

rma_product_return_magento2

version

BoostMyShop

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Contents

RMA Product Return for Magento2	1
1. Overview	1
2. Installation	1
First Installation	1
Upgrade	1
Disable extension	1
3. Customer Side	1
Return view	1
New request	2
4. Admin Side	2
Create a new RMA	2
Manage RMA	2
Return form	3
Messages	3
Process RMA	3

RMA Product Return for Magento2

1. Overview

RMA Product Return extension for Magento 2 is designed to manage customer returns.

Main features :

- Customer can request returns from customer account selecting an order, filling comments, reasons, request
- Automatic email notification for both admin and customer when RMA status changes
- Integrated messages system to communicate with the client
- Customer can print return form including RMA details and return address
- Process RMA to refund customer and restock products

2. Installation

First Installation

To install a boostmyshop magento2 extension on your platform, process the following steps :

- Download zip archive from your boostmyshop customer account
- Upload files on your server : once uploaded, module must be in directory `app/code/BoostMyShop/`
- Connect on your server via ssh and run the following commands :

```
rm -rf var/*
rm -rf pub/*
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
```

Once everything is done, go back in Magento, select menu system > web setup wizard, then click on the component manager button : you should see the new extension here

Upgrade

The upgrade process is exactly the same as the installation process

Disable extension

To disable an extension, select menu system > web setup wizard, then click on the component manager button Find the extension you want to disable and select "disable" in the "Actions" column

3. Customer Side

You can enable the RMA features in customer account using :

- Stores > Configuration > BoostMyShop > Rma > Front > Enable

To allow customers to request a new RMA, enable also option "Enable request"

Once it's done, customer can see a new "My Returns" tab

From this tab, he can consult returns history and get details.

Return view

4. Admin Side

- Customer can send you a message using the textbox at the bottom : When a new message is sent, admin is automatically notified by email.
- Customer can print the return form (only if the RMA status is "accepted")

New request

From the returns tab, customer can ask a new return using the "Request for a return" button.

The next step is to select the order to return : you can control what orders are visible here configuring the allowed statuses in stores > configuration > boostmyshop > rma > front > Allowed order statuses

Once the order is selected, customer can select quantity to return for each products, but also the reason, request and additional comments : you can configure the available reasons & requests in stores > configuration > boostmyshop > rma > General.

Once the request is submitted, it creates a new RMA with status "Requested", and an email notification is sent to admin (the admin email address is configurable in stores > configuration > boostmyshop > rma > admin notification)

4. Admin Side

The RMA screens are available in several places :

- Menu Sales > Manage returns
- From the order view, tab "RMA"
- From the customer view, tab "RMA"

Create a new RMA

To create a new Return, 2 options :

- Go in sales > Manage returns, click on button "Create RMA for order" and in the next screen, select the order to return
- Go in the order to return, select the "RMA" tab and click on button "Create order"

Manage RMA

Once you are in a RMA, you can manage RMA using the statuses :

- Draft : you are creating the RMA, it is not visible for customer
- Requested : customer sent a return request, it is pending admin approval
- Accepted : you accepted the return, customer must print the return form (from its customer account or using the link into the email sent)
- Processing : you received the products, you are going to process them
- Complete : you have processed the RMA (you processed refunds)

Note : if you enabled option stores > configuration > boostmyshop > rma > customer notification > Automatic customer notification on RMA status change, the customer will receive an email each time the RMA status changes.

In the "Items" tab, you get the list of products associated to the RMA, you can edit the quantity to return, reason, request and comments.

The "History" tab lists every events related to the RMA, an entry is added when :

- RMA status changes
- Customer or admin is notified
- A product is refunded OR returned in stock

Return form

You (and the customer) can print the download the return form : customer must print this document and put it with the products he returns.

You can control several areas in this pdf : * Logo : is is the one configured in stores > configuration > sales > sales > invoice and packing slip design > Logo for PDF print out * The return to address : configurable in stores > configuration > boostmyshop > rma > general > return address * Instructions : this is a free text displayed after the product list in the PDF. You can configure it in stores > configuration > boostmyshop > rma > general > instructions

Messages

You can exchange messages with the client using the "Messages" tab : from here you can send a new message : then a notification email is sent to customer and your message is added to the thread.

Customer can reply from its customer account.

Process RMA

This is the final step for a RMA. TO process a RMA, go within the RMA and click on the "Process" button.

Then a new screen is displayed where you can select the actions to performed :

- For each product, you can decide the quantity to put back to stock, and the quantity to refund. Note : you can not refund a product if it has NOT been invoiced.
- You can decide to refund shipping using the "Yes / No" drop down menu
- Last, you can change the amount refunded using the adjustment textboxes : "Refund fee" and "Refund adjustment"

Every time you change a refund option, the Total refunded is updated at the bottom.

Once everything is done, you can click on button "Complete RMA" to perform the selected actions. Then the RMA status goes to "Complete" and the customer receives and email