

RMA

for Magento 2



Table of contents

Introducing RMA for Magento 2.....	4
Getting Around.....	4
Extension Logic.....	4
Getting Around.....	5
Backend Configuration.....	8
Manage RMA.....	8
Creating RMA Requests from the Backend.....	9
Managing RMA Requests.....	10
Approving a Request.....	11
Printing Label.....	11
Creating a Replacement Order.....	12
Issuing a Refund.....	12
Closing a Request.....	12
Tracking returns at customer page in the backend.....	12
Statuses and Email Templates.....	12
Statuses.....	13
Templates.....	13
Custom Fields.....	14
Actions Tied to Custom Fields.....	14
Canned Responses.....	15
Creating a New Canned Response.....	16
Order Page Improvements.....	16
Returns Section.....	16
Extension Settings.....	17
General.....	17
RMA Text Blocks and Policy.....	17
Product selection page block position:.....	18

Reasons and details page block position:.....	18
Policy block position:.....	18
Contacts.....	19
Email Notifications.....	19
File Attachments.....	19
Troubleshooting.....	20

Introducing RMA for Magento 2

Magento 2 RMA completely arranges the return merchandise process in web stores. Customers can create return requests and monitor them from their accounts. Store admins can arrange requests from the backend by adding custom fields to an RMA request form, communicating with customers in the dedicated chat area, and sending email alerts and custom canned responses while requests are processed.

Compatibility: Magento Open Source 2.2.X - 2.3.X, Magento Commerce 2.2.X - 2.3.X

Getting Around

The **Magento 2 RMA** extension handles all the key aspects of return merchandise management:

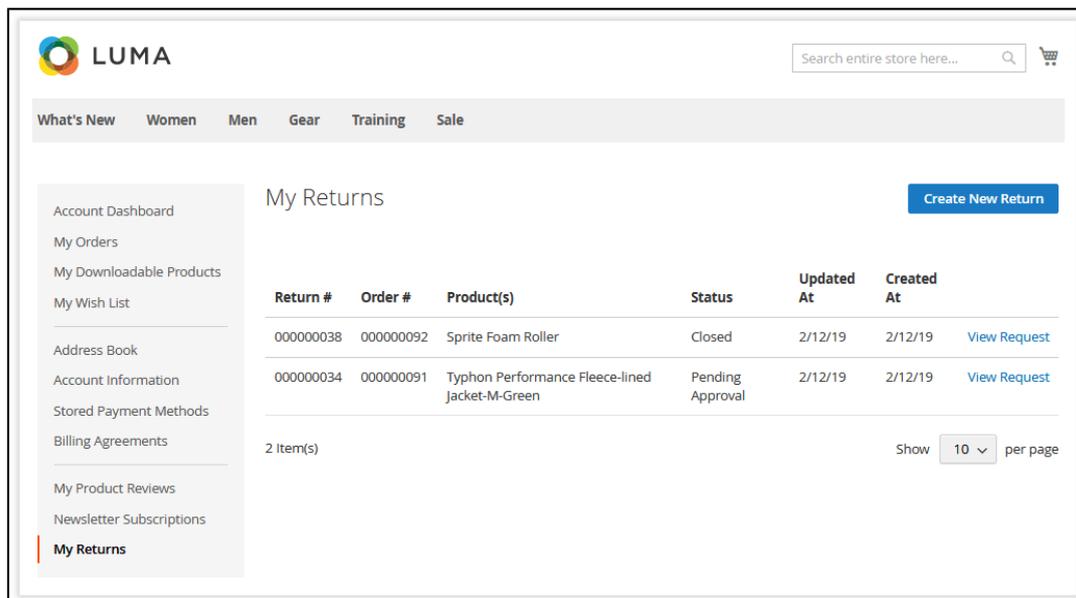
- RMA request creation & monitoring in both the frontend and backend;
- Custom RMA fields for the RMA request form;
- Per-item control (for multi-product returns);
- Message thread with file attachments and admin notes;
- Email alerts configured individually per RMA status;
- Configurable canned responses.

Extension Logic

In the backend, the module generally consists of 4 grids and the configuration page. Store admins can create/monitor return requests, configure email alerts along with canned responses, exchange messages with customers in the dedicated thread (and optionally leave internal notes not visible to requesters and attach files to the thread), and add custom fields to the request form. On the storefront, customers can monitor their requests from the separate section, create new requests as well as use the same message thread functionality as in the admin area.

Getting Around

The Magento 2 RMA extension comes ready for work right after installation. Once installed, it introduces the **'My Returns'** section to a customer account page and the **'Create New Return'** link to the store footer. By following both of the links, you can create a new RMA request.



Along with the **'My Returns'** section and the **'Create New Return'** link, customers can request a return from the order view page in the **'My Orders'** account section. To do this, they should click on the **'Request Return'** active link on the order details page.

Thanks to the RMA extension, you can allow your guest customers to ask for the return. To create a return request, a guest customer should click on the **'Create New Return'** active link in the store main page's footer.

Here the module adds the **'Guest Order'** section where the guest should specify their email address used to place the order and the order number.

The screenshot shows the 'Guest Order' form. It includes a title 'Guest Order' and a message: 'If you have placed order as guest user, please enter Order Number and Email which has been used for the order.' There are two input fields: 'Order Number: *' with the value '000000006' and 'Email: *' with the value 'guest@example.com'. A blue 'Next' button is located at the bottom left of the form.

Now, let's request the return from the 'My Returns' section. To do this, click

[Create New Return](#)

On the 'Select order to create RMA' screen, choose the order that you want to return.

<input checked="" type="radio"/>	Order #000000032	Nov 1, 2017	Complete	\$75.40	Next
			Ordered 1 Invoiced 1 Shipped 0 Refunded 0	1 available	
Radiant Tee-M-Orange					
			Ordered 1 Invoiced 1 Shipped 0 Refunded 0	1 available	
Apollo Running Short-33-Black					

Next, select the item(s) you want to return and specify the item quantity (if you need to return several items). Choose the **Resolution** for the return and **Package Condition**. Those are the custom fields that come with the RMA extension by default.

Products to Return:

[Select All](#) | [Deselect All](#)

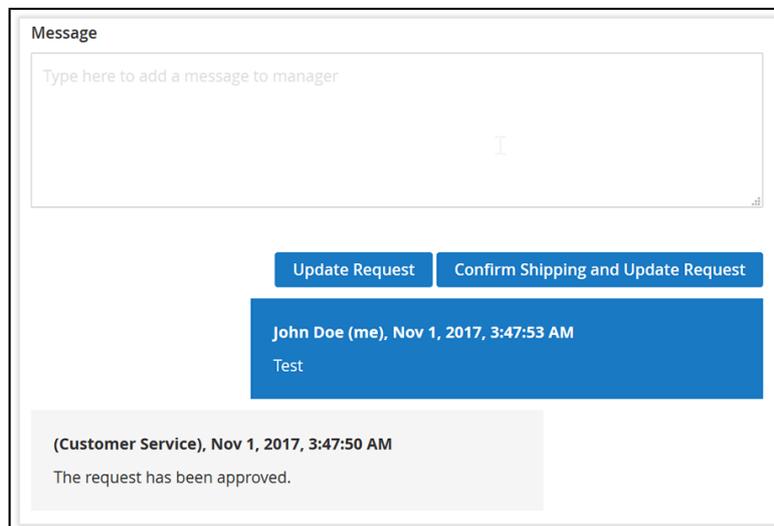
<input checked="" type="checkbox"/>		Radiant Tee-M-Orange \$22.00	Reason * Wrong size	Multiselect filed (for product) * Multiselect filed with first v Multiselect filed with se Multiselect filed with third v
<input type="checkbox"/>		Apollo Running Short-33-Black \$32.50		

Tick checkbox to select.

You can add other custom fields or edit the existing ones in the corresponding backend section.

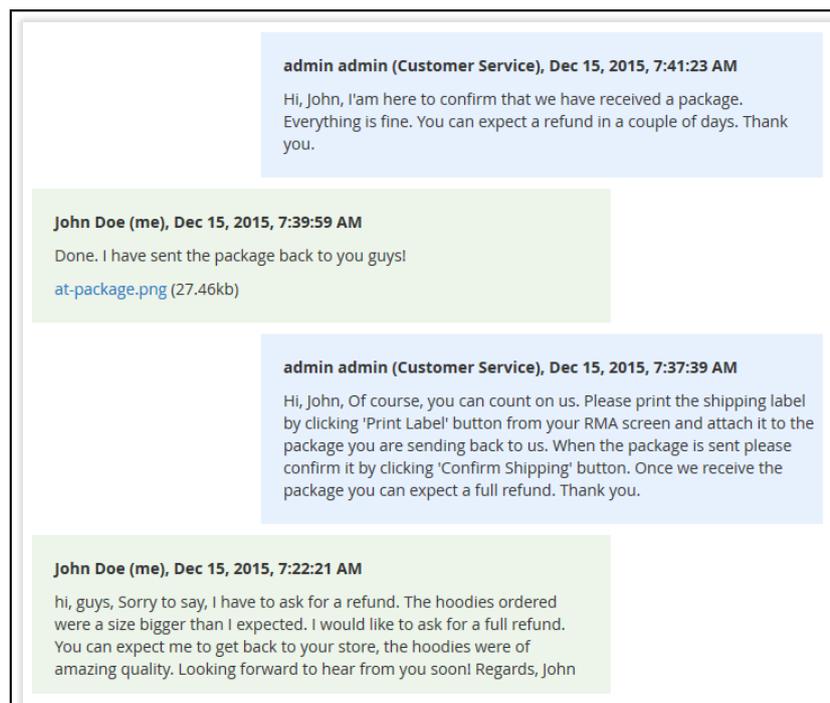
Once done, click **Next** to proceed to the next step.

When the items are selected and custom fields are filled in, you can add a message to your request. The message will be emailed to an admin.



The screenshot shows a 'Message' input area with a text box containing the placeholder 'Type here to add a message to manager'. Below the text box are two buttons: 'Update Request' and 'Confirm Shipping and Update Request'. Below the buttons is a message history section. A blue message bubble from 'John Doe (me), Nov 1, 2017, 3:47:53 AM' contains the text 'Test'. Below it is a grey message bubble from '(Customer Service), Nov 1, 2017, 3:47:50 AM' containing the text 'The request has been approved.'

Both customer and admin messages are combined in a thread that can be found under the corresponding RMA request.



The screenshot shows a message thread with three messages. The first message is from 'admin admin (Customer Service), Dec 15, 2015, 7:41:23 AM' with the text 'Hi, John, I'am here to confirm that we have received a package. Everything is fine. You can expect a refund in a couple of days. Thank you.' The second message is from 'John Doe (me), Dec 15, 2015, 7:39:59 AM' with the text 'Done. I have sent the package back to you guys!' and an attachment 'at-package.png (27.46kb)'. The third message is from 'admin admin (Customer Service), Dec 15, 2015, 7:37:39 AM' with the text 'Hi, John, Of course, you can count on us. Please print the shipping label by clicking 'Print Label' button from your RMA screen and attach it to the package you are sending back to us. When the package is sent please confirm it by clicking 'Confirm Shipping' button. Once we receive the package you can expect a full refund. Thank you.' The fourth message is from 'John Doe (me), Dec 15, 2015, 7:22:21 AM' with the text 'hi, guys, Sorry to say, I have to ask for a refund. The hoodies ordered were a size bigger than I expected. I would like to ask for a full refund. You can expect me to get back to your store, the hoodies were of amazing quality. Looking forward to hear from you soon! Regards, John'.

Once done, click **Submit Request**. The request is submitted.

All the request-related information along with the message thread can be found in the 'My Returns' section.

Currently, products from **canceled RMA** requests are not available for a new RMA request.

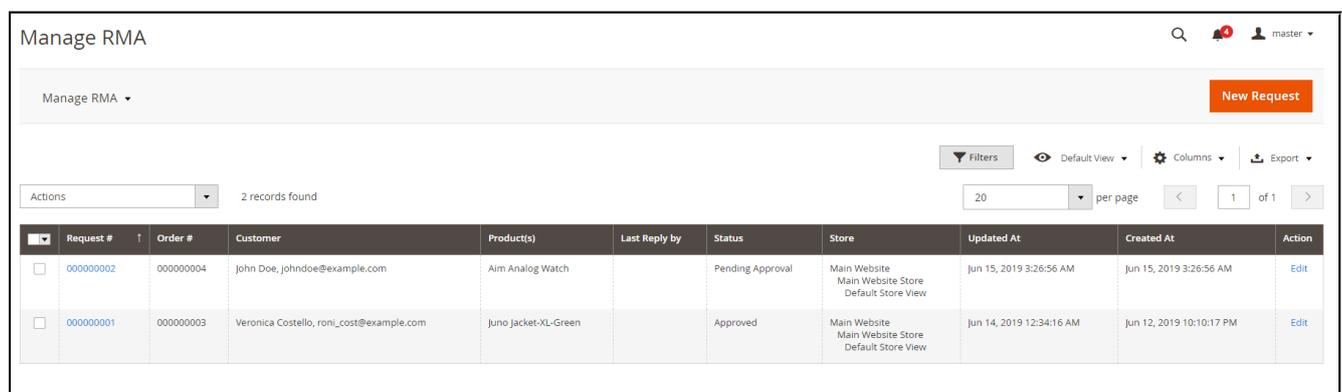
Backend Configuration

For seamless experience with the present RMA module and Magento 2.3 Enterprise Edition / Cloud Edition , make sure the **native Magento 2 RMA is disabled**. Refer to the following steps to do so:

1. Navigate to **Stores > Configuration > Sales> Sales**;
2. Set **Enable RMA on Storefront** and **Enable RMA on Product Level** to 'No'.

Manage RMA

Manage RMA is the main section of the extension.



The screenshot shows the 'Manage RMA' interface. At the top, there is a search bar, a notification bell, and a user profile icon labeled 'master'. Below this is a 'Manage RMA' dropdown menu and a 'New Request' button. The main area contains a table with 2 records found. The table has columns for Request #, Order #, Customer, Product(s), Last Reply by, Status, Store, Updated At, Created At, and Action. The first record is for a 'Pending Approval' request for an 'Aim Analog Watch'. The second record is for an 'Approved' request for a 'Juno Jacket-XL-Green'.

Request #	Order #	Customer	Product(s)	Last Reply by	Status	Store	Updated At	Created At	Action
000000002	000000004	John Doe, johndoe@example.com	Aim Analog Watch		Pending Approval	Main Website Main Website Store Default Store View	Jun 15, 2019 3:26:56 AM	Jun 15, 2019 3:26:56 AM	Edit
000000001	000000003	Veronica Costello, roni_cost@example.com	Juno Jacket-XL-Green		Approved	Main Website Main Website Store Default Store View	Jun 14, 2019 12:34:16 AM	Jun 12, 2019 10:10:17 PM	Edit

Here you can manage all the RMA requests submitted by you and your customers. With the '**Actions**' box above the grid, you can change the request status individually or massively to:

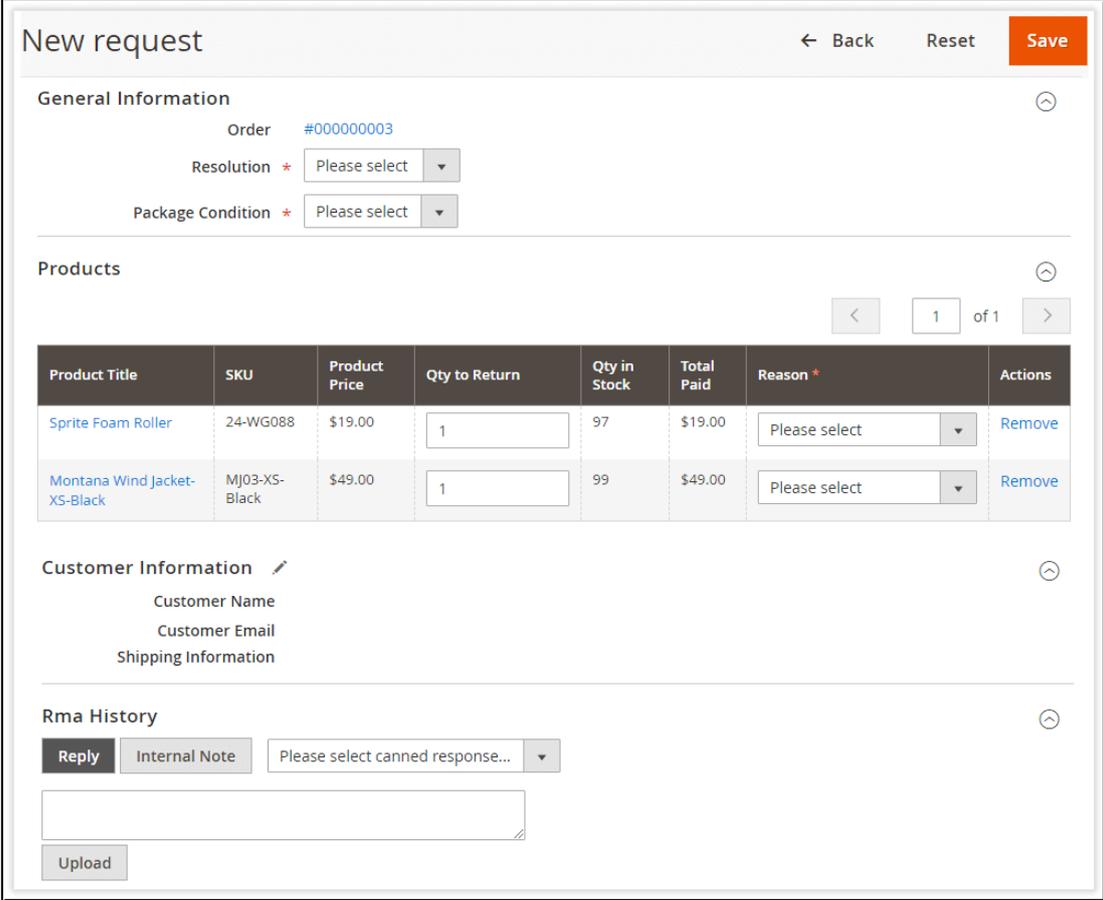
- Approved;
- Canceled;
- Closed;
- Issue refund;
- Package received;
- Package sent;
- Pending approval.

Here, you can also export selected request or the whole list in CSV/Excel.

Currently, products from **canceled RMA** requests are not available for a new RMA request.

Creating RMA Requests from the Backend

To create a new return request, click  above the grid.



Product Title	SKU	Product Price	Qty to Return	Qty in Stock	Total Paid	Reason *	Actions
Sprite Foam Roller	24-WG088	\$19.00	1	97	\$19.00	Please select	Remove
Montana Wind Jacket- XS-Black	MJ03-XS-Black	\$49.00	1	99	\$49.00	Please select	Remove

The 'New Request' page consists of several sections:

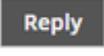
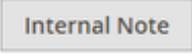
- **General Information.** With these options, you can select the order the request relates to. Next, you should select the **Resolution** you want to apply and **Package condition** reported by a customer if you use the above custom fields for your request forms.

Note: You can create RMA requests for completed orders only.

- **Products.** Products included in the order. From the '**Products**' grid, you can amend the number of returned items and the reason to send them back individually for each item. You can also remove certain products from the grid if you don't want them to be included in the request.
- **Customer Information.** The information about the customer is automatically taken from the order.

- **RMA History.** Here you can exchange messages with the customer and attach files if necessary.

Messaging is possible in several ways.

1. You can write an individual notification for the customer by specifying the message in the text area and clicking  above the area;
2. You can leave an internal note for other admins. For this purpose, click . The whole text area below will turn yellow to make you sure that the message is for internal use only;
3. Finally, you can select a canned response to be sent to the customer in response to their particular actions.

Canned responses are customizable values. Configure them from the '**Canned Responses**' page.

In addition to messages, you can also attach files to the newly created request.

In Magento 2.3.0 installed on PHP 7.2, the files can't be uploaded to the RMA request form in the admin area. The problem relates to the bug in the 2.3.0 version. To fix it, apply the following patch: <https://github.com/magento/magento2/pull/19249>

This problem will be fixed in Magento 2.3.1.

As soon as the new RMA request is created, you can manage it the same way as the requests created by customers.

Managing RMA Requests

Click the Request's id (all id's are presented as active links in the '**Request #**' column) to proceed to the '**Manage Request**' page. The page looks almost the same way as the '**New Request**' page. The only difference is that the '**Status**' and '**Last Update date**' parameters are presented there.

On this page, you can close, cancel, and approve the requests pending an approval.

With the version 1.4.0, we've added ability to arrange a **non-linear workflow**. Now you can change request statuses according to your business needs and increase effectiveness of your specific RMA model.

Approving a Request

Approve the request by clicking  .

Now the email notifying the customer about the new reply and request status update will be sent.

Customers will now have the option to print shipping labels (to be included in the RMA package) and confirm that the package has been sent back to your store.

RMA #000000001

Date: 12/15/15

Return address	Details
John Doe Sample St Sample City, Alabama, 12345 United States 123456789	Order ID: #000000002 Resolution: Refund Package Condition: Opened

Items RMA requested for

Product Name	SKU	Qty
Hero Hoodie	MH07-L-Green	1
Hero Hoodie-L-Green	MH07-L-Green	1

Printing Label

Label printing is now available from the backend so that you can use the the label for working with warehouses.

Manage Request #000000001

Manage RMA ▾ ← Back Reset Print Label Create a Replacement Order Create a Credit Memo Save and Continue Edit **Set to Package Sent ▾**

General Information

Status: Approved

Last Update: June 14, 2019 00:34

Order: #000000003

Resolution * Replacement ▾

Package Condition * Opened ▾

Confirming Package Receiving

After the request has been approved, and the customer has confirmed that the package had been sent back to your store, you will need to confirm the receipt. Do this by

clicking  .

Creating a Replacement Order

As soon as the 'Package Received' status is applied, you can create a replacement order for the requests requiring a replacement.

Issuing a Refund

For the requests requiring a refund, you can create a credit memo right from the 'Manage Request' page.

Closing a Request

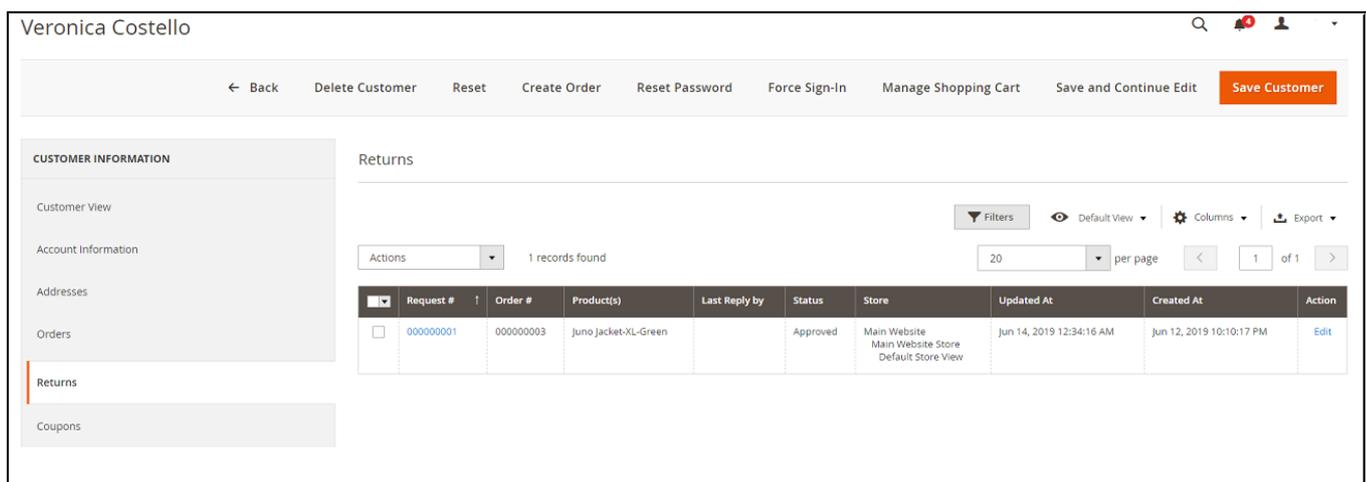
Finally, you can close the request as soon as the item is replaced or refunded.

That's it. The RMA request is successfully resolved. Let's proceed to the RMA extension's settings.

The Magento 2 RMA extension doesn't offer any refunding or postal services. Refunds are processed manually by any means necessary.

Tracking returns at customer page in the backend

The extension adds a corresponding tab to a customer page in the backend where you can refer to when it's needed to follow the RMA requests of a particular user.



The screenshot shows the Magento 2 backend interface for a customer named Veronica Costello. The 'Returns' tab is active, displaying a table with one record. The table columns are: Request #, Order #, Product(s), Last Reply by, Status, Store, Updated At, Created At, and Action. The record shows a request for 'Juno Jacket-XL-Green' with a status of 'Approved'.

Request #	Order #	Product(s)	Last Reply by	Status	Store	Updated At	Created At	Action
000000001	000000003	Juno Jacket-XL-Green		Approved	Main Website Main Website Store Default Store View	Jun 14, 2019 12:34:16 AM	Jun 12, 2019 10:10:17 PM	Edit

Statuses and Email Templates

As it was previously mentioned, the RMA extension comes set up and ready for work right after the installation. If required, you can always adjust RMA request statuses and edit the notification emails.

ID	Name	Enabled	Sort Order	Email to Customer	Email to Admin	Message to Request Thread
1	Approved	Yes	20	Yes	No	Yes
2	Canceled	Yes	70	Yes	Yes	Yes
3	Closed	Yes	60	Yes	No	Yes
4	Issue Refund	Yes	50	No	Yes	No
5	Package Received	Yes	40	Yes	No	Yes
6	Package Sent	Yes	30	No	Yes	Yes
7	Pending Approval	Yes	10	Yes	Yes	Yes

Statuses

There are 7 predefined RMA request statuses, each defining a particular stage of the RMA process.

Status	Event
Approved	Assigned upon the request's approval
Canceled	Assigned upon the request's cancellation
Closed	Assigned upon closing a request either by you or customer
Issue Refund	Assigned upon issuing a refund
Package Received	Assigned upon package receipt confirmation
Package Sent	Assigned by the customer confirming package sending
Pending Approval	Assigned to the new return request automatically

If you need you can create a new unique status by clicking 'Add New Rule' at the Statuses and Email Templates page.

After the Magento 2 RMA 1.4.0 release, you are able to assign priority to statuses in your store. You can sort statuses according to their priority and see the sequence of your RMA stages.

Templates

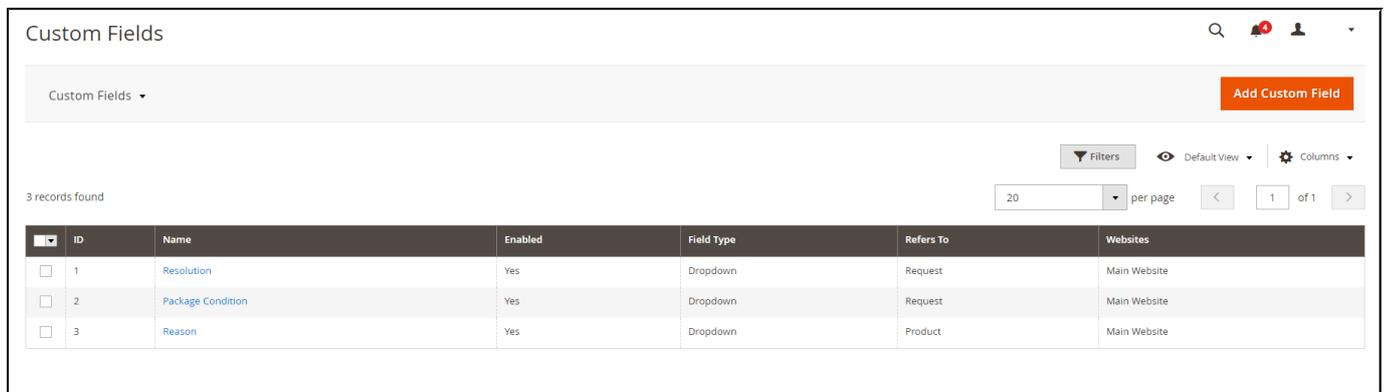
Depending on the request's type, it is also possible to send an email notification to the customer, store administrator, or both.

Along with defining templates for email notifications, you can edit the request thread's message to be displayed upon the request obtaining a particular status.

Custom Fields

As we already described in the RMA - Magento 2#Getting Around section, when submitting the request, you are suggested to fill in the '**Resolution**', '**Package Condition**', and '**Reason**' sections to ask for the return.

All those are the predefined custom fields that come with the RMA extension by default. They can be edited in the '**Custom Fields**' section.



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

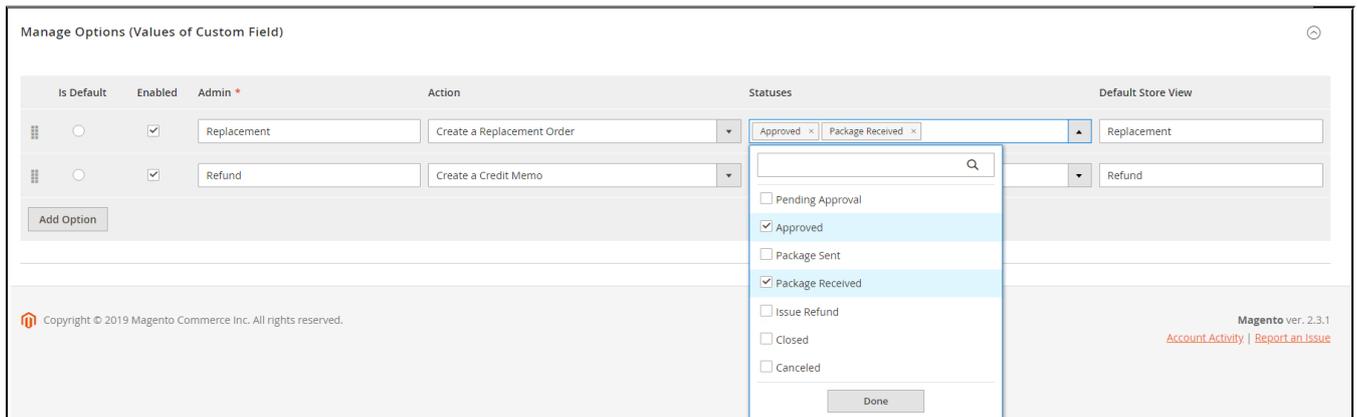
Along with editing custom fields, you can also create the additional ones depending on the products or services you are offering.

To create a new custom field, click [Add Custom Field](#) :

- Define the name (for internal identification purposes) of the custom field and the field type: text field, text area, dropdown, multi-select;
- Decide if the custom field should refer to the RMA request on the whole or to the item(s) previously ordered;
- Set the return status upon which you and your customers can edit/view the field;
- If necessary, make the field required (customers will not be able to submit the request without filling this field);
- Add the custom field to the shipping label (this might help to identify the parcel);
- Choose the website the custom field should be displayed at.
- Adjust the field's frontend label (the title that will be displayed to customers).
- Add options (attribute values available for the 'Dropdown' and 'Multiselect' field types) if you want the customer to select from the predefined set of attributes.

Actions Tied to Custom Fields

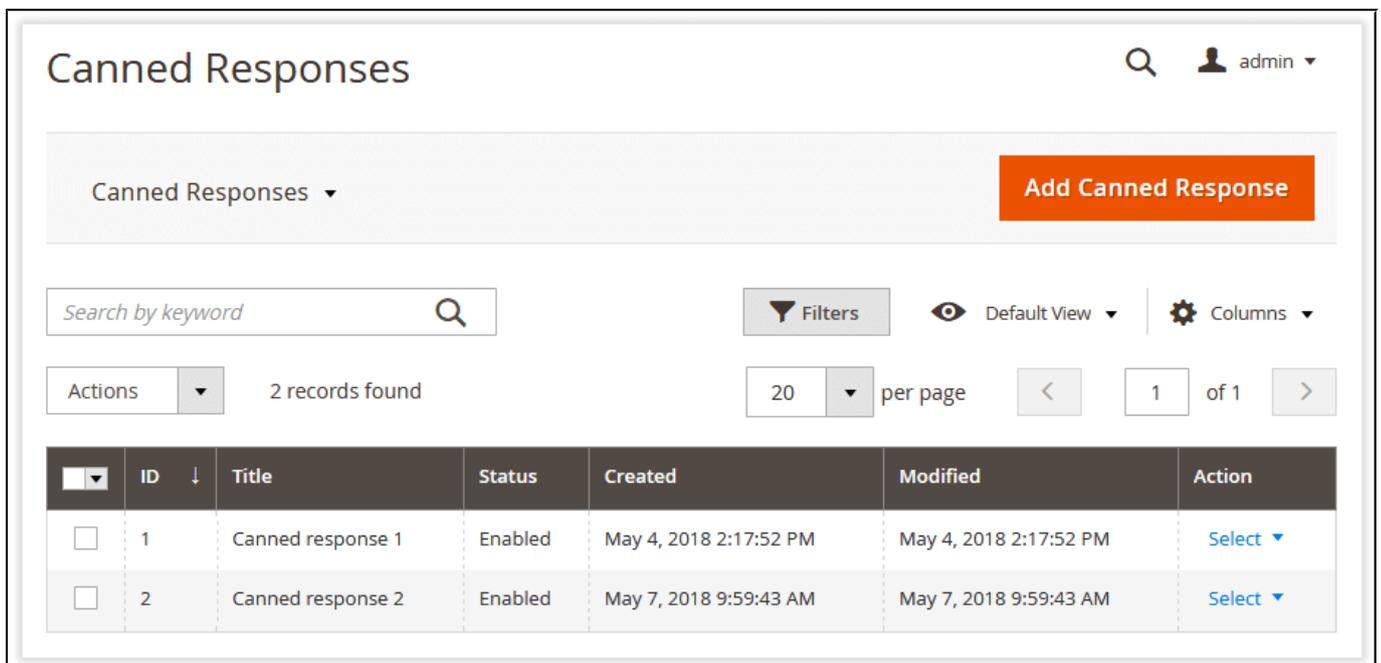
If a field type falls under the 'Dropdown' and 'Multiselect' options you are able to tie specific actions to the field and specify a status for action trigger. Thus, you can automate the part of the workflow and save time.



Once done with the new field, click [Save](#) .

The custom field is created. It can be found in the previously set area of the RMA request page.

Canned Responses



From the '**Canned Responses**' grid, you can create fast responses that can be used for status updates and other simple messages sent to customers. You can manage the existing responses either individually or massively and create new canned responses.

With the '**Select**' box in the '**Action**' column, you can edit or delete the selected responses, while the '**Actions**' box above the grid makes it possible to change the status or delete the selected response(s).

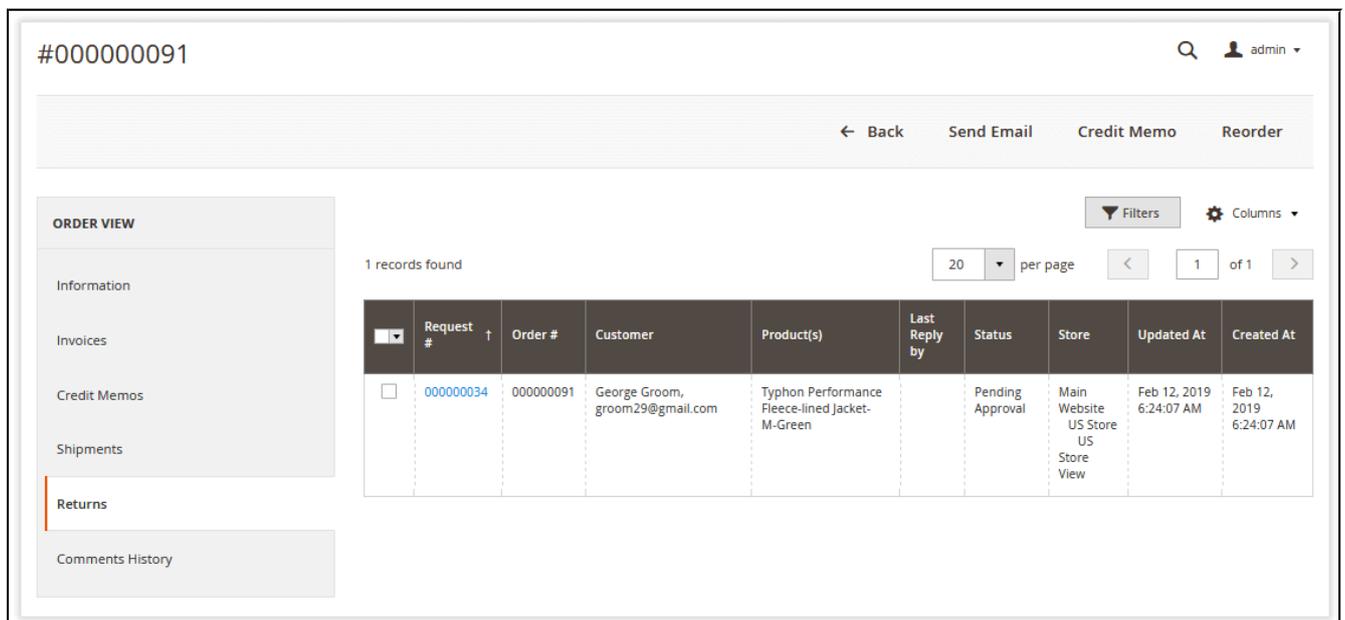
Creating a New Canned Response

To add a new canned response, click [Add Canned Response](#) above the grid. On the following page, you can enable the response, provide its title, select the appropriate store view and specify its content.

Note: Only enabled canned responses can be used for answers.

Order Page Improvements

Returns Section



The screenshot displays the 'Returns' section of an order page for order #000000091. The page includes a navigation bar with 'Back', 'Send Email', 'Credit Memo', and 'Reorder' buttons. A sidebar on the left lists 'ORDER VIEW' options: Information, Invoices, Credit Memos, Shipments, Returns (highlighted), and Comments History. The main content area shows a grid with 1 record found. The grid has columns for Request #, Order #, Customer, Product(s), Last Reply by, Status, Store, Updated At, and Created At. A single record is shown with a checkbox in the Request # column.

<input type="checkbox"/>	Request #	Order #	Customer	Product(s)	Last Reply by	Status	Store	Updated At	Created At
<input type="checkbox"/>	000000034	000000091	George Groom, groom29@gmail.com	Typhon Performance Fleece-lined Jacket- M-Green		Pending Approval	Main Website US Store US Store View	Feb 12, 2019 6:24:07 AM	Feb 12, 2019 6:24:07 AM

If you want to see all return requests created for a particular order, you can do this right from the order view page. The **Returns** section enumerates all the created requests in the dedicated grid. In order to manage a certain request, you need to click the active link with the ID of the request in the **Request #** column.

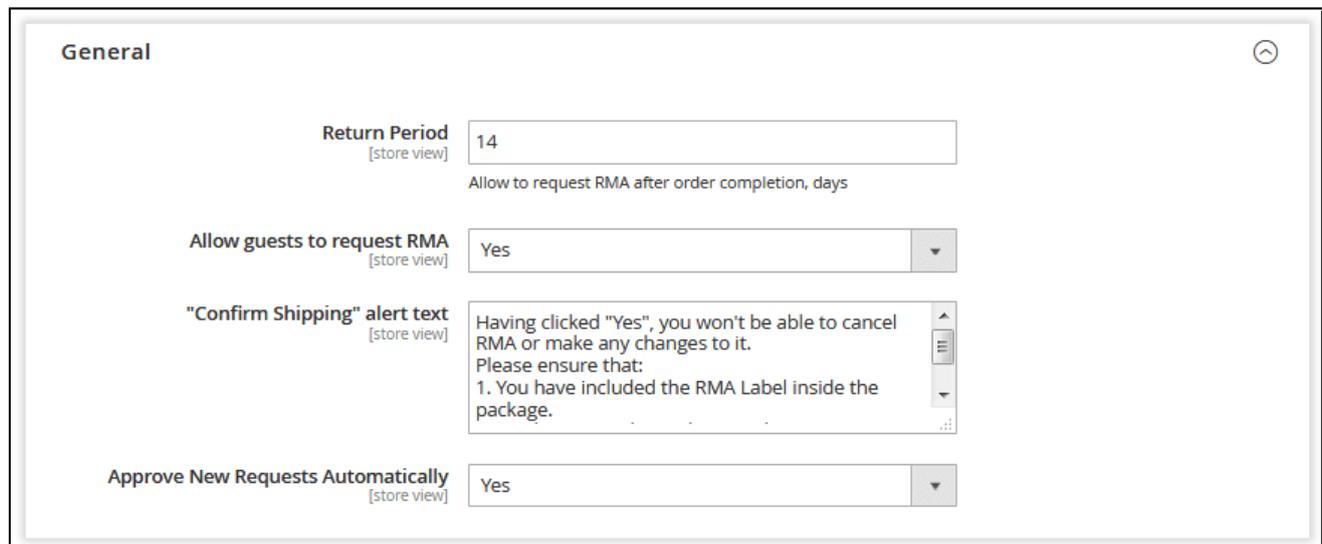
With [New Return](#) above the grid, you can create return requests on the spot.

Extension Settings

General

In the 'General' setting section, you can adjust the basic extension parameters:

- **Return Period** - defines how many days after placing the order the customer can ask for the return;
- **Allow guests to request RMA** - defines if guest customers can ask for the refund (email and order ID are required);
- **"Confirm Shipping" alert text** - edits the 'Confirm Shipping' pop-up notification;
- **Approve New Requests Automatically** - defines if the incoming return requests should be approved automatically.



The screenshot shows the 'General' settings section for the RMA extension. It contains four configuration items:

- Return Period** [store view]: A text input field containing the value '14'. Below it, the text reads 'Allow to request RMA after order completion, days'.
- Allow guests to request RMA** [store view]: A dropdown menu with 'Yes' selected.
- "Confirm Shipping" alert text** [store view]: A text area containing the text: 'Having clicked "Yes", you won't be able to cancel RMA or make any changes to it. Please ensure that: 1. You have included the RMA Label inside the package.'
- Approve New Requests Automatically** [store view]: A dropdown menu with 'Yes' selected.

RMA Text Blocks and Policy

This setting section displays CMS blocks at the specific RMA request steps.

Every field represents the corresponding step with the box of all CMS blocks available in the store.

Product selection page block position:

New Return

Product selection block

aheadWorks®

Select order to create RMA

Order	Order Date
<input type="radio"/> Order #000000008	Dec 15, 2015
<input type="radio"/> Order #000000007	Dec 15, 2015

Reasons and details page block position:

New Return for Order #000000006

Reasons and details block

aheadWorks®

[Back](#)

Please select Resolution *

- Refund
- Replacement

Please select Package Condition *

- Opened
- Not opened
- Damaged

Policy block position:

This is not actually a block position, rather, this is a link available for the customer when accepting the Return Policy regulations.

[I accept Return Policy regulations](#)

RMA text blocks and Policy ⌵

Guest RMA page block [store view] Home Page Block ⌵

Product selection page block [store view] Footer Links Block ⌵

Reasons and details page block [store view] Don't display ⌵

Policy Block [store view] Home Page Block ⌵

Contacts ⌵

RMA Department display name [store view] Active Customer Service

RMA Department email [store view] rma@active.com

RMA Department address [store view] 1388 Davis Street, Jefferson, GA.

Email Notifications ⌵

Reply by Admin [store view] Active Admin Reply Template (Default) ⌵

Reply by Customer [store view] Active Customer Reply Template (Default) ⌵

File Attachments ⌵

Allow Customer to Attach Files [store view] Yes ⌵

Max Upload File Size (Mb) [store view] 2

Allow File Extensions [store view] zip,rar,jpg,jpeg,png,gif,pdf,doc,docx,xls,xlsx

Contacts

This setting section defines your RMA department credentials such as the name displayed, email, and address.

Email Notifications

This setting section defines email notification templates about the new reply by the store administrator to the customer's request (Reply by Admin) and the new reply by the customer to the request (Reply by Customer).

File Attachments

This setting section makes it possible for customers to attach files to their return requests. Here you can also specify the maximum size of the uploaded files in megabytes and available file extensions.

Troubleshooting

In Magento 2.3.0 installed on PHP 7.2, the files can't be uploaded to the RMA request form in the admin area. The problem relates to the bug in the 2.3.0 version. To fix it, apply the following patch: <https://github.com/magento/magento2/pull/19249>

This problem will be fixed in Magento 2.3.1

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 at:

helpdesk@aheadwork.com

Call us:

US: +1 (646) 480 - 0154

UK: +44 (20) 8133 - 0154