

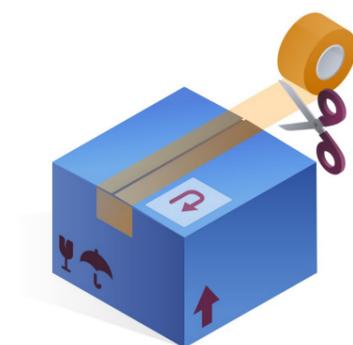
RMA for Magento 2.0

USER GUIDE

Version 1.0

✉ support@exto.io

🌐 <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.

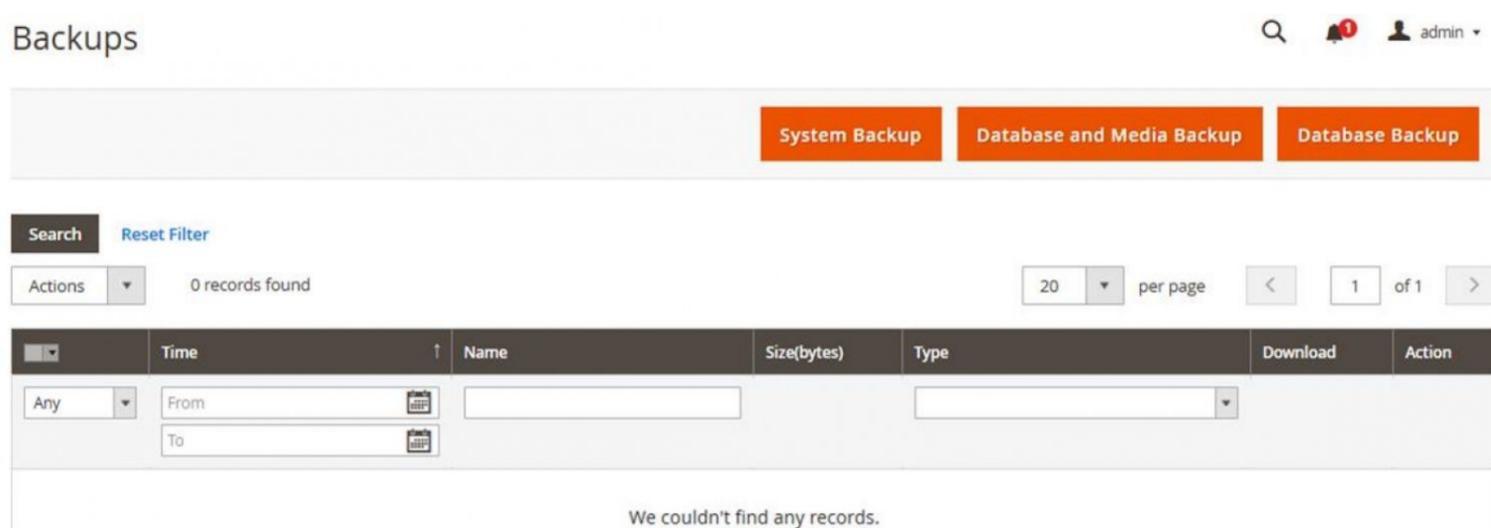


Image 1. Create backups

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 Extto_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](#) > [Extto 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.

Show RMA interface for customer
[store view] Yes ▼

Allow guest returns
[store view] Yes ▼

Return deadline, days
[store view] 7

Autoassign new requests to
[store view] user ▼

Page title in customer area
[store view]

Return address
[store view] 118, Block 15
High Drive
1806

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

Return Policy

Return policy CMS block
[store view] Return Policy ▼

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**.



The image shows a configuration interface for email templates. It consists of three rows, each with a label and a dropdown menu. The first row is labeled 'Email sender [store view]' and has a dropdown menu with 'Customer Support' selected. The second row is labeled 'From admin [store view]' and has a dropdown menu with 'From Admin (Default)' selected. The third row is labeled 'From customer [store view]' and has a dropdown menu with 'From Customer (Default)' selected.

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.

Name *

Label

Next workflow status
Which status must follow after this one in your return routine

Caption

	Corresponding customer action	Confirmation text
<input type="text" value="Default Store View"/>	<input type="text" value="Confirm"/>	

The action button which will be displayed to customers when this status is on. E.g. "Confirm package"

Send email to customer

Select email template

Send email to admin

Select email template

Add message
This message will be added to the RMA request thread

Sort Order

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**.

Name *

Frontend Label Default Store View
Label for customers

Type

Options Default Store View
One per line

Is required

Visible for customer

Editable for customer in statuses
 Approved
 Package sent
 Package received
 Refund/Exchange
Customer can update this field while the request is in selected statuses (uncheck all for Never)

Add to shipping label

Sort Order

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.

The screenshot shows a form for adding an RMA reason. It contains the following fields and buttons:

- Name ***: A text input field containing the text "Wrong size".
- Title**: A text input field containing "Default Store View" and a smaller text input field containing "Wrong size".
- Sort Order**: A text input field containing the number "10".
- Delete**: A button located below the Sort Order field.
- Add Option**: A button located below the Delete button.

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.

- 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.
- In **Template Styles**, you can add CSS styles for the template.
- 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.

Load default template

Template: Status Changed

Load Template

Template Information

Template Name *

Template Subject * Status of RMA #{{var rma.getIncrementId()}}

Insert Variable...

Template Content *


```

    {{template config_path="design/email/header" type="html"}}
    <table>
      <tr class="email-intro">
        <td>
          <p class="greeting">{{trans "%name,"}}
          <p>
            {{trans "Status of RMA #%rma_id ha
            rma_id=$rma.getIncrementId()}}
          </p>
        </td>
      </tr>
    </table>
    {{template config_path="design/email/footer" type="html"}}
    
```

Template Styles

Store Contact Information

- Base Unsecure URL
- Base Secure URL
- General Contact Name
- General Contact Email
- Sales Representative Contact Name
- Sales Representative Contact Email
- Custom1 Contact Name
- Custom1 Contact Email
- Custom2 Contact Name
- Custom2 Contact Email
- Store Name
- Store Phone Number
- Store Hours
- Country
- Region/State
- Zip/Postal Code
- City
- Street Address 1
- Street Address 2

Template Variables

- Request ID
- Request status
- Customer Name

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 viewed on the **RMA Requests** page.

The screenshot shows the 'RMA Requests' interface. At the top right, there is a search icon, a notification bell, and a user profile for 'admin'. Below this is a white bar with an orange 'Add New Request' button. A teal callout box points to the first row of the table with the text: 'View and edit request details / print packaging slips and perform exchanges.' The table has 8 columns: Request #, Customer Name, Product, Reason, Resolution, Status, Package State, and Created At. The first row is highlighted with a red box. Below the table, there are controls for 'Filters', 'Default View', and 'Columns'. A pagination bar shows '20 per page' and '1 of 2'. A detailed view for request #433306409 is shown, including fields for 'Owned by' (admin), 'Status' (Package sent), 'Resolution' (Refund), and 'Other RMA for this order' (#433306410). A red 'Confirm receiving package' button is also visible. At the bottom of the detailed view, there is a small table with columns: Created, Updated, Package, Reason.

Request #	Customer Name	Product	Reason	Resolution	Status	Package State	Created At
433306409	J. Samson	V120-20	Don't like	Refund	Package sent	Opened	Aug 26, 2016 9:54:03 PM
433306401	Ann G. Van	A999-01	Wrong size	Replacement	Package sent	Damaged	Aug 23, 2016 8:19:32 PM
433306410	Pieter van D Brand	ST01-99				Opened	Aug 26, 2016 10:40:50 PM
433306389	John Match	UVX9-A1				Opened	Aug 16, 2016 8:41:00 PM

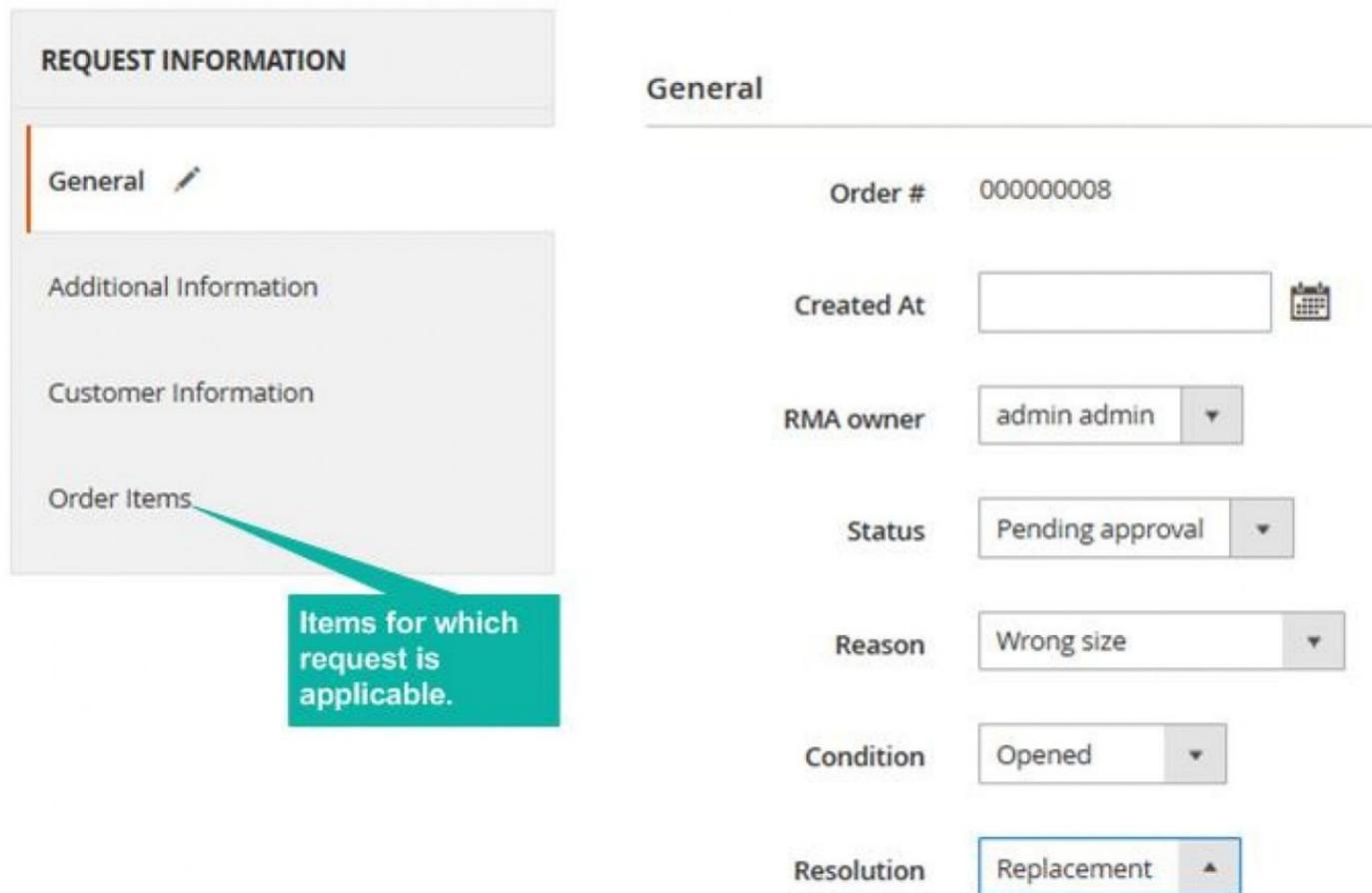
Image 9. View RMA requests

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.



REQUEST INFORMATION

General 

Additional Information

Customer Information

Order Items

Items for which request is applicable.

General

Order # 000000008

Created At 

RMA owner admin admin ▼

Status Pending approval ▼

Reason Wrong size ▼

Condition Opened ▼

Resolution Replacement ▲

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.

The screenshot shows the RMA interface with the following details:

- Request #433306419 for order #000000018
- Owned by: [Empty field]
- Status: Pending approval (dropdown menu is open showing options: Pending approval, Approved, Package sent, Package received, Refund/Exchange, Closed, Canceled)
- Approve button (highlighted in orange)
- Resolution: Refund
- Other RMA for this order: [Empty field]
- Created: Sep 13, 2016
- Updated: Sep 13, 2016
- Package: Opened
- Reason: Wrong color

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](#).

Request #433306425

Refund confirmation date: Sept 15, 2016 2:34:40 PM

Select Quick Response

- Thank you for your message.
- Please contact admin ASAP.
- Your package has been received.
- Your complaint is being attended to.

Select Quick Response Attach file Post message

admin Sep 15, 2016 2:52:43 PM

Shipping request refund confirmation has been emailed.

Penny Holsher Sep 15, 2016 2:29:56 PM

Note that shipping refund was requested and agreed to.

Penny Holsher Sep 15, 2016 2:29:24 PM

I requested the color as shown on the model in the file attached.
[color_requested.jpg](#)

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.

RMA **Customer Info** Additional Info

**Penny
Holsher** <penny.techwriter@gmail.com>

Penny Holsher
44 Camel Rock
Cape Town, Western Cape, 7945
South Africa
+739771576

Customer Group: General

Customer Since 9/2/16

Orders: #000000013 #4000000001 #000000017 #000000018
#000000025 #000000026

Type here to add an internal note

Submit internal note

admin admin Sep 16, 2016 12:58:51 PM

This customer has repeatedly phoned about delays.

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](#)

RMA	Customer Info	Additional Info
Long description (optional)	<input type="text"/>	
Follow up instructions	<input type="text" value="* John Higgins to follow up."/>	
Supervisor seniority level	<input type="text" value="1."/> ▼	
Telephonic complaint date	<input type="text" value="09/19/2016"/>	
Packing slip	<input checked="" type="checkbox"/>	
Other information	<input type="text" value="Internal rail problem. IRP-2016-07-01"/>	

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.

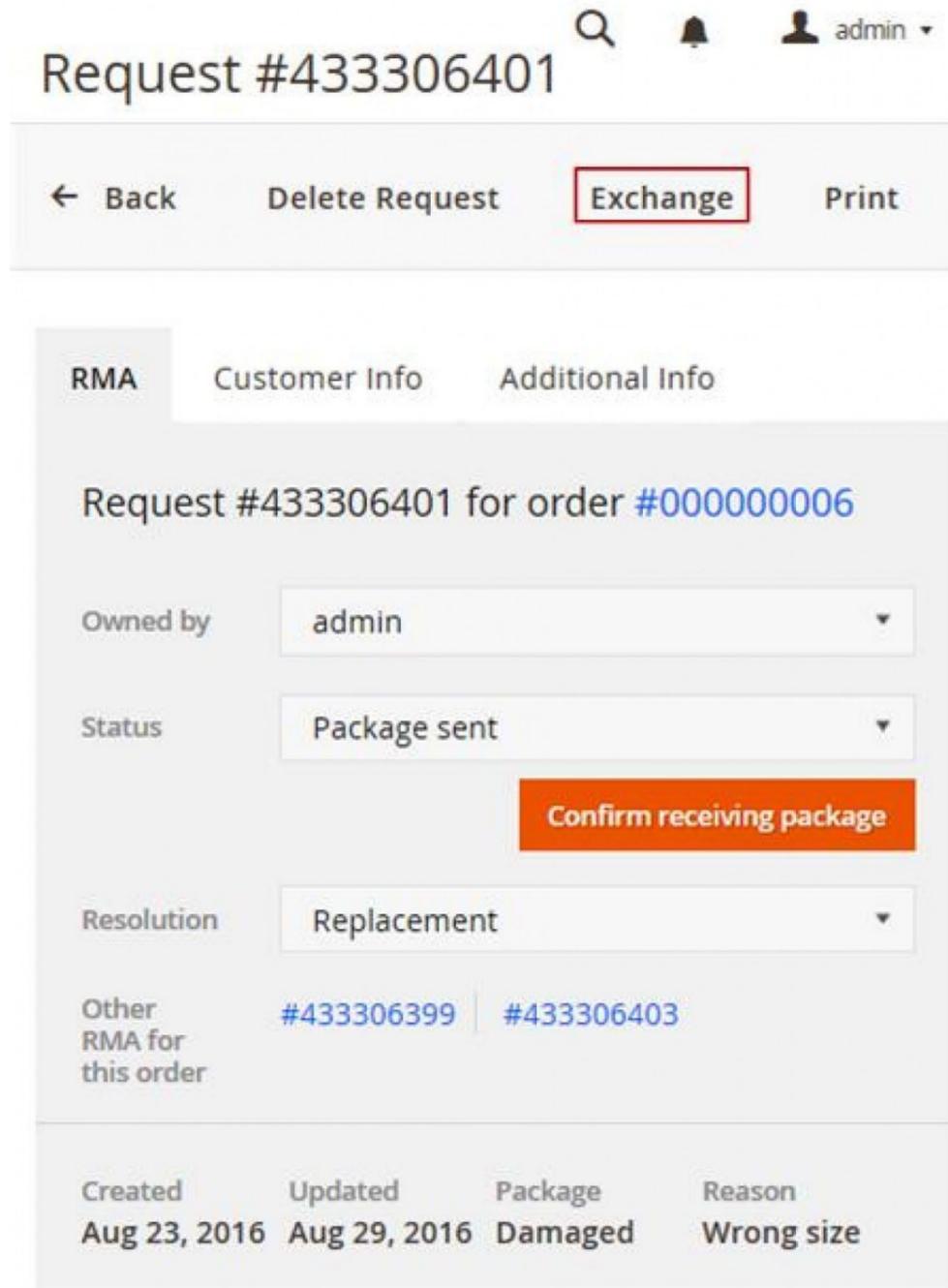


Image 15. Perform an exchange

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.

My Returns

Return #	Order #	Item(s)	Status	Updated	Created
#433306419	#000000018	Product 1	Package received	Sep 13, 2016	Sep 13, 2016
#433306425	#000000025	Product 1	Pending approval	Sep 15, 2016	Sep 15, 2016

2 Item(s)

[Request Return](#)

Image 16. List of customer returns

4.2. Request return

[Home page](#) > [My Returns](#)

My Returns

Select an order

<input type="radio"/>	#000000017	Sep 13, 2016	1 item	\$420.00
<input checked="" type="radio"/>	#000000018	Sep 13, 2016	3 items	\$630.00
<input checked="" type="checkbox"/>	Sundress Hawaii-V201		Items <input type="text" value="3"/>	of 4 available
<input type="checkbox"/>	T-Shirt Tonto-S820		Items <input type="text" value="1"/>	of 1 available
<input type="checkbox"/>	T-Shirt Ali-S841		Items <input type="text" value="1"/>	of 1 available

[Next step](#)

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.

New return for order #000000018[Back](#)

You are returning the following items:

[Product 1](#) Qty 3**Return reason ***

Wrong color

Package condition *

Opened

Desired resolution *

Refund

Message

Bridesmaid dress unwanted; change color preference

[Attach file](#)[Send Message](#) **I accept the Return Policy ***[Submit](#)

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.

 Your return request #433306419 has been submitted. Our staff will review it and get in touch with you soon. Thank you

4.3. View status of request

[Home page](#) > [My Returns](#)

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.

My Returns

Return #	Order #	Item(s)	Status
#433306419	#000000018	Product 1	Pending approval

1 Item

[Request Return](#)

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.

admin Sep 15, 2016 2:52:43 PM
Shipping request refund confirmation has been emailed.

Penny Holsher, Sep 15, 2016 2:29:56 PM
Note that shipping refund was requested and agreed to.

Penny Holsher, Sep 15, 2016 2:29:24 PM
I requested the color as shown on the model in the file attached.

[color_requested.jpg](#)

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.

RMA #433306419 - Pending approval

Order #000000018 placed on Sep 13, 2016

Reason	Wrong color	Penny Holsher 44 Camel Rock Cape Town, Western Cape, 7945 South Africa +739771576
Package	Opened	
Resolution	Refund	

[Print packaging slip](#)

[Attach file](#) [Send Message](#)

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.

Guest Login

Email *

Order # *

Login

* Required Fields

Image 22. Log in as a guest
