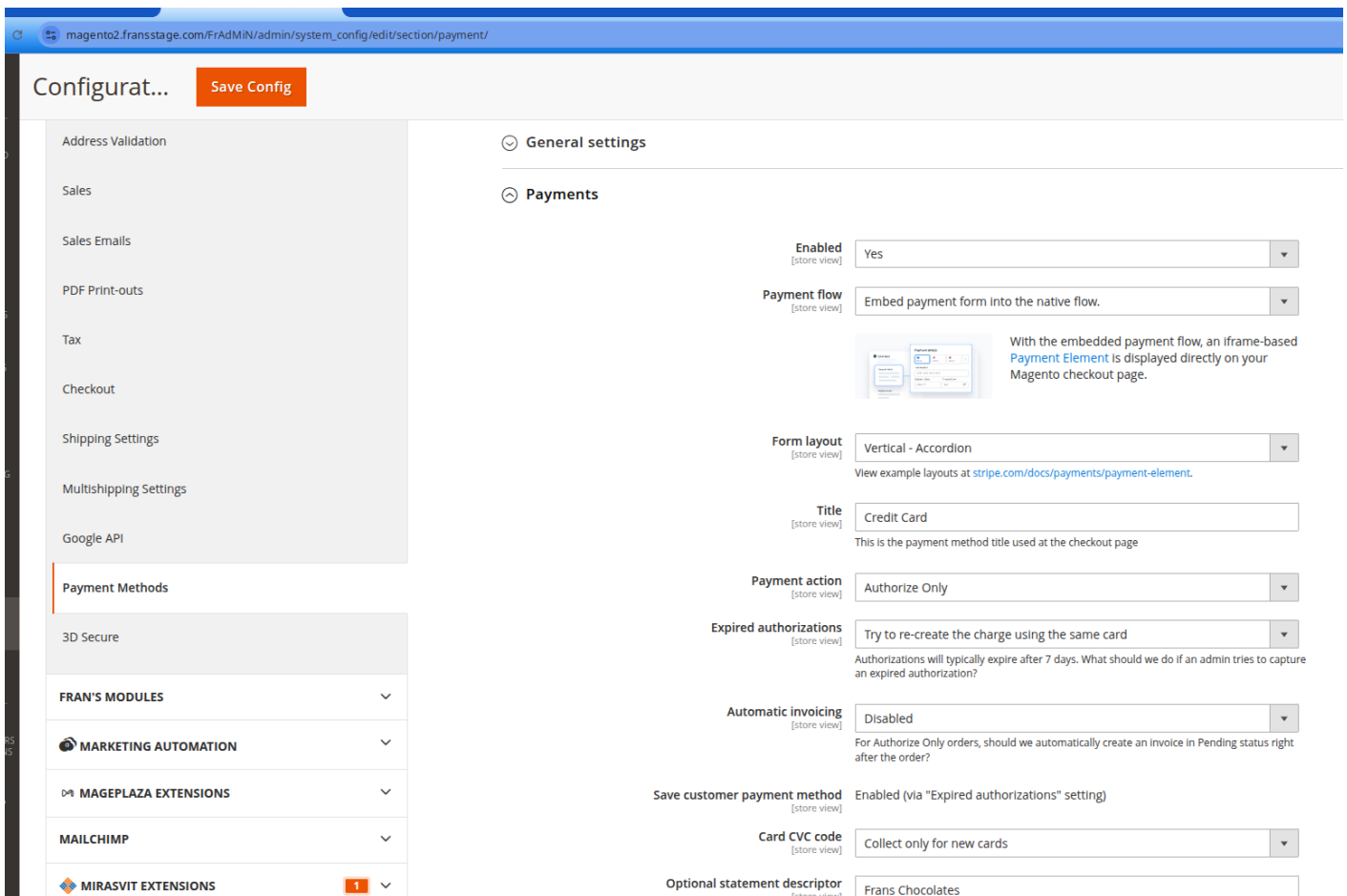
Bug with Stripe configs

`Save customer payment method`

04/04/2025:

There is a bug with Stripe config; specifically `Save Customer Payment Method`

Look at this setting:



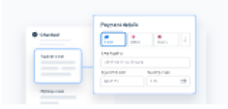
The screenshot shows the Magento 2 admin interface for configuring Stripe settings. The left sidebar contains a navigation menu with categories like 'Address Validation', 'Sales', 'Checkout', and 'Payment Methods'. The main content area is titled 'Configurat...' and features a 'Save Config' button. Under the 'Payments' section, the 'Save customer payment method' setting is set to 'Enabled (via "Expired authorizations" setting)'. Other settings include 'Enabled' (Yes), 'Payment flow' (Embed payment form into the native flow), 'Form layout' (Vertical - Accordion), 'Title' (Credit Card), 'Payment action' (Authorize Only), 'Expired authorizations' (Try to re-create the charge using the same card), 'Automatic invoicing' (Disabled), 'Card CVC code' (Collect only for new cards), and 'Optional statement descriptor' (Frans Chocolates).

It has `Expired Authorizations` = `Try to re-create the charge using the same card` and `Save customer payment method` = `Enabled via "Expired authorizations" setting` Even though it says `Save customer payment method` = Enabled; behind the scenes it's actually disabled. If you log in as a front-end customer, the link `Saved Payment Methods` is not shown.

To fix this bug; we need to make sure `Save customer payment method` flag is Enabled.

1/ First, switch `Expired authorization` to `Warn admin and don't capture` and click Save. This helps enable the drop-down for `Save customer payment method`:

Payments

Enabled <small>[store view]</small>	Yes
Payment flow <small>[store view]</small>	Embed payment form into the native flow.
	With the embedded payment flow, an iframe-based Payment Element is displayed directly on your Magento checkout page.
Form layout <small>[store view]</small>	Vertical - Accordion
	View example layouts at stripe.com/docs/payments/payment-element .
Title <small>[store view]</small>	Credit Card
	This is the payment method title used at the checkout page
Payment action <small>[store view]</small>	Authorize Only
Expired authorizations <small>[store view]</small>	Warn admin and don't capture
	Authorizations will typically expire after 7 days. What should we do if an admin tries to capture an expired authorization?
Automatic invoicing <small>[store view]</small>	Disabled
	For Authorize Only orders, should we automatically create an invoice in Pending status right after the order?
Save customer payment method <small>[store view]</small>	Disabled

2/ Notice that `Save customer payment method` flag is `Disabled`; which caused the bug we saw earlier. Switch it to `Enabled` and click Save.



Stripe

Accept online payments using Stripe, the platform of choice of forward-thinking businesses around the world.

General settings

Payments

Enabled [store view] Yes

Payment flow [store view] Embed payment form into the native flow.



With the embedded payment flow, an iframe-based [Payment Element](#) is displayed directly on your Magento checkout page.

Form layout [store view] Vertical - Accordion

View example layouts at stripe.com/docs/payments/payment-element.

Title [store view] Credit Card

This is the payment method title used at the checkout page

Payment action [store view] Authorize Only

Expired authorizations [store view] Warn admin and don't capture

Authorizations will typically expire after 7 days. What should we do if an admin tries to capture an expired authorization?

Automatic invoicing [store view] Disabled

For Authorize Only orders, should we automatically create an invoice in Pending status right after the order?

Save customer payment method [store view] Enabled

3/ Now that the flag `Save customer payment method` flag is Enabled; it's ok to switch back `Expired authorizations` to `Try to re-create the charge using the same card`; and click Save. Behind the scenes, the flag `Save customer payment method` flag was switched to Enabled. Verify by going to front-end customer dashboard, the button `Save Payment Methods` is now shown:



[Caramels](#)

[Truffles](#)

[Bars](#)

[Fruits & Nuts](#)

[Collections](#)

[Gift](#)

Your Account

[Your Orders](#)

[Address Book](#)

[Account Information](#)

[Newsletter Subscriptions](#)

[Saved Payment Methods](#)

[Log Out](#)

Your Account

Account Information

Welcome

We are delighted to assist you.

For questions with your account or help with large or custom orders, please call us at 800.422.3726 or email us at orders@frans.com.

Contact Information

Brian Nguyen

[EDIT](#) [CHANGE PASSWORD](#)

Use Magento Out-Of-Box tax

OOB tax setup for testing:

Magento 2 has useful Out-of-box (OOB) product tax and shipping tax (ship tax) features. This guide shows how to set them up.

Remember to disable third-party tax modules, such as Avatax

Step 1: Stores > Tax Zones and Rates : setup a tax zone e.g. CA or WA, wildcard / * for zip, tax rate e.g. 8.25%

fr.socialappsolutions.com/FrAdMiN/tax/rate/

No webhook events have been received for: Default Store View (Test Mode) - Please ensure that your webhooks URL is externally accessible and your cron jobs are running.

Amasty notice: Please go to [Configuration](#) and register your instance to avoid unlicensed product usage.

Tax Zones and Rates

[Add New Tax Rate](#)

Export to:

[Reset Filter](#)

8 records found per page of 1

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
<input type="text"/>	<input type="text" value="All Countries"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="From"/> <input type="text" value="To"/>
US-CA-*Rate 1	United States	CA	*	8.2500
ship_CA_825	United States	CA	*	8.2500
IL_625	United States	IL	*	6.2500
ship_IL_6265	United States	IL	*	6.2650
US-NY-*Rate 1	United States	NY	*	8.3750
OR_Zero_Tax	United States	OR	*	0.0000
VA_1	United States	VA	*	1.0000
ship_VA_zero	United States	VA	*	0.0000

Notice naming conventions, product tax is `IL_625`, ship tax is `ship_IL_6265`

Step 2: Add two tax rules, one for Product Tax and one for Ship Tax:

⚠ This is only a demo store. You can browse and place orders, but nothing will be processed.

⚠ No webhook events have been received for: Default Store View (Test Mode) - Please ensure that your webhooks URL is externally accessible and your cron jobs are running. System Messages: 1 ▾

⚠ Amasty notice: Please go to [Configuration](#) and register your instance to avoid unlicensed product usage.

Tax Rules

🔍 🔔 👤 ngxtri ▾

Add New Tax Rule

✔ You saved the tax rule.

Search [Reset Filter](#) 2 records found

20 ▾ per page < 1 of 1 >

Name	Customer Tax Class	Product Tax Class	Tax Rate	Priority	Subtotal Only	Sort Order
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Product_Tax	Retail Customer	Taxable Goods	US-CA-*Rate 1, US-NY-*Rate 1, OR_Zero_Tax, IL_625, VA_1	0	0	0
Shipping_taxes	Retail Customer	shipping_tax	ship_CA_825, ship_IL_6265, ship_VA_zero	0	0	0

Step 2a: Rule one: Product Taxes:

Tax Rule Information

Name *

Tax Rate *

5 selected

- ✓ US-CA-*Rate 1
- ✓ US-NY-*Rate 1
- ✓ OR_Zero_Tax
- ✓ IL_625
 - ship_CA_825
 - ship_IL_6265
- ✓ VA_1
 - ship_VA_zero

Additional Settings

Customer Tax Class *

Product Tax Class *

- Refund Adjustments
- Gift Options
- Order Gift Wrapping
- Item Gift Wrapping
- Printed Gift Card
- Reward Points
- shipping_tax

Step 2b: Rule two: Shipping taxes

← Back Delete Rule Reset Save and Continue Edit **Save Rule**

Tax Rule Information

Name *

Tax Rate *

3 selected

- US-CA*-Rate 1
- US-NY*-Rate 1
- OR_Zero_Tax
- IL_625
- ship_CA_825
- ship_IL_6265
- VA_1
- ship_VA_zero

Add New Tax Rate

Additional Settings

Customer Tax Class *

Add New Tax Class

Product Tax Class *

- Refund Adjustments
- Gift Options
- Order Gift Wrapping
- Item Gift Wrapping
- Printed Gift Card
- Reward Points
- shipping_tax

Add New Tax Class

Priority *

Tax rates at the same priority are added, others are compounded.

Notice, in Shipping_Taxes rule, in the ProductTaxClass, add a new class and name it **shipping_tax**

Step 3: Configure tax classes and rules

3a: Configure Ship Tax class as the **shipping_tax** class we created above

Scope: Default Config ?

Save Config

✓ You saved the configuration.

- GENERAL
- TECHGROUP EXTENSIONS
- SECURITY
- CATALOG

Stripe Tax

Tax Classes

Tax Class for Shipping [website]

shipping_tax

Use system value

3b: Configure Shipping Tax Price Calculation as `Including Tax`:

Calculation Settings

Tax Calculation Method Based On [website]

Total

Use system value

Tax Calculation Based On [website]

Shipping Address

Use system value

Catalog Prices [website]

Excluding Tax

Use system value

This sets whether catalog prices entered from Magento Admin include tax.

Shipping Prices [website]

Including Tax

Use system value

This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.

That's it.