RMA for Magento 2.0

USER GUIDE
Version 1.0

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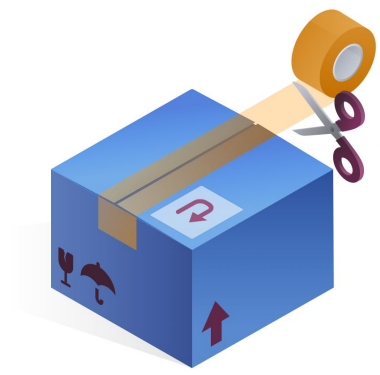
http://exto.io/rma-for-magento-2.html



Keep your staff informed with RMA's power Admin interface.

Internal communications channel keeps staff, and customers, up-to-date.

Streamline workflow with specific steps to process product returns.

Easily communicate with customers using up-to-date, customized email templates.

Allow customers to return products as an existing customer or guest.

Organize and control incoming RMA requests.

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1. Introduction

The RMA extension adds functionality to create and process product return requests. The process is usually as follows:

1. The customer creates a new return request, selects one or more product for return, and completes the required form fields.
2. The administrator (the merchant) reviews the request and then cancels or confirms it.
3. When the request is confirmed, the customer prints a packing slip, puts it in the product box and sends the product pack to the merchant.
4. After the administrator receives the package, the request can be approved for refund / exchange or denied, or a custom resolution may be specified.

2. Installation

1. Back up your web directory and store database. You can make backup copies with any tool you find appropriate. If you are going to use the native Magento backup function, then navigate to:

   Systems > Tools > Backups

   and make **System** and **Database** backups.

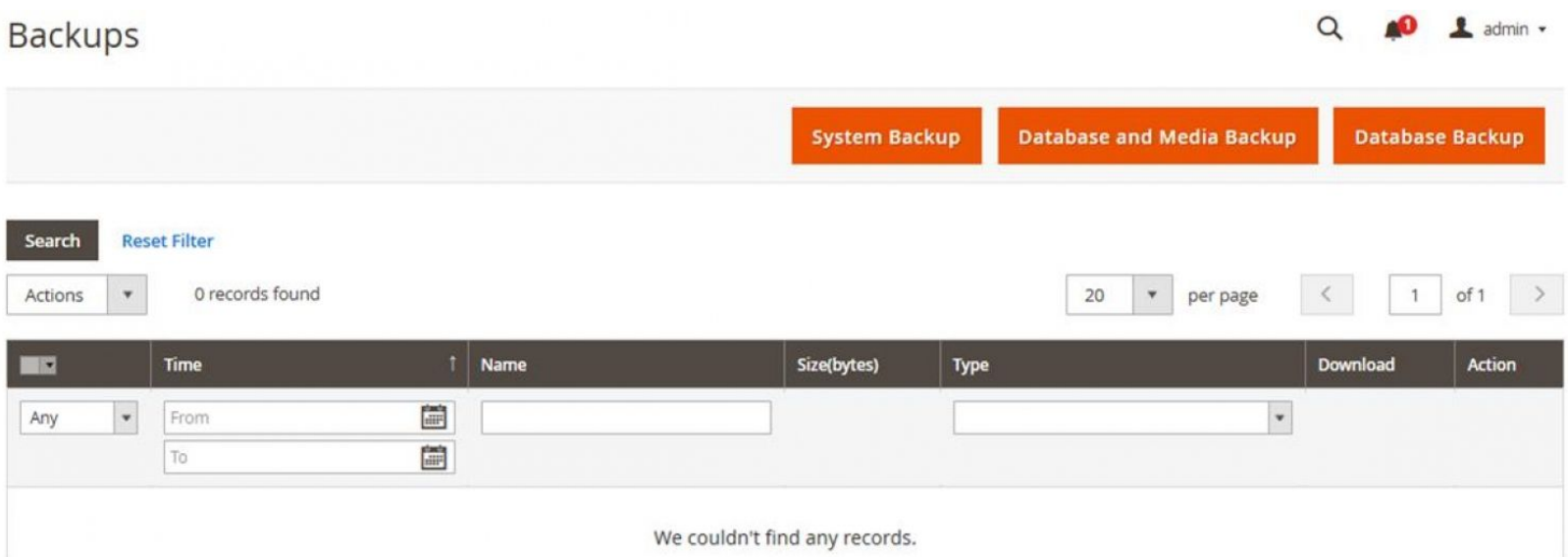

Image 1. Create backups

2. Download the Exto RMA installation package.
3. Upload the contents of the Exto RMA installation package to your store root directory.
4. In the SSH console of your server navigate to your store root folder:

   ```
   cd path_to_the_store_root_folder
   ```

   Then run:

```
php -f bin/magento module:enable Exto_RMA
```

Next run:

```
php -f bin/magento setup:upgrade
```

Finally run:

```
php -f bin/magento cache:clean
php -f bin/magento cache:flush
```

Flush the store cache, log out from the backend and then log in again.

3. The Backend

3.1. Settings

Sales > Exto RMA > Settings

You can set up various RMA variables in the RMA **Configuration** section, including the number of days within which items need to be returned, and define customer interface settings and the format of email templates.

General section

You can specify basic settings in this section, e.g. whether guests may request returns and the number of days within which items need to be returned.

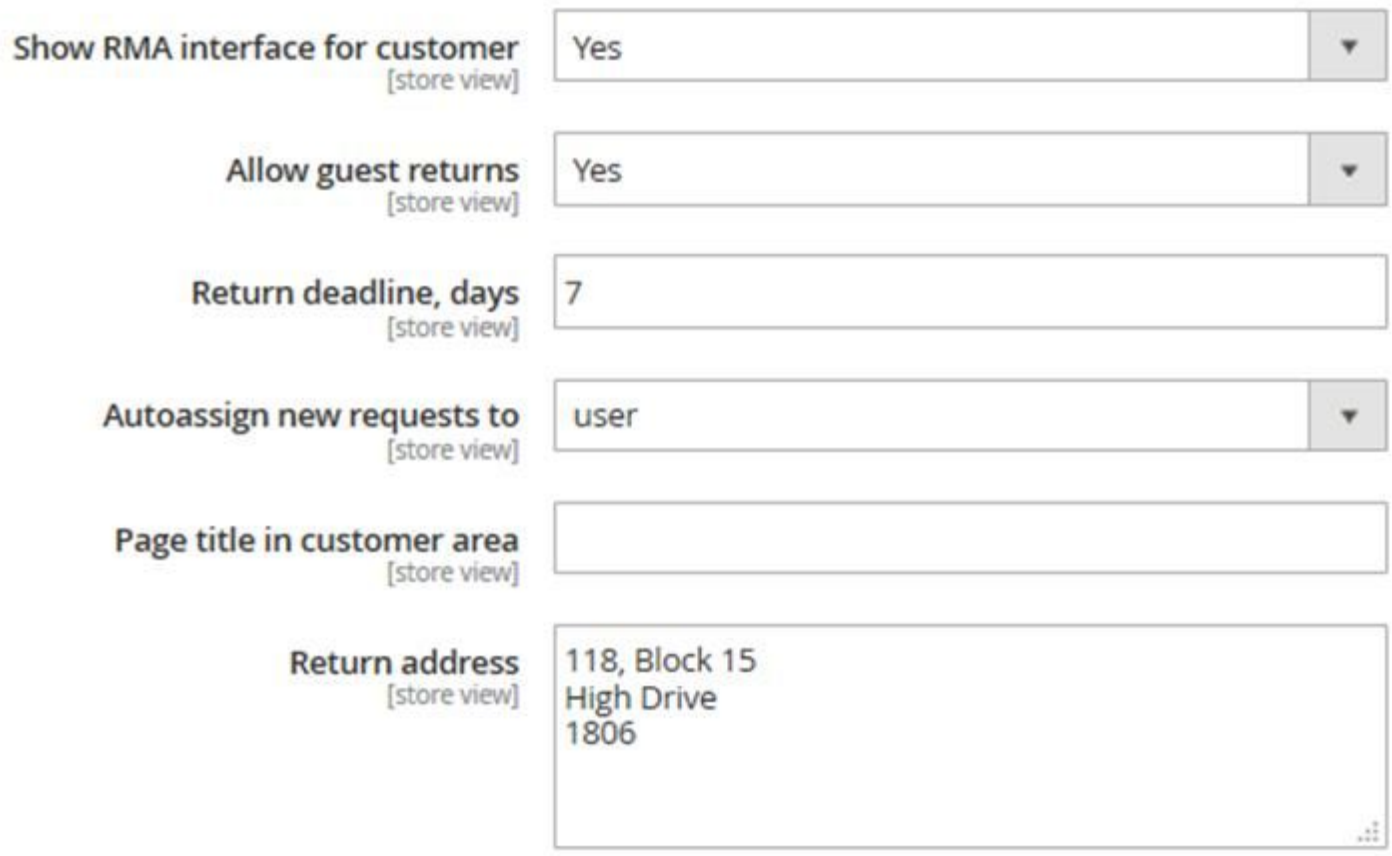

Image 2. Configure general settings

Label	Description
Show RMA interface for customer	turns on/off the RMA section in the customer account area
Allow guest returns	defines whether customers who are not logged in (guests) can make a request
Return deadline, in days	specifies how many days are allowed to request a return
Auto-assign new requests to	indicates who is the owner of a new request. All admin users will be listed and the selected user will be assigned to the new request and receive all email notifications about the request.
Page title in customer area	is the title of the RMA page in the customer interface
Return address	is used in the customer interfaces to specify the address to which the item(s) should be returned

Return policy section

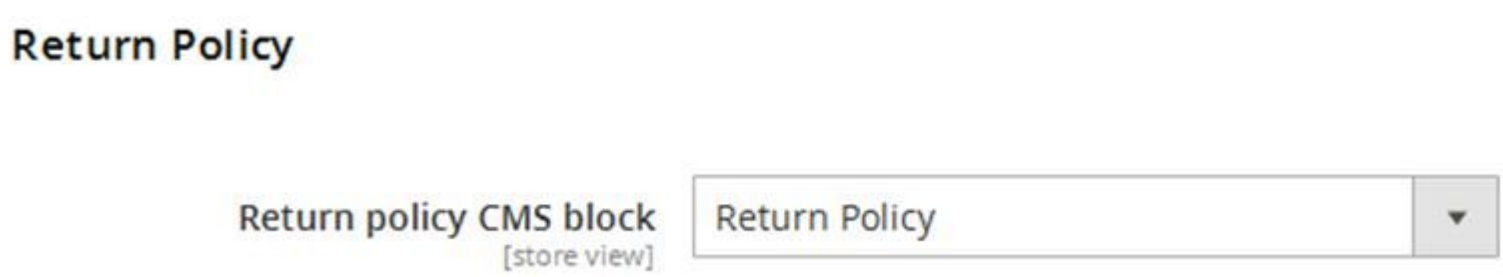

Image 3. Configure return policy text

- **Return policy CMS block -** return policy information which will be displayed in the customer interface.

Email templates section

You can create your own email templates by modifying system default templates, and then configure which ones you want to use here. Custom templates can be developed at **Marketing > Email Templates**.

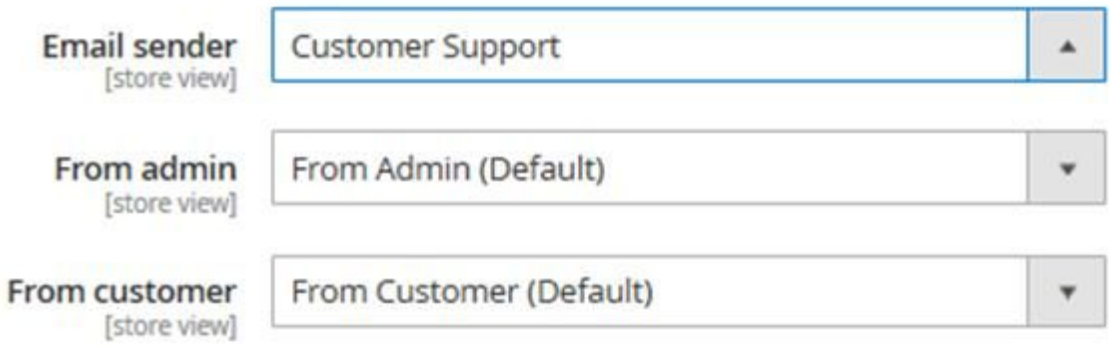

Image 4. Configure which email templates to use

- **Email sender -** the sender of the emails.
- **From admin** - email template for delivering messages from admin to customer.
- **From customer** - email template for delivering messages from customer to admin.
- **Status changed** - email to customer which informs about status update.

> NOTICE
> To create a new template, please read the **Create email template** chapter.

3.2. Configuration

In the **Exto RMA** section, you can configure statuses, custom fields and drop-down options.

Workflow and statuses

Sales > Exto RMA > Workflow and Statuses

A workflow is a sequence of steps or tasks through which a process passes from start to finish. For instance, when a customer initiates a return request, administrators can define the sequence of tasks required to be completed before the customer's request is approved or denied. The workflow help to streamline the RMA process by adding/removing necessary statuses and making sure they follow in the right order.

On the **Workflow and Statuses** page, click **Add New Status** to define a new status and specify how it is handled.

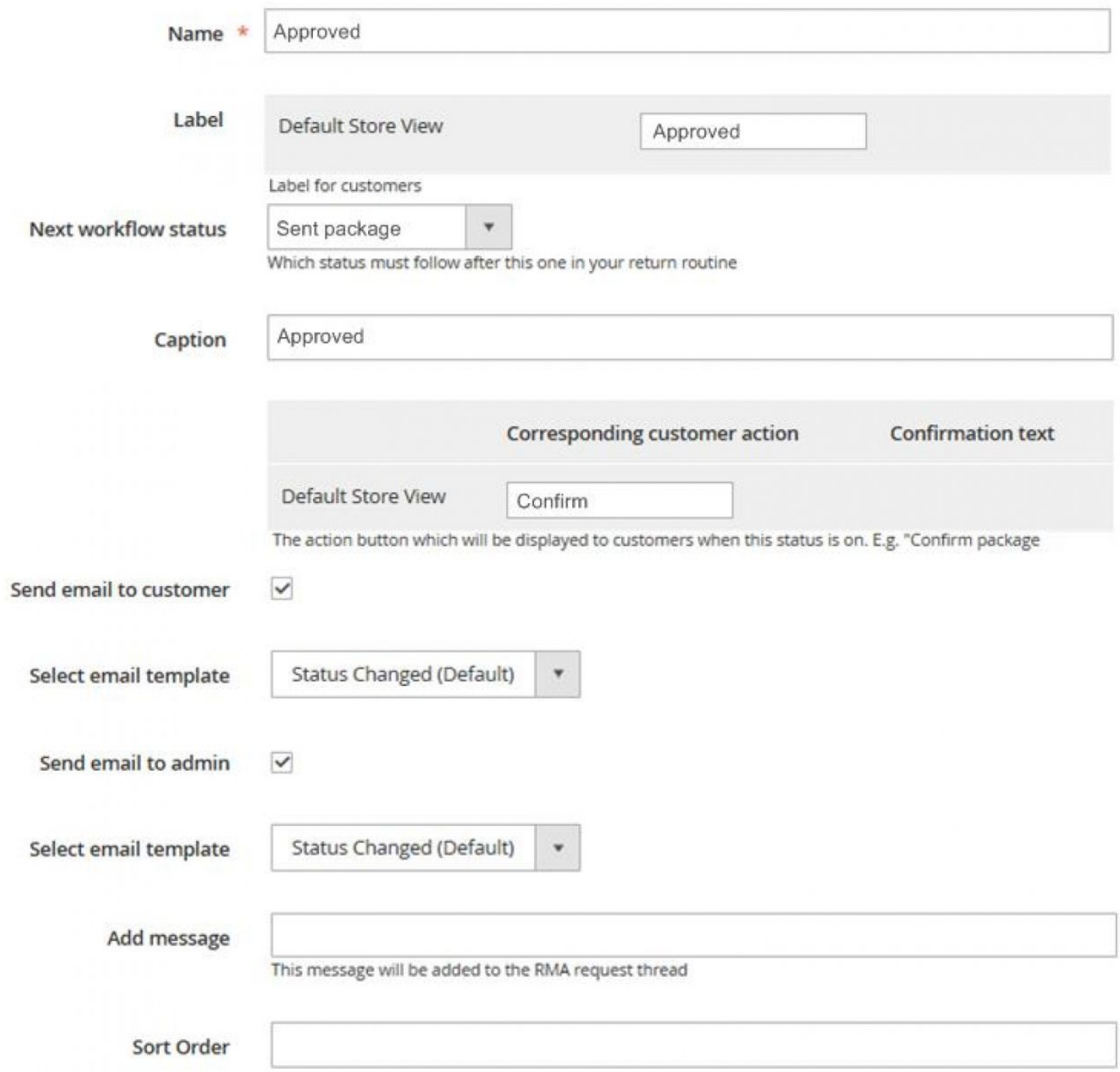

Image 5. Add a workflow status

NOTICE

To see how custom fields are used in the backend, please read Additional information.

Label	Description
Next workflow status	the next status in the workflow after this one. The next status is activated by an action by either admin or the customer, depending on the setup.
Caption	button text which will be displayed for admin. Clicking on this button activates the next configured status.
Corresponding customer action	an action button will appear in the customer area to prompt the user to act if the status is active
Confirmation text	confirmation dialog text displayed if customer is required to confirm action

A list of the default workflows and statuses is shown below.

Status	Button caption	Next workflow step (Status)	Customer action
Pending approval	Approve	Approved	
Approved			Send package
Package sent	Confirm receiving package	Package received	
Package received	Refund/Exchange	Refund/Exchange	
Closed			
Canceled			

Custom fields

Sales > Exto RMA > Custom Fields

Administrators can create custom fields like tracking number, shipping carrier, return conditions etc. A custom field becomes visible in the customer interface only when the **Visible for customer** field has been checked in the admin interface.

On the **Manage Custom Fields** page, click **Add New Custom Field**.

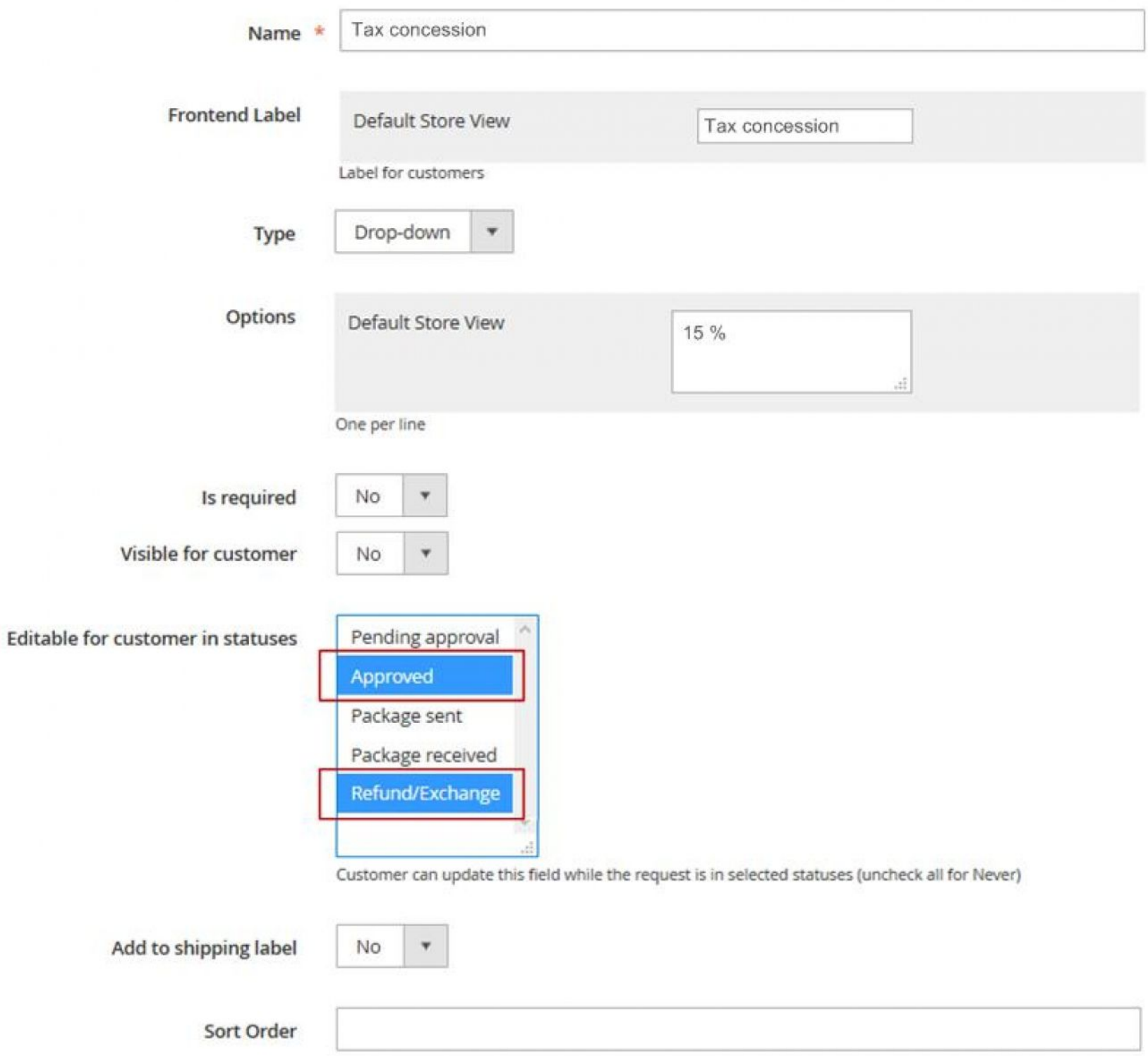

Image 6. Add a custom field

Custom fields created here can be viewed on the RMA Requests page.

Label	Description
Frontend label	this is the label of the field for a particular store view. A useful feature is that labels can be in different languages for different store views.
Type	type of field. Available field types are: Dropdown / Text/ Text area / Checkbox / Date
Options	used to add dropdown options
Is required	specifies whether the field must be completed / selected
Visible for customer	determines whether customer can view the field in a particular store view

Editable for customer in statuses	if one or more statuses are selected, specifies which ones a request must have to allow a customer to edit the field
Add to shipping label	specifies whether value of custom field must be printed on shipping label
Sort order	allows administrators to set the order in which fields are displayed on the screen

Manage options

Sales > Exto RMA > Manage Options

Default reasons for requests, resolutions, package conditions and quick responses can be managed - added, edited or deleted - from the **Manage Options** page. These options are used as descriptors and do not affect workflows.

Click on an option to add a new one, or edit or delete an existing one.

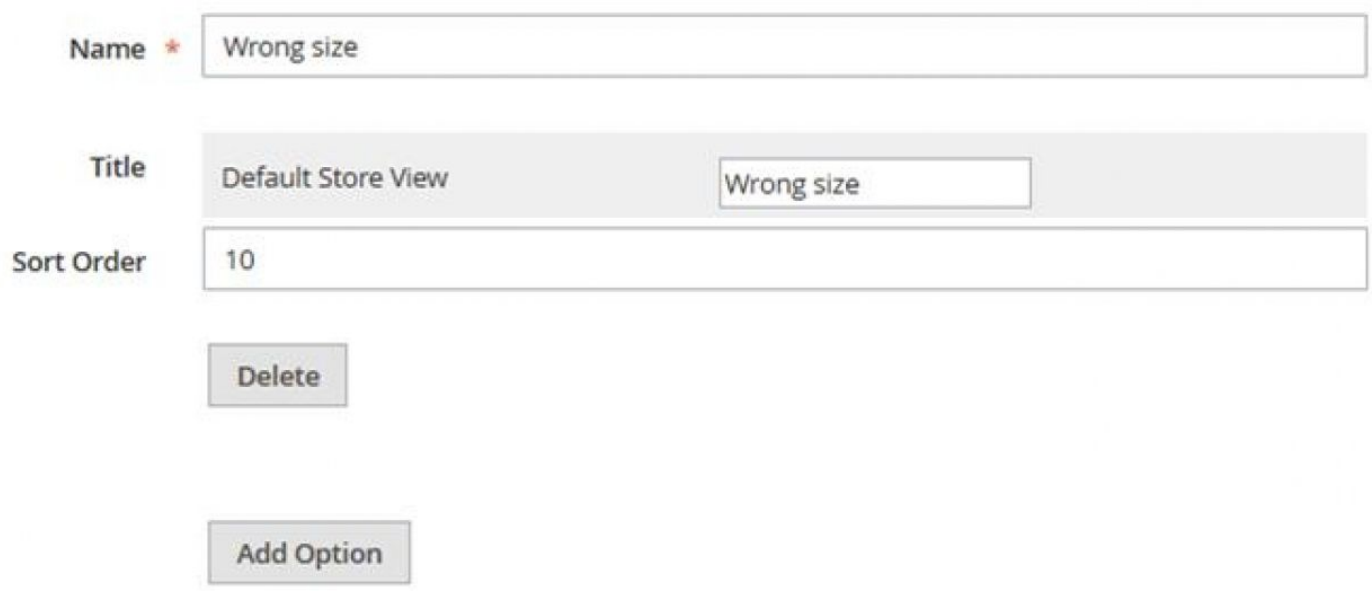

Image 7. Add an RMA reason

3.3. Create email templates

Marketing > Email Templates

You can create your own email template by loading one of the default Exto RMA ones and editing it. You can save it with a unique name and use it for your specific requirements. Exto RMA provides a number of variables to automate the populating of your content, e.g. customer contact details, store details, request status and ID, and base URL. These Magento system variables are placeholders which are replaced by particular values when the actual email is generated.

1. On the **Email Templates** page, click **Create New Template**.
2. Under the **Exto_RMA** section, select a default template from the **Template** dropdown list and click **Load**.
3. Enter a **Template Name** and **Template Subject**. The subject may contain system variables.
4. Create custom content for the template body or edit the default content.

5. To insert variables, click the place where you want to insert the variable in the text. Click **Insert Variable**. A pop-up containing a list of variables opens. The variables in the **Store Contact Information** are available in all email templates whereas the variables in the **Template Variables** section are specific to the template you're editing. Click the name of the required variable which will be inserted in the email body.
6. In **Template Styles**, you can add CSS styles for the template.
7. Click **Preview Template** to check the email before saving it.

You can save multiple variations of the default templates to cover various contingencies. For instance, you can have one template for status changes, one for messages from admins and one for messages from customers.

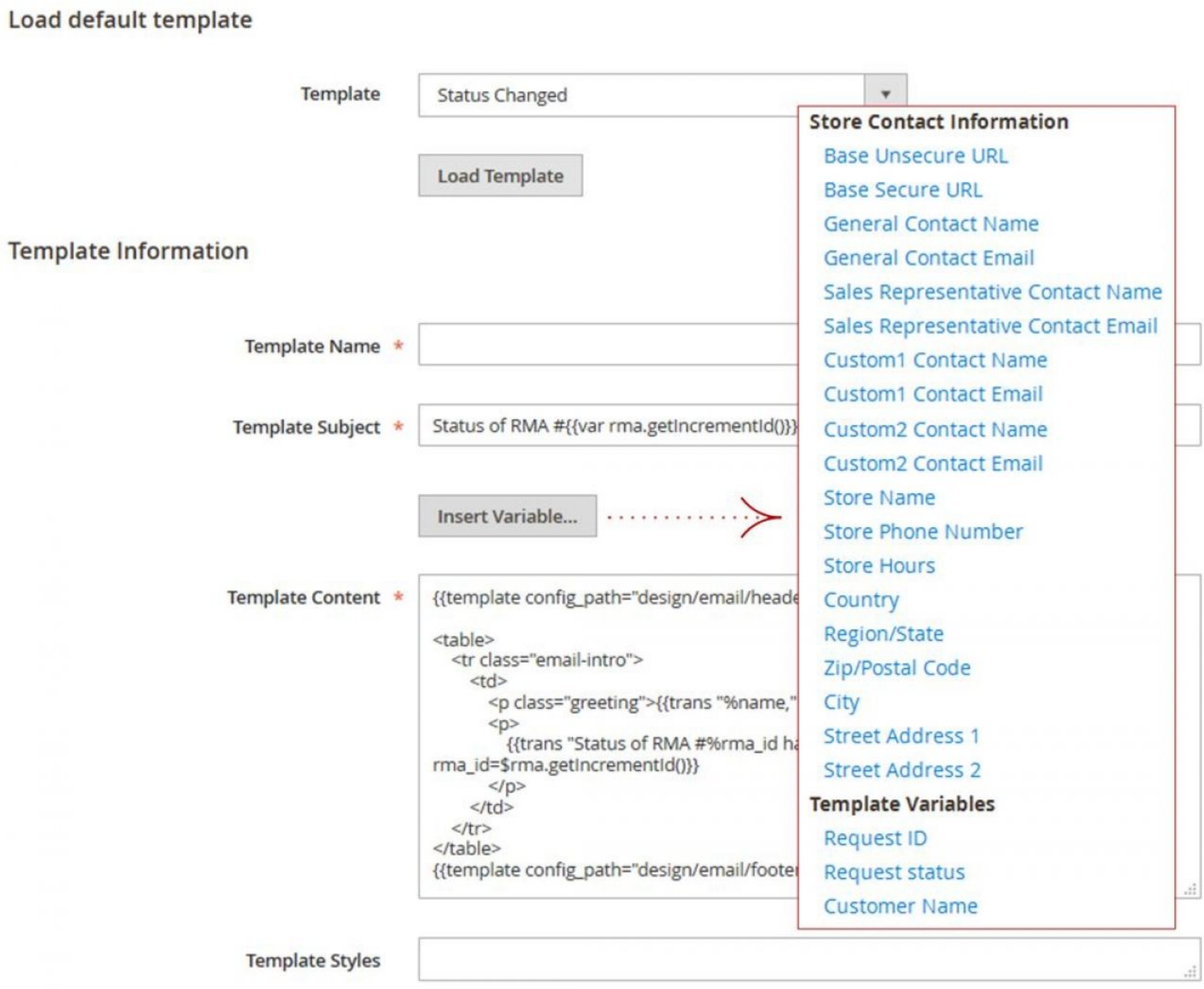

Image 8. Create an email template using variables

NOTICE
To set up the use of email templates, go to Email templates.

3.4. View RMA request

Sales > Exto RMA > Requests

A list of customer requests can be on viewed on the **RMA Requests** page.

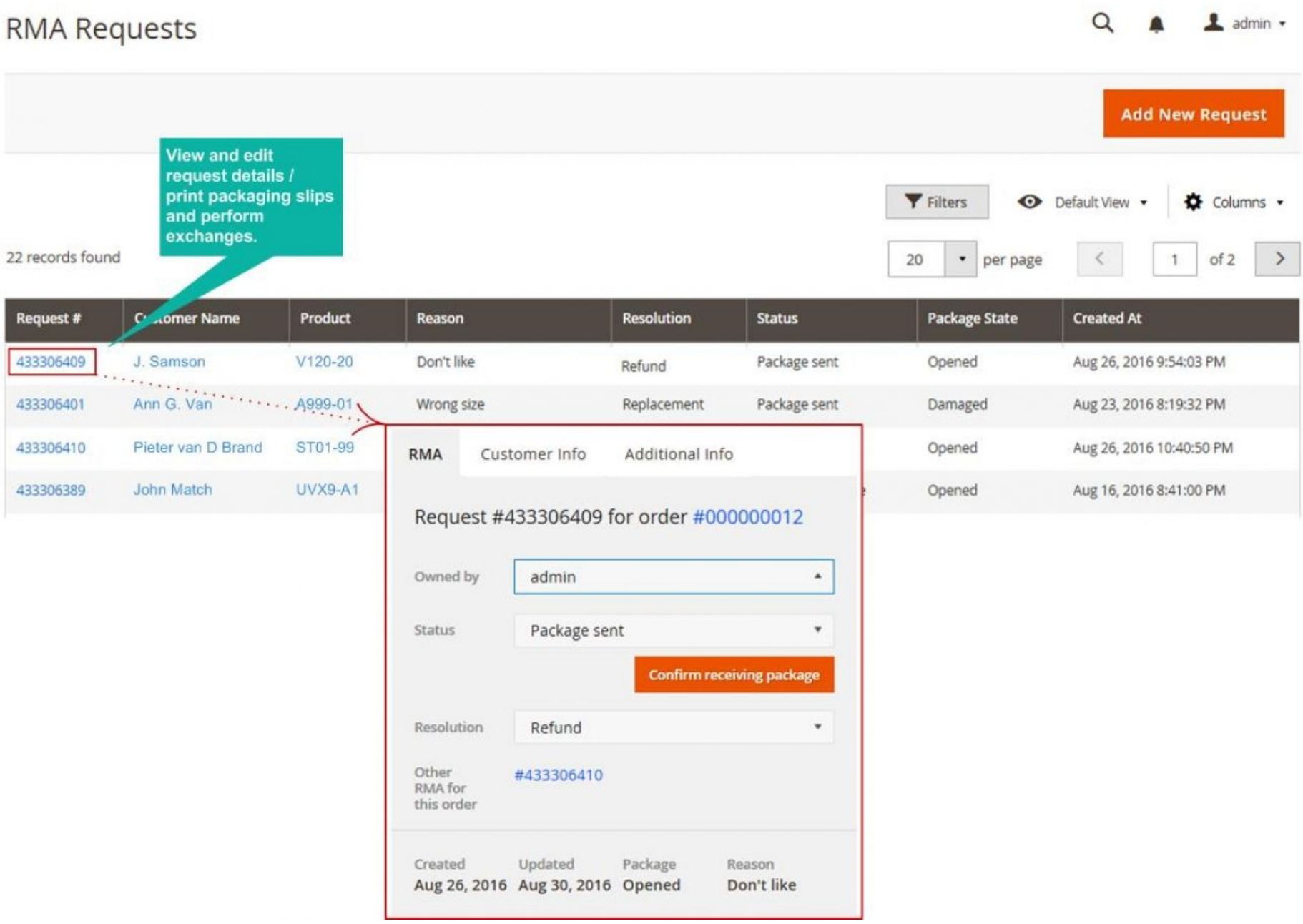

Image 9. View RMA requests

Click **Columns** to ensure the RMA request details you wish to view are displayed. From here you can view and edit a request, print packing slips, and, as an alternative to refunding a customer, perform an exchange.

3.5. Add new RMA request

Sales > Exto RMA > Requests

From the **RMA requests** page, you can create a return request for one or more items in a customer's order.

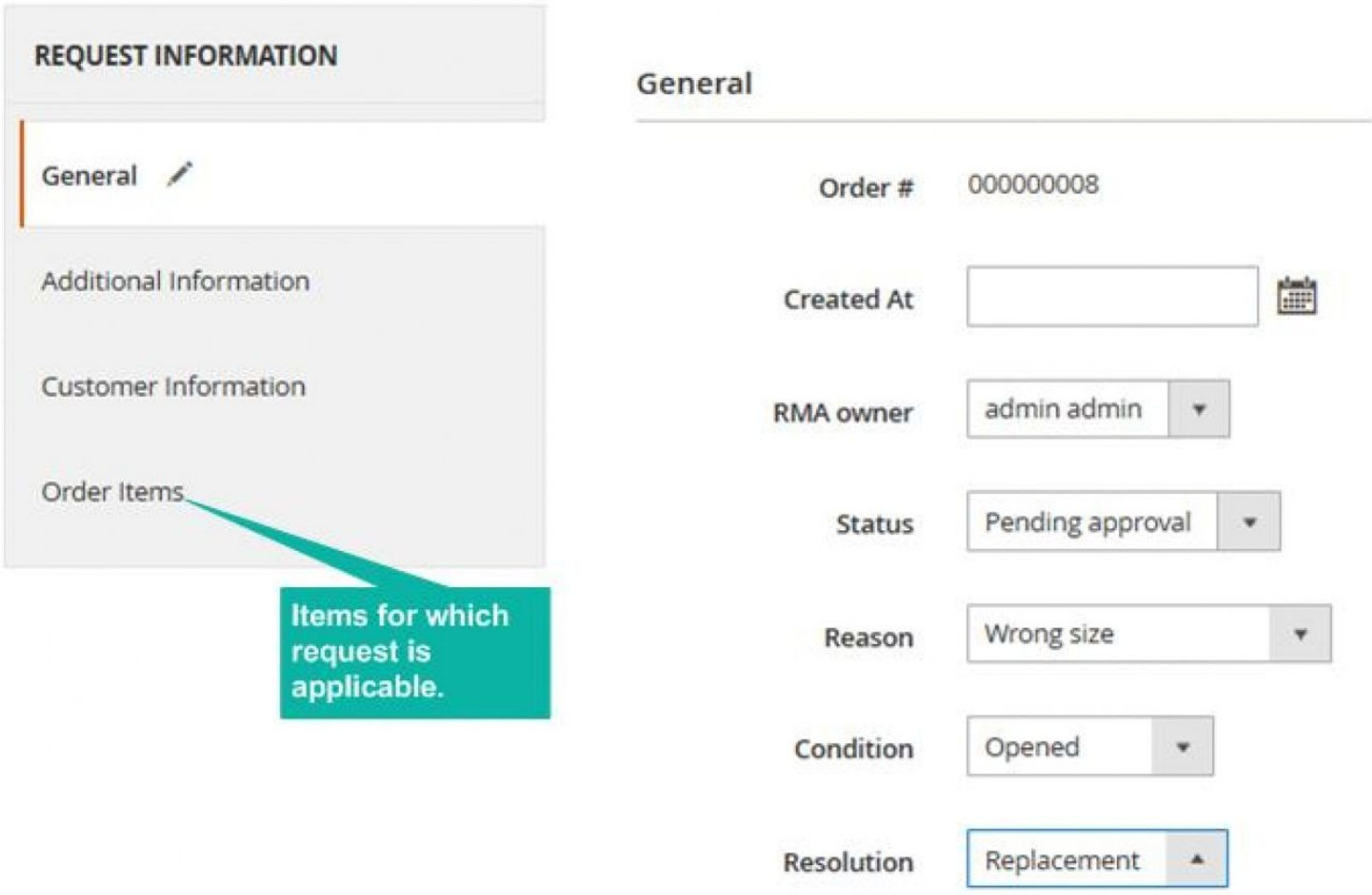

Image 10. Create a request

1. When you click on the **Add New Request** button, the **Select Order** page will be displayed.
2. Select a customer order for which you want to add a request.
3. On the **Order Items** tab, you can select the items to which the request applies.
4. Click **Save Request**.

> NOTICE
> See the Configuration chapter for help on configuring drop-down options and workflow statuses.

3.6. Working with RMA requests

Sales > Exto RMA > Requests

Administrators can manage requests in the **RMA Requests** section where a list of current requests and their statuses is displayed. When a request's status is changed, the customer is notified and can view the new status on their **My Requests** page. The customer may communicate with administrators on the message thread for the request.

Each message status, if configured in the workflow, triggers a new step and call to action, e.g. if a package is received, the administrator may approve the request.

Workflow statuses and resolutions are managed in the **Exto RMA** section.

On the **Requests** page, administrators can select a new status from the drop-down list. The action button (**Approve** in the example below) will be set to the next default action but can be overridden by a selection from the drop-down list.

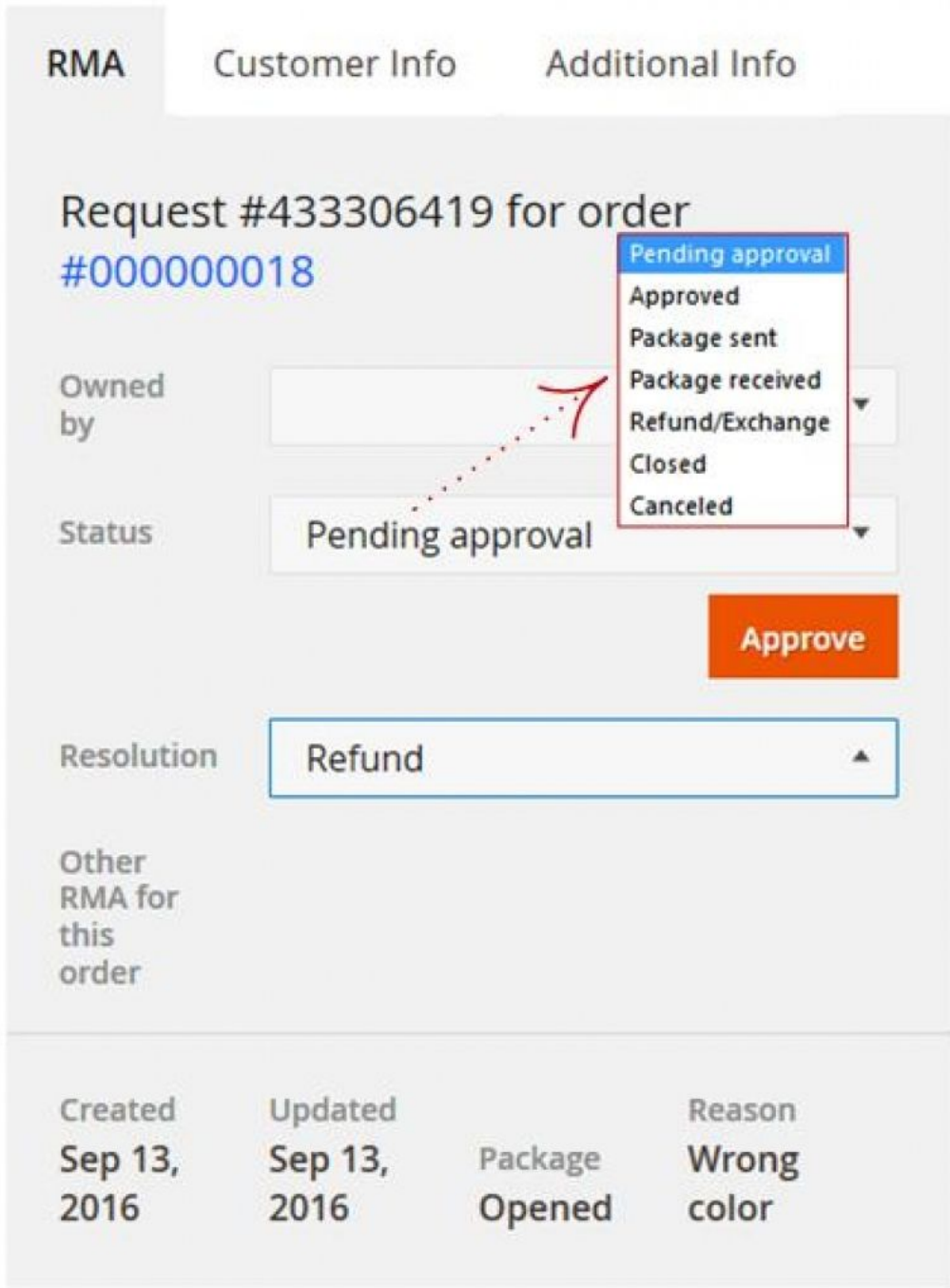

Image 11. Change a request status

> NOTICE
>
> See the **Configuration** chapter for help on configuring drop-down options and workflow statuses.

3.7. Send and receive messages

Sales > Exto RMA > Requests

Administrators can send message to clients and receive messages via the internal instant messaging system. Messages are color-coded to help quickly differentiate between administrator and customer responses.

The **Select Quick Response** feature enables faster communication and helps to keep responses standard. These responses are defined in the **Exto RMA** section under Manage Options.

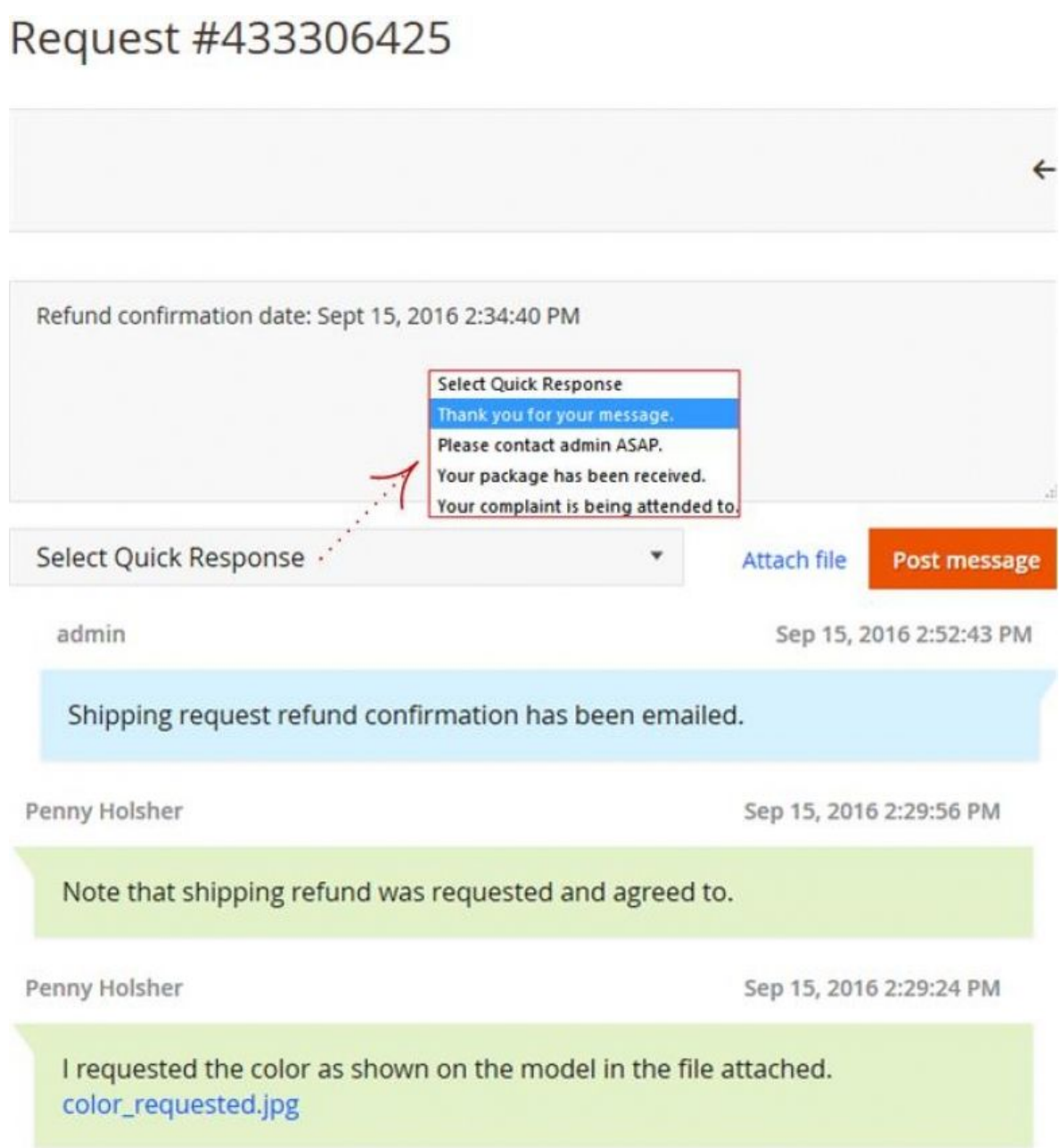

Image 12. Instant messaging between administrator and customer

3.8. Internal communication

Sales > Exto RMA > Requests

Administrators can create internal notes for individual requests to share with colleagues.

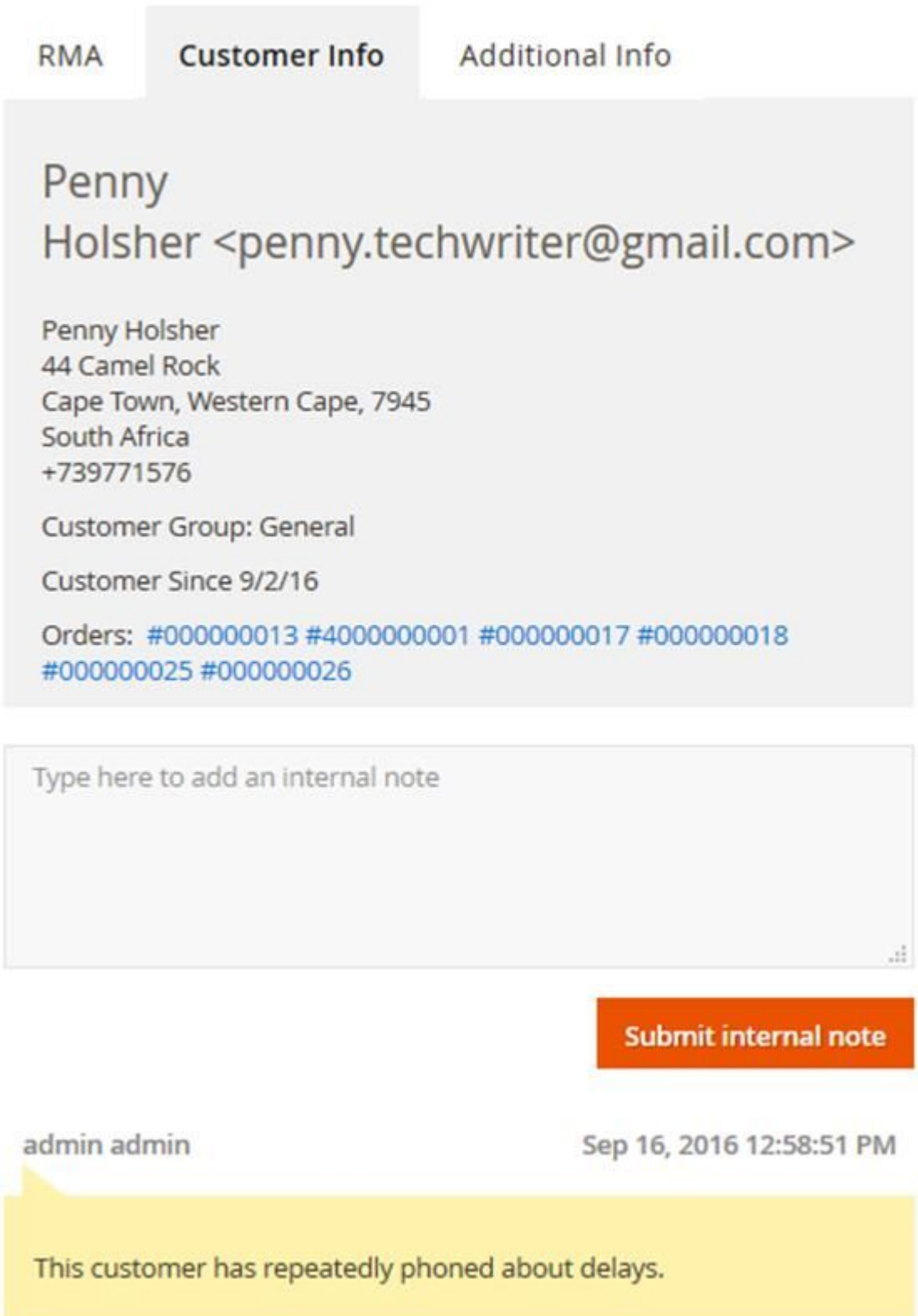

Image 13. Submit an internal note

3.9. Additional information

Sales > Exto RMA > Requests

On the **Additional Info** tab, administrators can view and edit additional information that has been defined in custom fields in the **Exto RMA** section. Administrators can define these custom fields as optional or mandatory:

Sales > Exto RMA > Custom Fields

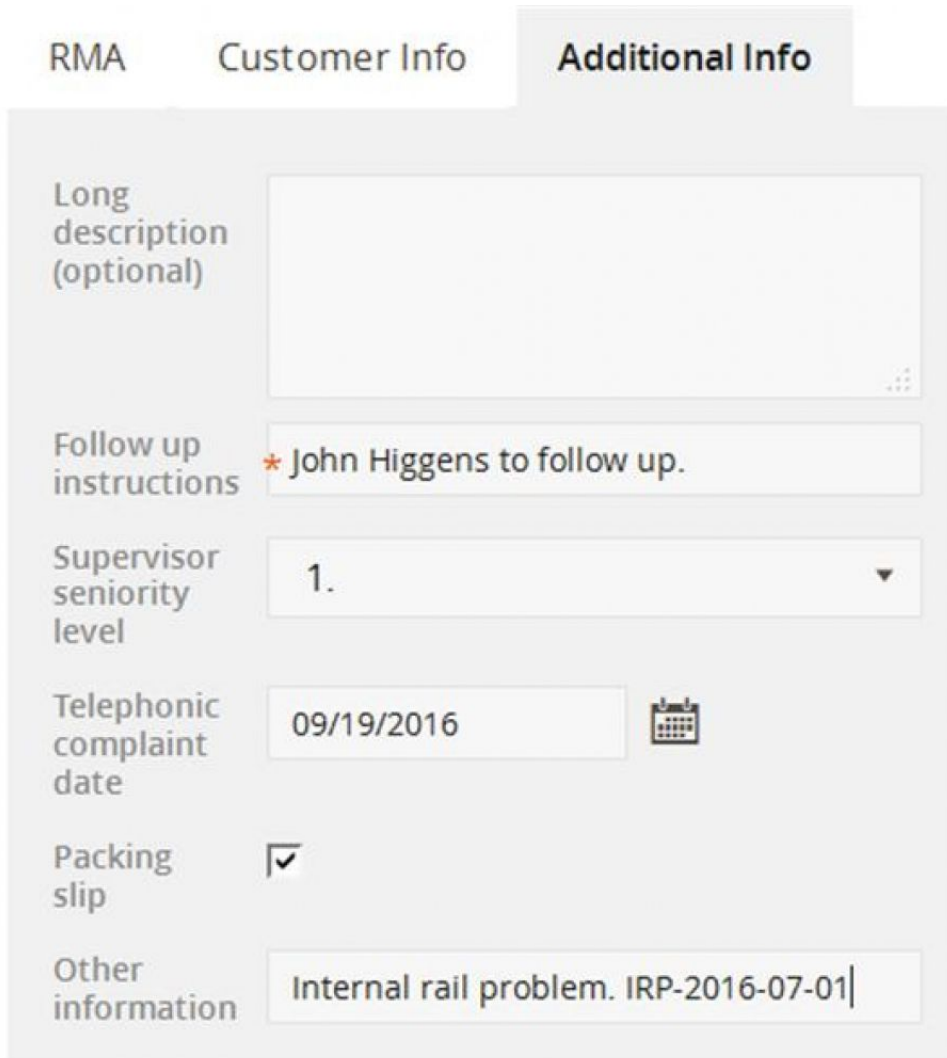

Image 14. View customized optional and mandatory additional information

3.10. Perform an exchange

Sales > Exto RMA > Requests

When you edit an existing request or add a new one, you have the option to perform an exchange instead of another action, like a refund. To do this, click **Exchange**, choose an existing customer or create a new one, and follow the prompts to create a new order. If you select an existing customer, pre-filled fields will be displayed with existing customer information.

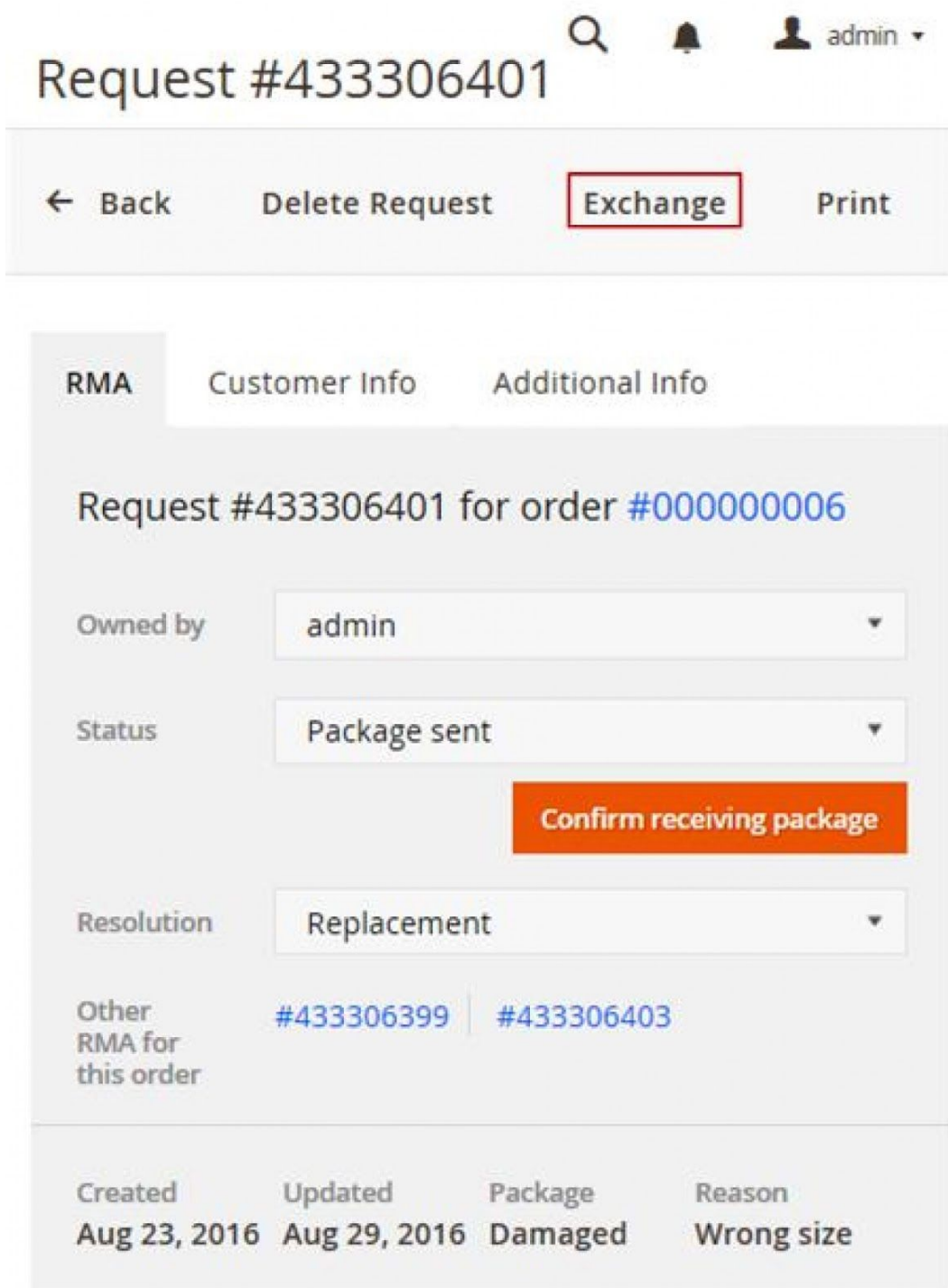

Image 15. Perform an exchange

4. Customer Interface

4.1. RMA page

Home page > My Returns

Customers can manage and request returns from their **My Returns** page. Only orders with a status of **Complete** can be returned. The customer can select the product or products they want to return for each order as well as the quantity if more than one item of a product was purchased.

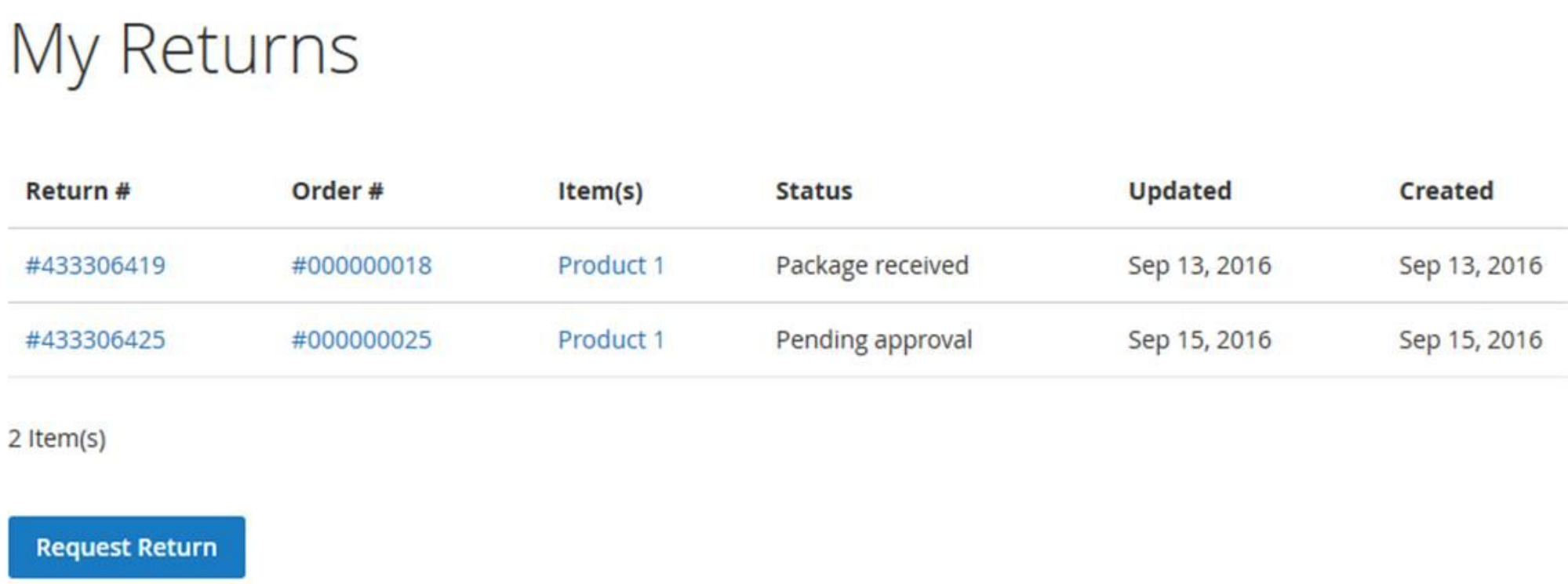

Image 16. List of customer returns

4.2. Request return

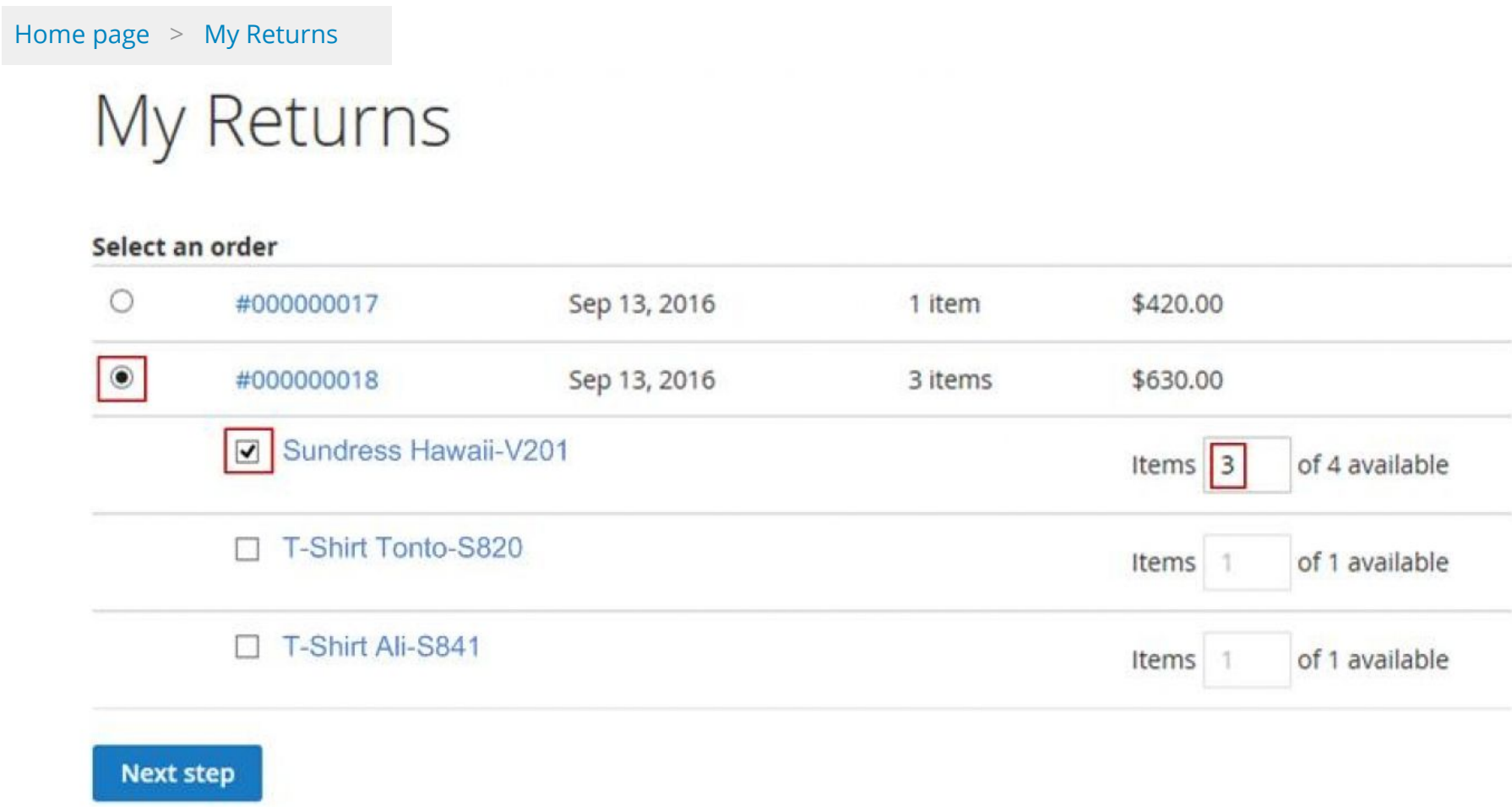

Image 17. A customer may select the the product or products to be returned and the quantities of each

After initiating a return request on the **My Returns page** above, the customer must complete all mandatory fields on the **My Returns** form: Return reason, Package condition and Desired resolution as well as any custom fields that have been enabled for requests with a **New request** status. The customer may also upload a file, e.g. a photograph of the item.

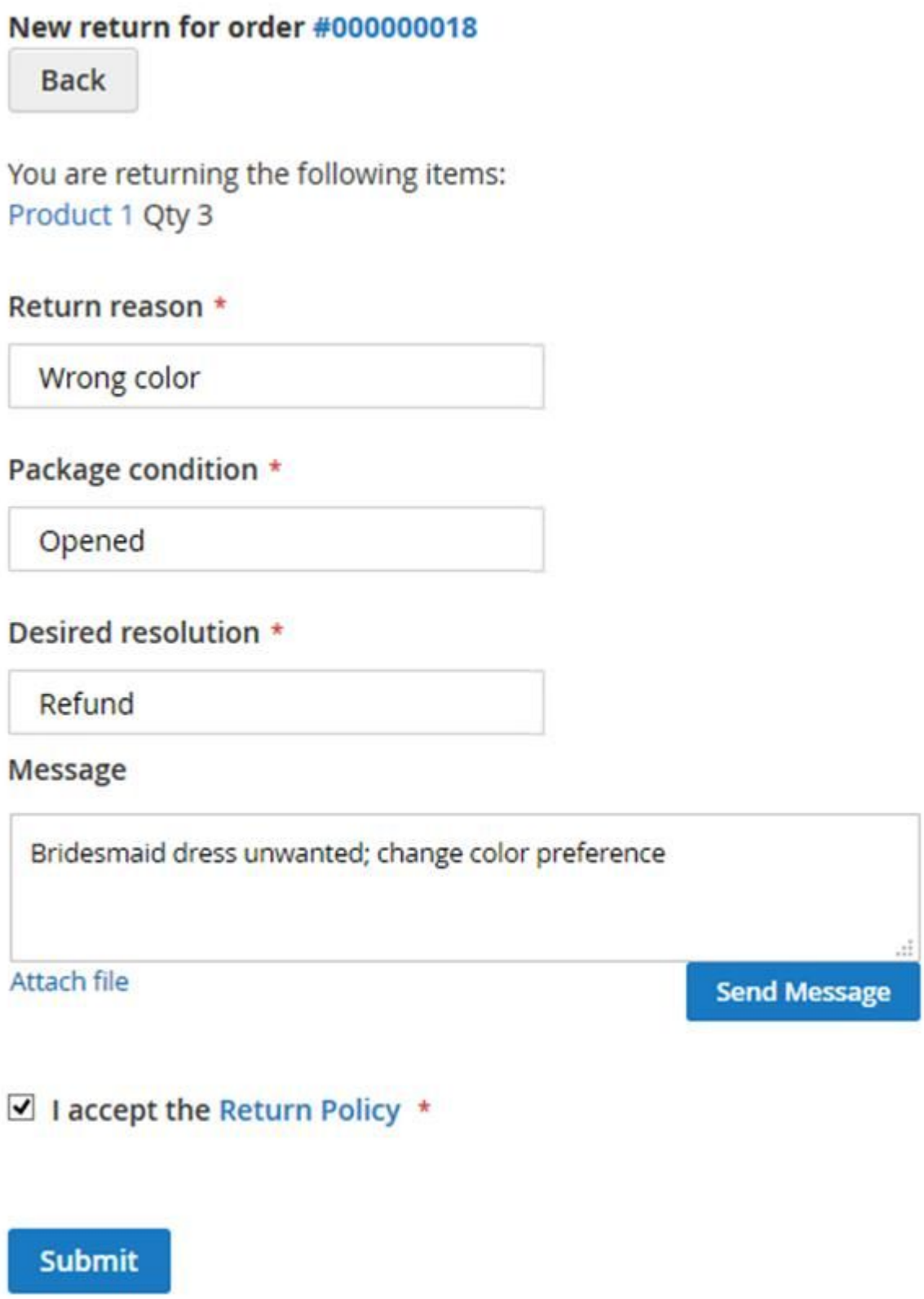

Image 18. Create a customer return

After the request has been submitted, the customer will receive confirmation they have submitted a request and can print a copy of the packaging slip to affix to the package they are returning. The request will have a status of **Pending approval** until an administrator has reviewed the request. Every requests is assigned to an administrator who will receive all email notifications pertaining to that request.

4.3. View status of request

The customer may at any time from their **My Returns** page view the status and progress of their request, send a message to the administrator if they have a query, or reprint a packaging slip.

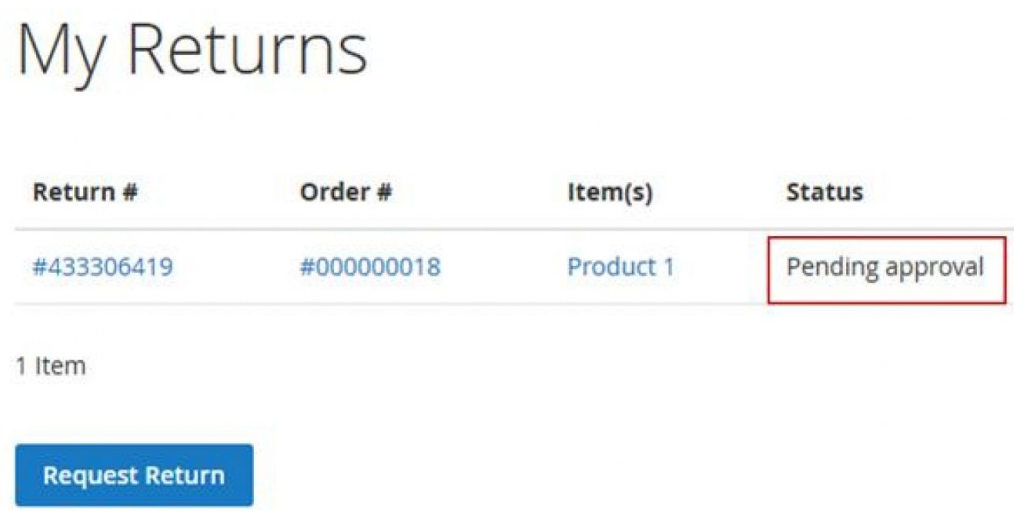

Image 19. View status of a return

4.4. Send and receive messages

Home page > My Returns

The customer may at any time send the administrator a message and upload a file. Each communication between an administrator and customer is added to the message thread for a particular return request.

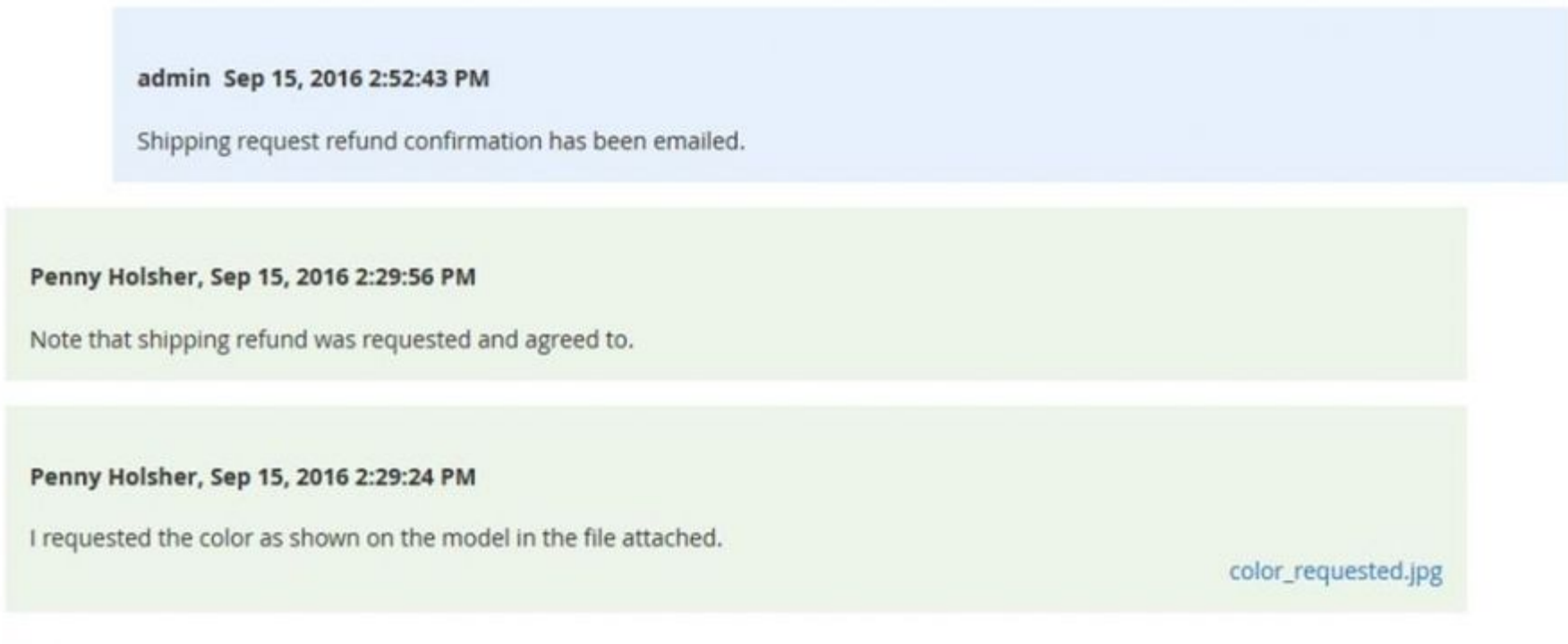

Image 20. Customer message thread

4.5. Print packaging slip

Home page > My Returns

To print a packaging slip, a customer can select the relevant return request on their **My Returns** page and then print it from their browser.

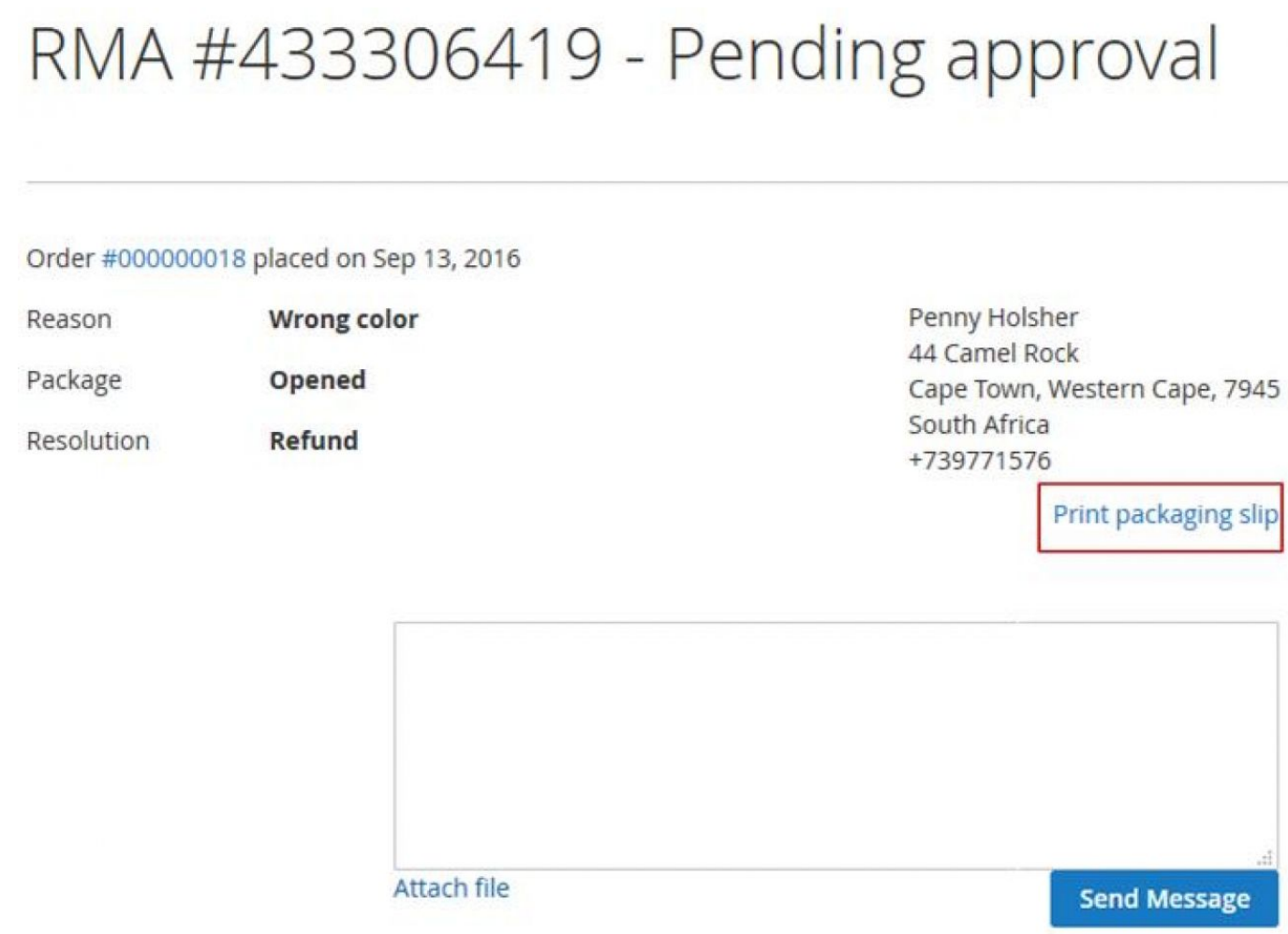

Image 21. Print packaging slip

4.6. Guest RMA

Home page

> NOTICE
> Guest RMA must be enabled in the **Configuration** section by an administrator.

Visitors who are not logged in with an account number but wish to request a return can log in with their order number on the RMA **Home** page using the **Product Return** link at the bottom of the page. Guests must enter a valid email address and order number for the request to be processed.

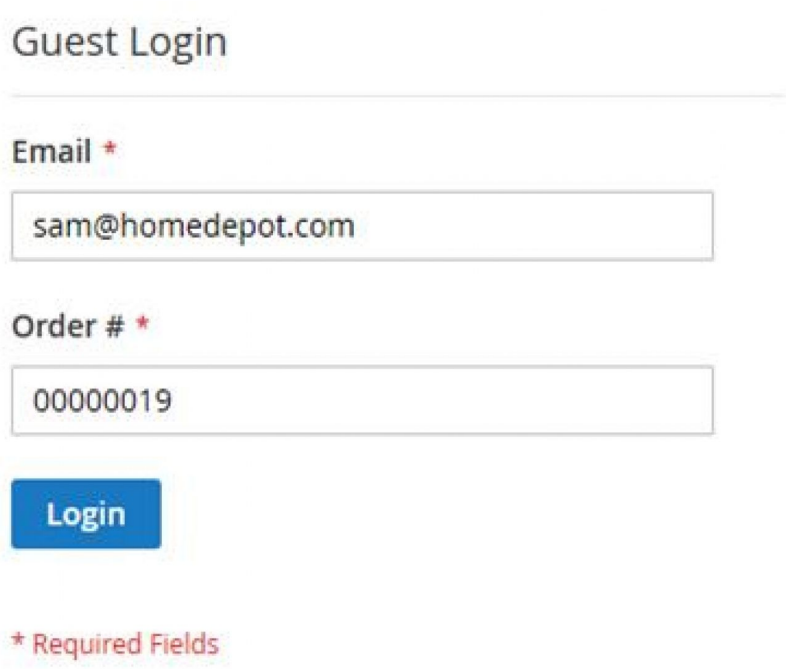

Image 22. Log in as a guest