

# RMA

for Magento 2



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RMA is a communication tool that helps handling product returns:

- Intuitive RMA submission form;
- Guest RMA support;
- Customizable RMA request reasons and options;
- Two-way notifications on RMA status updates.

The extension enhances overall product return experience for both store administrator and customer. Every RMA request has a dedicated chat thread where customer and store administrator can exchange relevant information.

Store customers are suggested to provide the relevant information on the returns by filling in the custom fields offered by the store administrator. The following input types are supported: Text Field, Text Area, Dropdown, Multiselect. Moreover, CMS blocks can be put along the way of an RMA process.

Store administrator RMA experience is further improved by the GUI aimed to simplify RMA management process and a handy RMA grid with filtering options and adjustable columns for better navigation.

## Reference table

**RMA** – Return Merchandize Authorization;

**RMA request** – a customer inquiry on returning the purchased item to the store.

## Getting around

RMA comes ready for work after installation.

Once installed the extension adds **My Returns** tab to the customer account page and **Create New Return** link to the store footer. Both lead to creating a new RMA request.

The screenshot displays the 'My Returns' section of a customer account dashboard. On the left is a navigation menu with options like 'Account Dashboard', 'Account Information', 'Address Book', 'My Downloadable Products', 'My Orders', 'Newsletter Subscriptions', 'My Returns' (highlighted), 'Billing Agreements', 'My Product Reviews', and 'My Wish List'. The main content area is titled 'My Returns' and features a 'Create New Return' button. Below the title is a table with columns: Return ID, Order ID, Product(s), Status, Updated At, and Created At. One return is listed with ID #000000004, Order ID #000000008, Product 'Rival Field Messenger', Status 'Pending Approval', and both Updated and Created At dates as 12/15/15. A 'View Request' link is provided for this entry. Below the table, it indicates '1 Item'.

Return ID	Order ID	Product(s)	Status	Updated At	Created At
#000000004	#000000008	Rival Field Messenger	Pending Approval	12/15/15	12/15/15

If the guest customer checkout is allowed, RMA extension may be set to let guest customers to ask for a return.

Guest customers can ask for an RMA by clicking **Create New Return** link in the store footer.

To ask for an RMA guest customers need to specify an email address which has been used for placing an order and specify the order number.

RMA requests can also be submitted from **order details page** of **My Orders** tab.

To request an RMA form **My Returns** section click **Create New Return** button.

Order	Order Date	Order Status	Order Total
<input type="radio"/> Order #000000008	Dec 15, 2015	Complete	\$50.00
<input checked="" type="radio"/> Order #000000007	Dec 15, 2015	Complete	\$59.00

Product	Items in order	Items for return available
<input checked="" type="checkbox"/> Radiant Tee	Ordered 2 Invoiced 2 Shipped 2 Refunded 0	1 / 2 available
<input type="checkbox"/> Radiant Tee-M-Orange	Ordered 2 Invoiced 2 Shipped 0 Refunded 0	0 / 2 available

At the **Select order to create RMA** page specify the order for RMA, select the order item(s) and specify the item quantity.

Once done, click **Next** button to proceed to the next step.

**Please select Resolution \***

- Refund
- Replacement

**Please select Package Condition \***

- Opened
- Not opened
- Damaged

Define the RMA **Resolution** – Refund or Replacement – and select **Package Condition**. These are the Custom Fields that come with the RMA extension by default.

Custom Fields can be added or edited any time later

My Wish List

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Compare Products

You have no items to compare.

My Orders

Rival Field Messenger

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

**Please fill in details**

Item #1 [remove](#)

Reason Wrong size v

**Message \***

Hi, guys! Seems I have gotten a Tee of a wrong size!

[Add file](#) [Submit Request](#)

Specify the **Reason** for the RMA request and, if necessary, leave a message to the store representatives.

Once done, click [Submit Request](#) button to confirm the RMA request.

All the RMA information along with the chat thread will appear in **My Returns** tab.

## Managing RMA requests

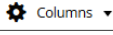
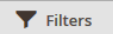
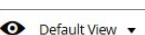
RMA extension introduces its section to the **Sales** page of your Magento 2 store.

### Manage RMA

This is the main section for managing all RMA requests.

Request ID	Order	Product(s) + Reason	Customer	Last Reply by	Resolution	Status	Store	Created At
000000001	000000002	Hero Hoodie (Wrong size) Hero Hoodie-L-Green (Wrong color)	John Doe doe@example.com	Admin	Refund	Closed	Default Store View	2015-12-15 07:22:21
000000004	000000008	Rival Field Messenger (Item broken)	Jane Roe roe@example.com	Customer	Replacement	Pending Approval	Default Store View	2015-12-15 12:42:27

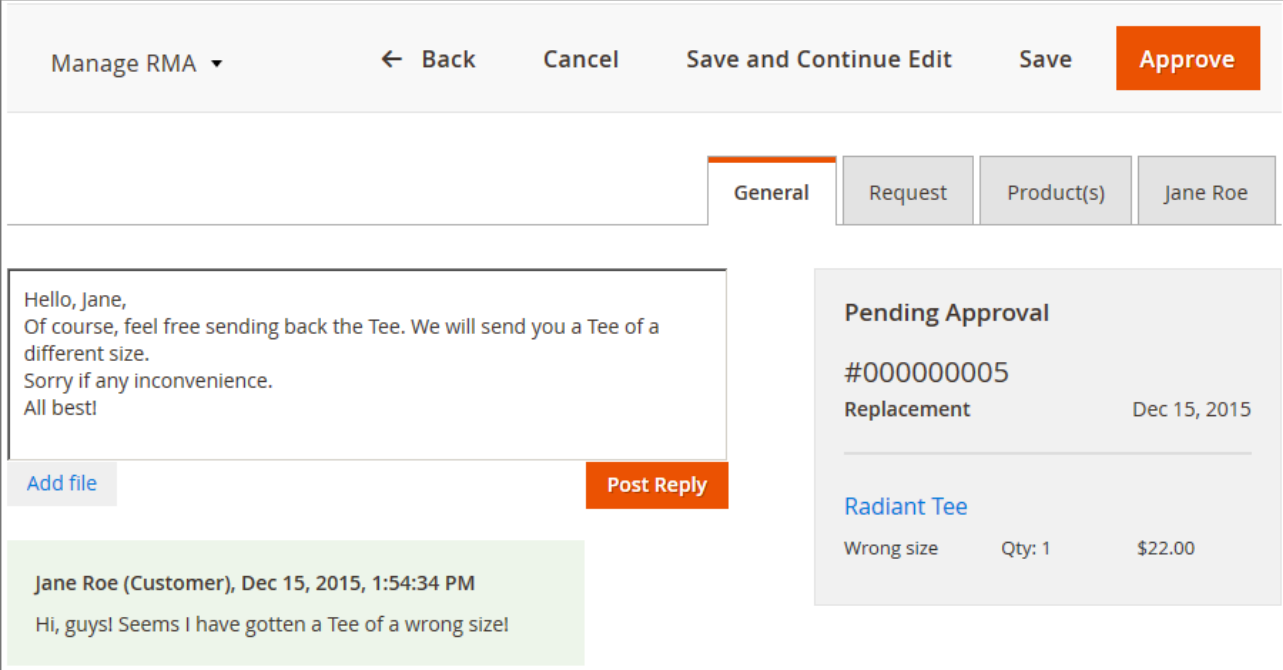
The RMA grid can be adjusted according to a particular task:

-  button allows enabling/disabling the grid columns that may be considered relevant or excessive for the current task;
-  button allows sorting RMA requests according to the relevant attributes (date, resolution, status, etc.);
-  button allows saving the current grid look for quick access.

Once RMA grid configured store administrator may start managing RMA requests.

### Replying to an RMA request

Click RMA **Request ID** to proceed to the **Manage Request** page.



Manage RMA ▾   ← Back   Cancel   Save and Continue Edit   Save   **Approve**

General   Request   Product(s)   Jane Roe

Hello, Jane,  
Of course, feel free sending back the Tee. We will send you a Tee of a different size.  
Sorry if any inconvenience.  
All best!

[Add file](#)   **Post Reply**

**Jane Roe (Customer), Dec 15, 2015, 1:54:34 PM**  
Hi, guys! Seems I have gotten a Tee of a wrong size!

**Pending Approval**  
#000000005  
Replacement   Dec 15, 2015

**Radiant Tee**  
Wrong size   Qty: 1   \$22.00

**Manage Request** page offers the following options: :

- Approve/cancel customer request with the help of dedicated buttons;
- Reply to the customer's message, update customer on the request status or provide any other necessary information ;
- Edit the request Custom Fields.

### Approving request

In order to leave a message as per screenshot and approve the request click  button.

The email notification on a new reply and an RMA status update will be send to the customer.

The customer will be able to print the shipping label (that needs to be included in the RMA package) and confirm that the package has been sent back to the store.

Below is the example of the shipping label:

<b>RMA #000000001</b>		
Date: 12/15/15		
<b>Return address</b>	<b>Details</b>	
John Doe Sample St Sample City, Alabama, 12345 United States 123456789	Order ID: #000000002 Resolution: Refund Package Condition: Opened	
<b>Items RMA requested for</b>		
<b>Product Name</b>	<b>SKU</b>	<b>Qty</b>
Hero Hoodie	MH07-L-Green	1
Hero Hoodie-L-Green	MH07-L-Green	1

### Confirming Package receiving

It will be required to confirm that the customer's package has been received.

Manage RMA ▾

← Back   Save and Continue Edit   Save   **Confirm Packadge Receiving**

Click **Confirm Packadge Receiving** button to confirm that the package has been received.

### Closing a request

Now, depending on the customer's request type, the RMA request can be either closed by clicking **Close**

**Note:**

The extension does not handle refunding and shipping options. These are to be processed manually by any suitable means.

button or refunded by clicking **Issue Refund** button.

## Adjusting RMA options and settings

### Statuses and Email Templates

As it has been previously mentioned, extension comes set up and ready for work right after installation. However, RMA request statuses and notification emails can be adjusted to fit the store workflow.

Statuses and Email Templates ▾				
ID ↓	Name	Email to Customer	Email to Admin	Message to Request Thread
1	Pending Approval	Yes	Yes	Yes
2	Approved	Yes	No	Yes
3	Package Sent	No	Yes	Yes

### Statuses

There are seven RMA request statuses, each defining particular stage of the RMA process.

Status	Events
<b>Pending Approval</b>	Assigned to the new return request automatically
<b>Approved</b>	Assigned upon store administrator approving an RMA request
<b>Package Sent</b>	Assigned upon customer confirming package sending
<b>Package Received</b>	Assigned upon store administrator confirming package receiving
<b>Issue Refund</b>	Assigned upon store administrator issuing a refund
<b>Closed</b>	Assigned upon closing a request either by customer or store administrator
<b>Canceled</b>	Assigned upon store administrator cancelling the request

### Email templates

Different email notifications can be sent to customer, store administrator or both depending on the request type. The request thread message displayed upon RMA obtaining particular status can also be edited.

### Custom Fields

The extension comes with the following pre-defined Custom Fields: Resolution, Package Condition and Reason; that can be edited in **Custom Fields** tab.



Custom Fields ▾ Add Custom Field

3 records found 20 ▾ per page < 1 of 1 >

ID	Name	Field Type	Refers To	Websites
1	Resolution	Dropdown	Request	Main Website
2	Package Condition	Dropdown	Request	Main Website
3	Reason	Dropdown	Item	Main Website

Store administrator can also create additional Custom Fields depending on the products or services offered.

To create a Custom Field click Add Custom Field button:

- Define name (for internal identification purposes) of the Custom Field and the field type: Text Field, Text Area, Dropdown, Multiselect;
- Decide if the Custom Field should refer to the whole RMA request (e.g. Resolution) or specific order item (e.g. Reason);
- Set the RMA status allowing store administrator and customer edit/view the Custom Field;
- Make the Custom Field required if necessary (customers will not be able to submit a request if the Custom Field is not filled in);
- Add the Custom Field to the Shipping Label (for identifying the parcel);
- Chose a website for the Custom Field to be displayed on;
- Adjust the Custom Field frontend label (name of the Custom Field seen by customers);
- Add options for customers to select from.

Once done with the Custom Attribute click Save button. The Custom Field will be created and appear on the RMA request page.

## Extension settings

### General

General RMA settings are available in **Stores > Configuration > aheadWorks > RMA** backend section.

General		
Return Period	<input type="text" value="60"/>	[STORE VIEW]
	<small>Allow to request RMA after order completion, days</small>	
Allow guests to request RMA	<input type="text" value="Yes"/>	[STORE VIEW]
"Confirm Shipping" alert text	<div style="border: 1px solid #ccc; padding: 5px;"><small>Having clicked "Yes", you won't be able to cancel RMA or make any changes. Please ensure that: 1. You have included the RMA Label inside the package 2. You have sent the package to the RMA department</small></div>	[STORE VIEW]

- **Return Period** – defines how many days after placing an order customer can ask for an RMA;
- **Allow guests to request RMA** – defines if guest customers can ask for an RMA (email and order ID are required);
- **"Confirm Shipping" alert text** – allows editing "Confirm Shipping" pop-up notification.

### RMA text blocks and Policy

This settings section allows displaying CMS blocks at specific RMA request steps.

Any existing CMS block can be assigned to the corresponding step.

### Contacts

The section defines the RMA department credentials: name displayed, RMA Department email, RMA Department address.

### Email notifications

The section defines templates for the email notifications:

- new reply by the store administrator to the customer's RMA request (**Reply by Admin**);
- new reply by the customer to the RMA request (**Reply by Customer**).

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For an in-depth look, visit RMA demo store at the extension's [product page](#).

Feel free to contact our support team with any questions.

[Submit a helpdesk ticket](#).

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