Refund Request for Magento 2

User Guide

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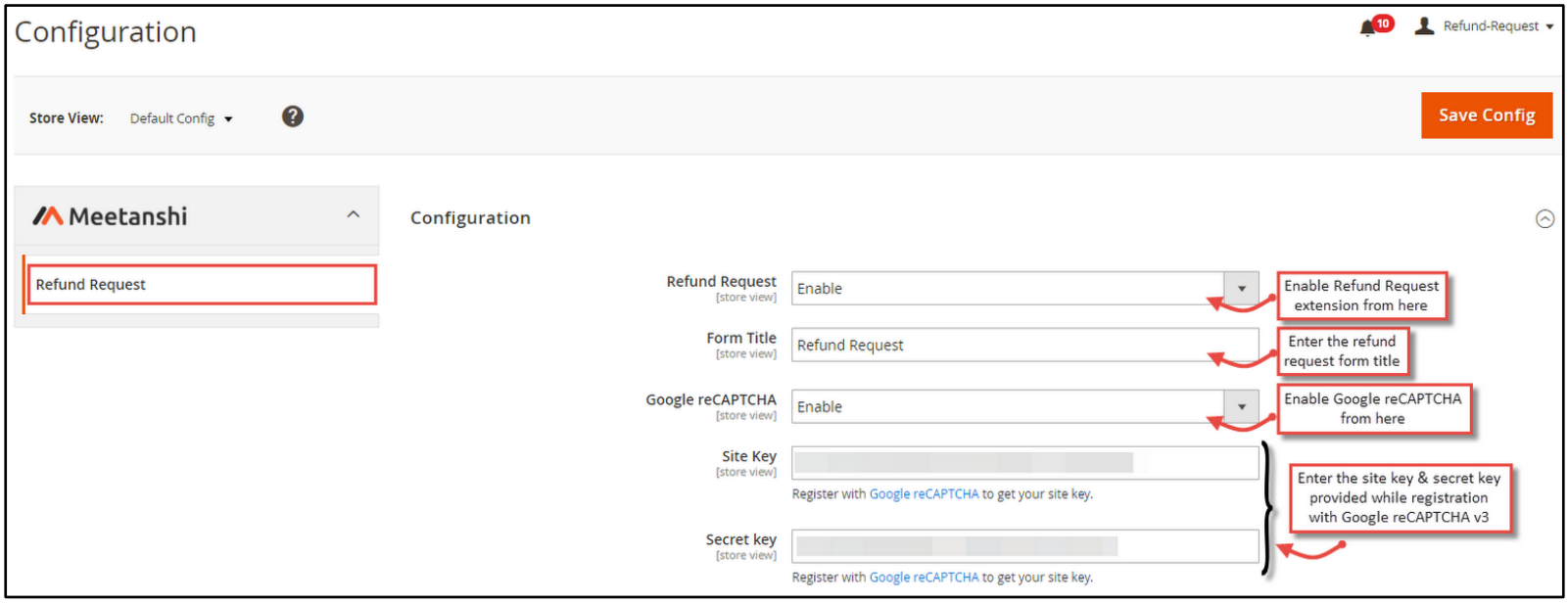
1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/RefundRequest
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/RefundRequest e via FTP.
- Login to your SSH and run below commands step by step:
  - php bin/magento setup:upgrade
  - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
  - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy –f
  - php bin/magento cache:flush

2. Configuration

To configure the extension, login to Magento 2 backend, move to **Stores → Configuration → Refund Request** where you can find various settings to configure the extension.

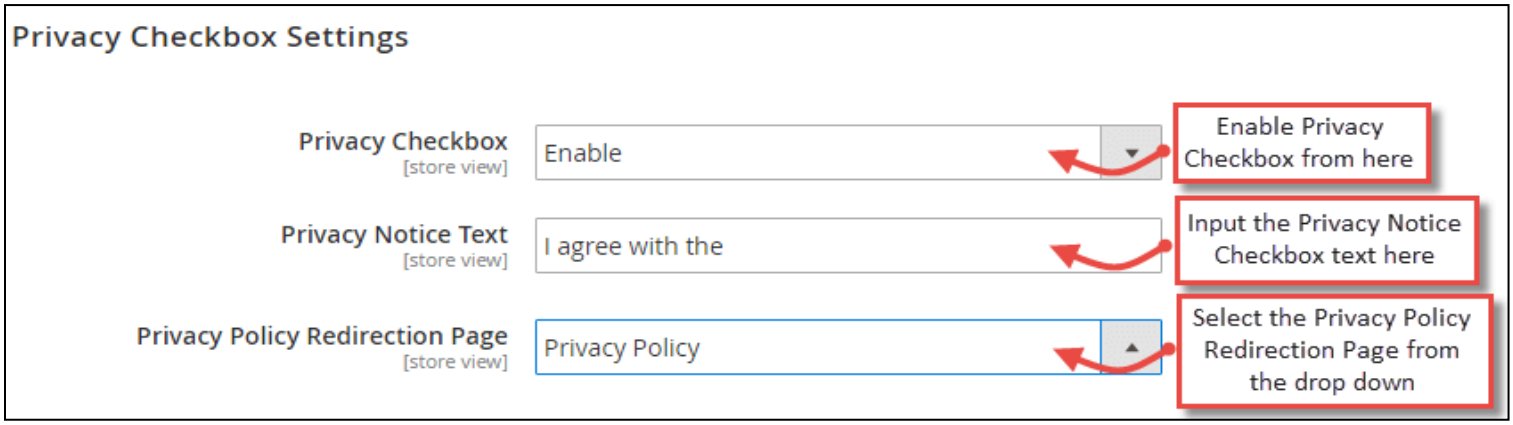
- **Refund Request:** Enable the extension from here.
- **Form Title:** Enter the refund request form title.
- **Google reCAPTCHA:** Enable the Google reCAPTCHA v3 to avoid spam refund requests.
- **Site Key:** Enter the site key provided while registration with Google reCAPTCHA v3.
- **Secret Key:** Enter the secret key provided while registration with Google reCAPTCHA v3.



3. Privacy Checkbox Settings

According to EU's GDPR, it' required to inform users about their personal data usage. Here, you get the settings to add privacy policy checkbox in the refund request form and mandate users to agree with it prior refund request submission. Follow the below steps to configure the privacy checkbox settings.

- **Privacy Checkbox:** Enable the privacy policy checkbox.
- **Privacy Notice Text:** Input the privacy notice text to show in the form.
- **Privacy Policy Redirection Page:** Select the Privacy Policy Redirection Page from the drop down to redirect users to read privacy policy of the store.



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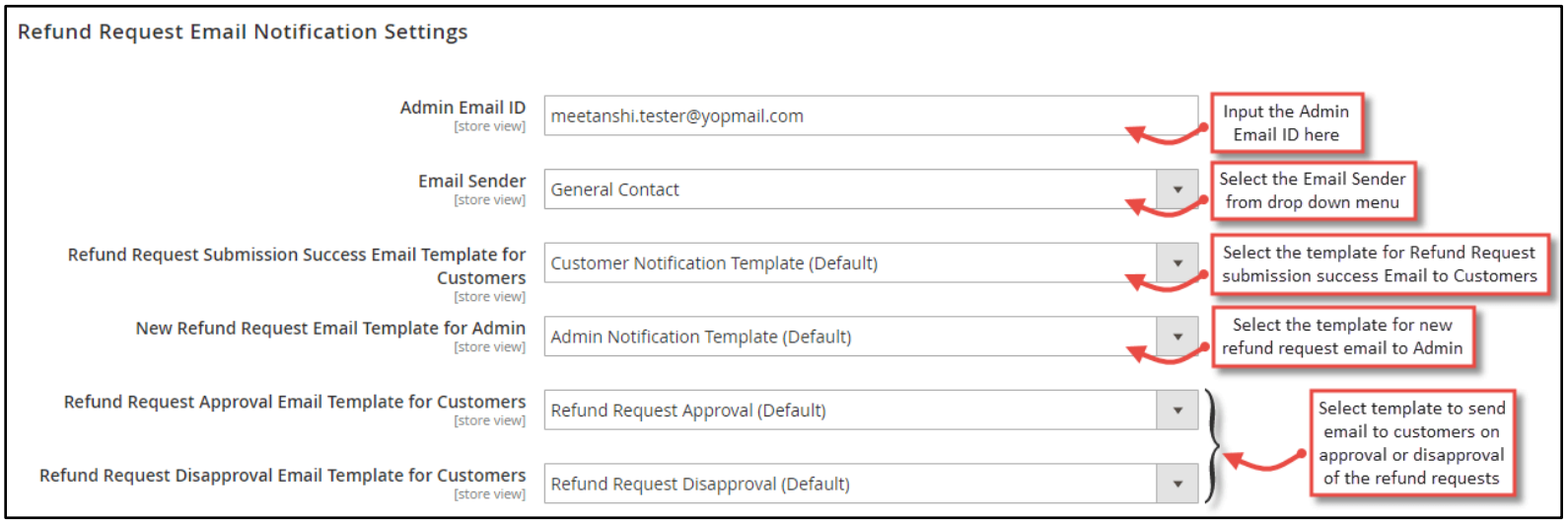
4. Refund Request Email Notification Settings

The extension facilitates sending email notifications both to the admin and to the customers on specific events. Configure the email settings as below.

- **Admin Email ID:** Enter the Admin Email ID.
- **Email Sender:** Select the Email Sender from dropdown menu.
- **Refund Request Submission Success Email Template for Customers:** Select the template to send refund request submission success email to customers.
- **New Refund Request Email Template for Admin:** Select the template to send email to the admin when a new refund request is submitted.
- **Refund Request Approval Email Template for Customers:** Select the template to send email when a customer's refund request is approved by the admin.
- **Refund Request Disapproval Email Template for Customers:** Select the template to send email when a customer's refund request is disapproved by the admin.



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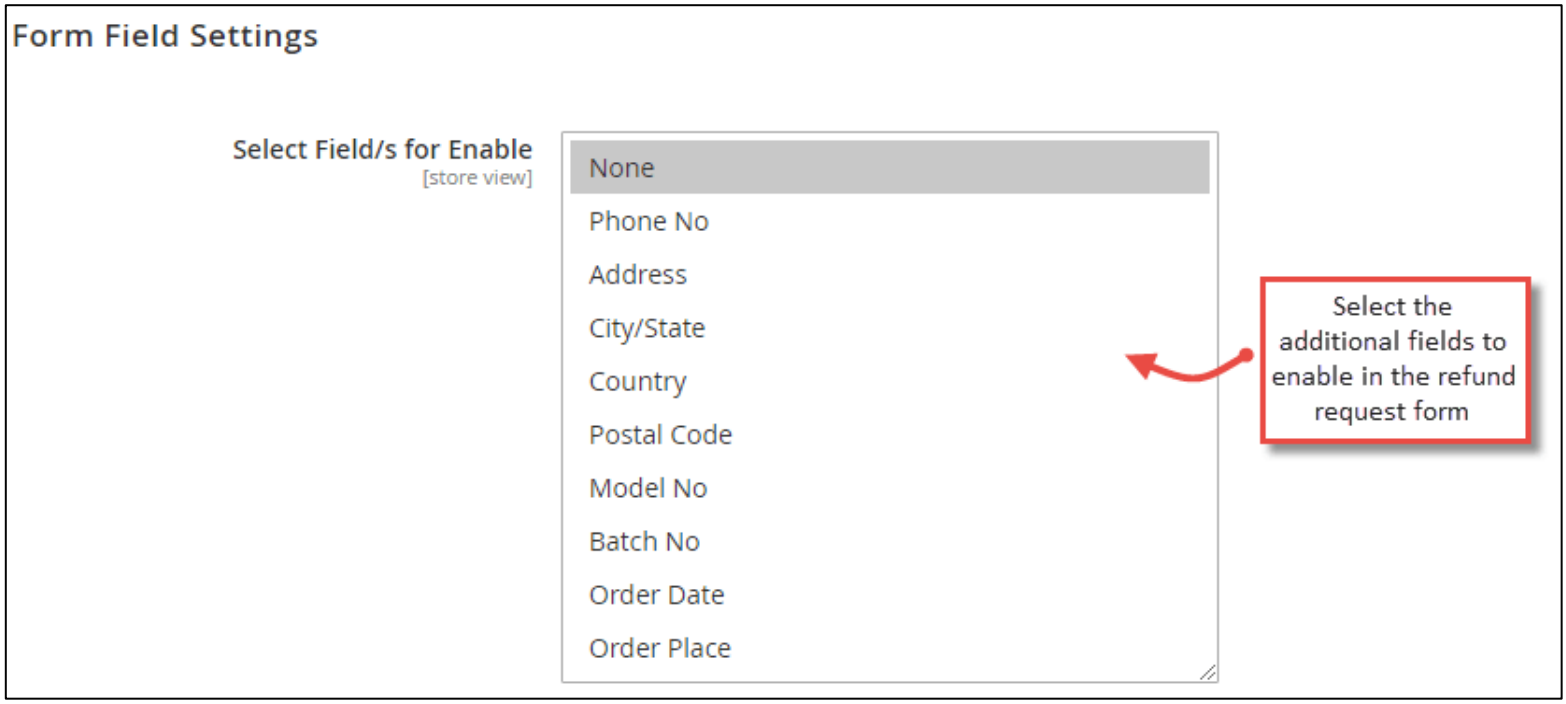
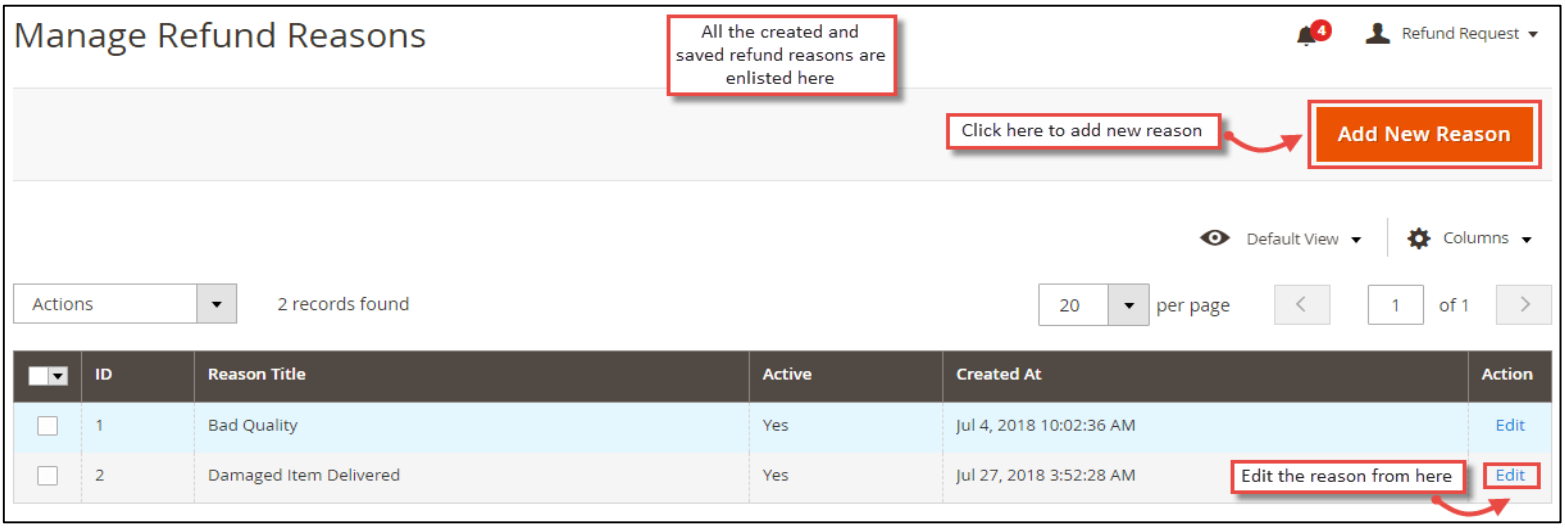
5. Form Field Settings

The refund request comes with some mandatory fields to be submitted by customers for refund request. But the extension facilitates with some extra form fields to add to the form and get the details from customers. You can select these extra fields to be added to the form using below setting.



6. Manage Refund Reasons

Admin can add refund reasons for customers to choose while submitting refund requests. These reasons can be added and managed by admin through a separate grid under **Refund Request → Manage Refund Reasons.**



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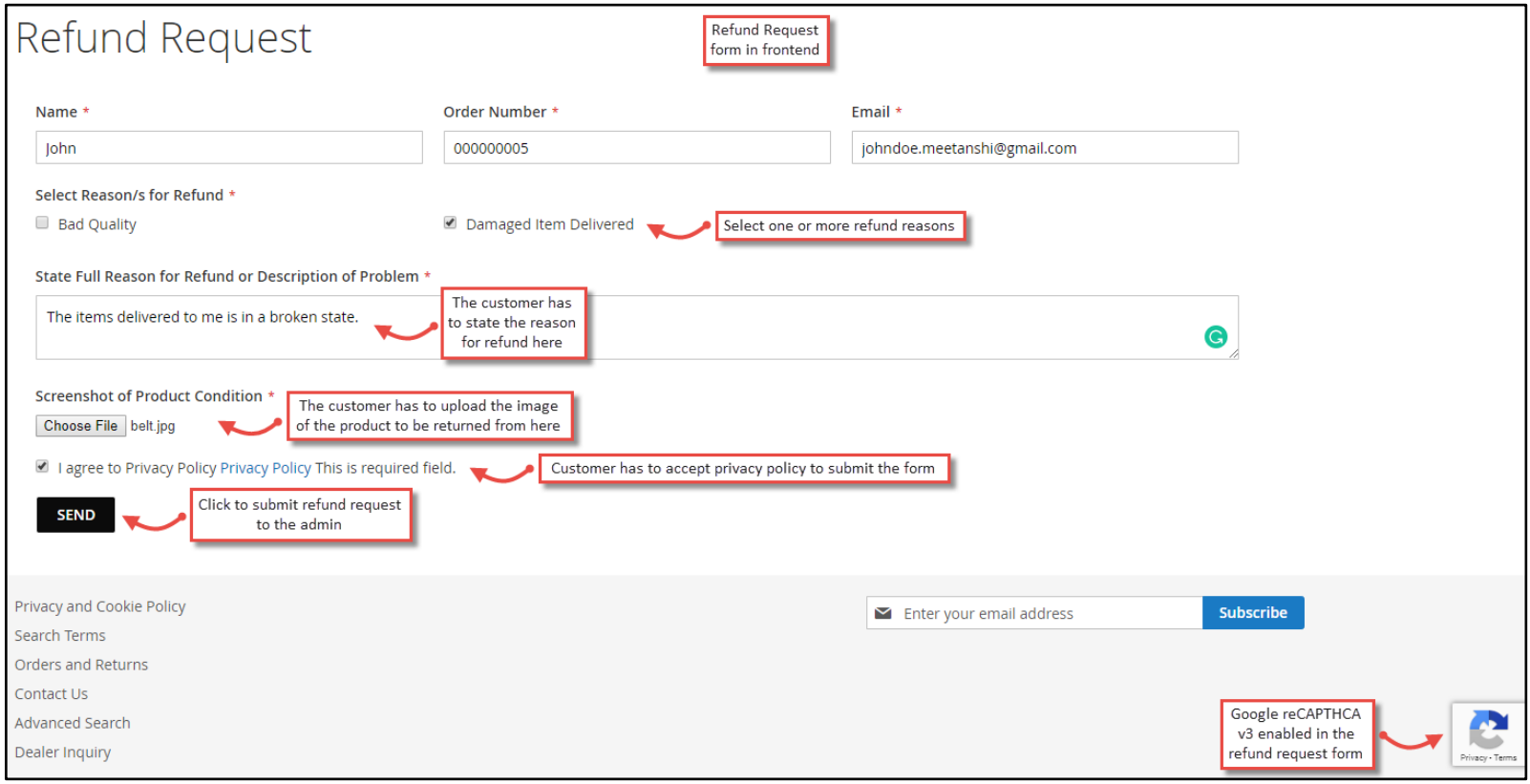
- **Add Reason**
  To add a new reason for refund, admin has to click "**Add New Reason**" button as shown, input the reason title and activate it.

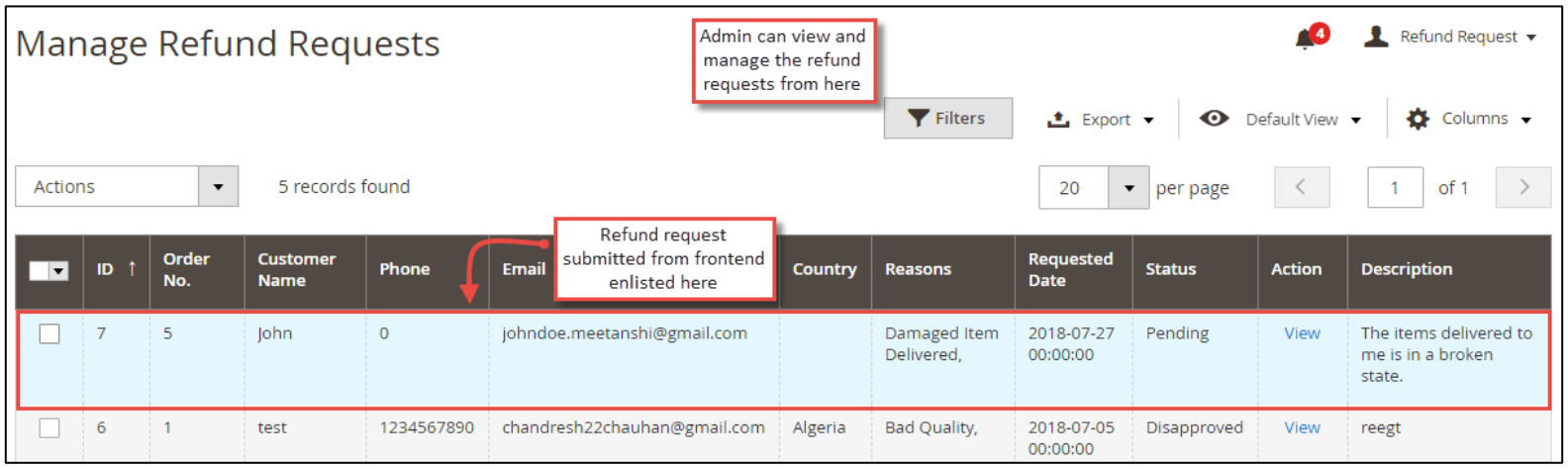
7. Refund Request Form in Frontend

Once the settings are configured, the Refund Request form URL is added to the top link section. On click of the URL, the Refund Request form is enabled for customers to fill up details and submit refund request. Also, Google reCAPTCHA v3 is enabled to restrict the spam inquiry submissions and the privacy policy check box is enabled to comply with EU's GDPR.

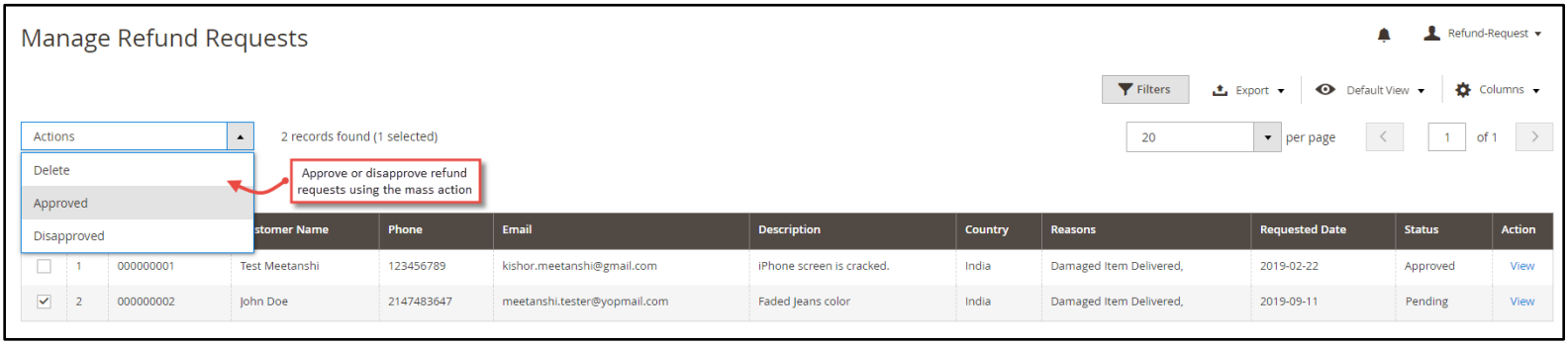


8. Manage Refund Requests

Immediately after the refund request is submitted by customers, the details of it is saved in the backend under **Refund Request → Manage Refund Requests**. Admin can manage all the requests from here.



- The admin can approve or disapprove the customers' refund requests using the mass action from the dropdown.



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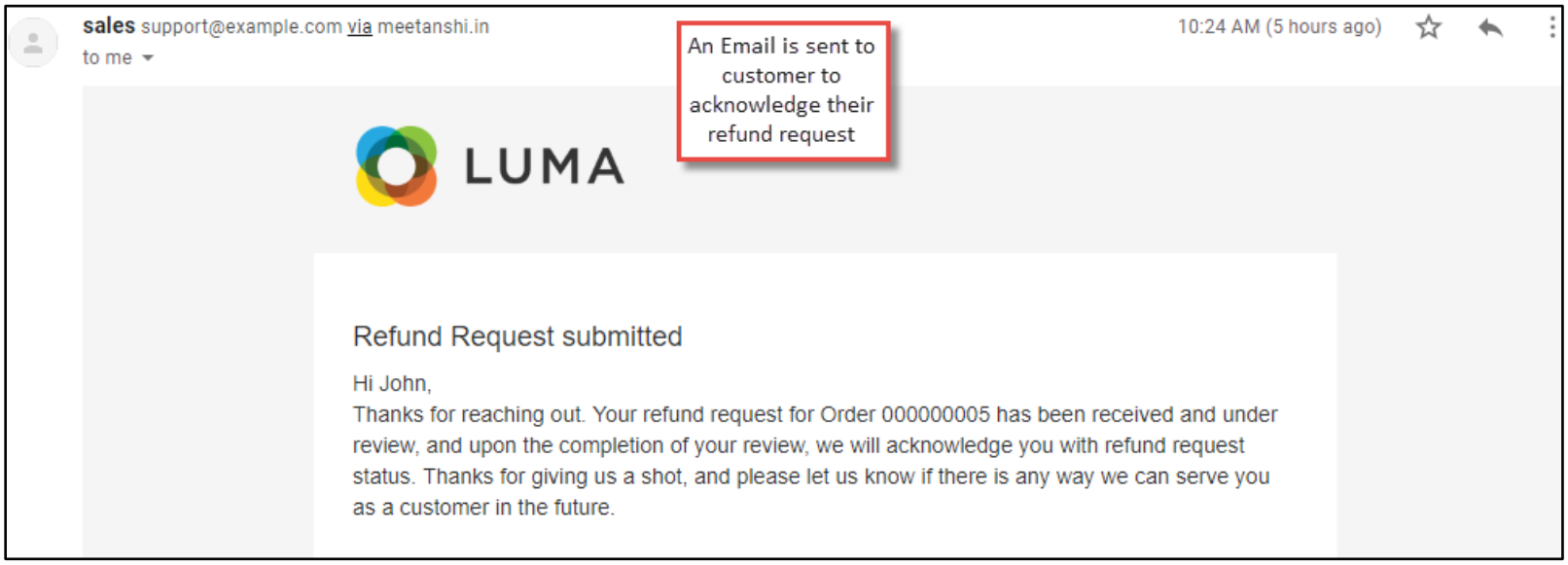
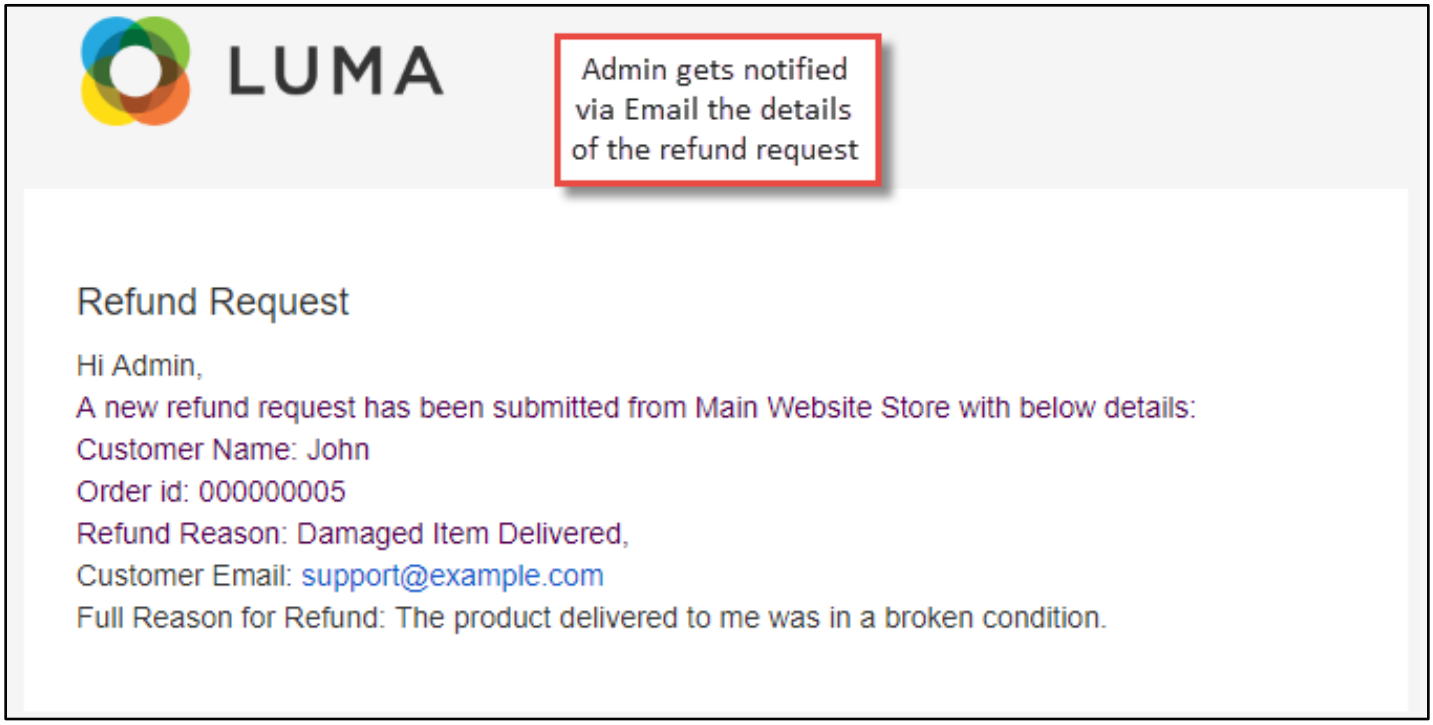
9. Notification Emails

- **Refund Request Submission Success Email to Customers**
  Once customers submit refund requests from the frontend, they get acknowledgement Email to notify about successful refund request submission.



- **New Refund Request Email to Admin**
  Immediately after a new refund request is submitted by a customer, the admin get Email notification having the details of the refund request.



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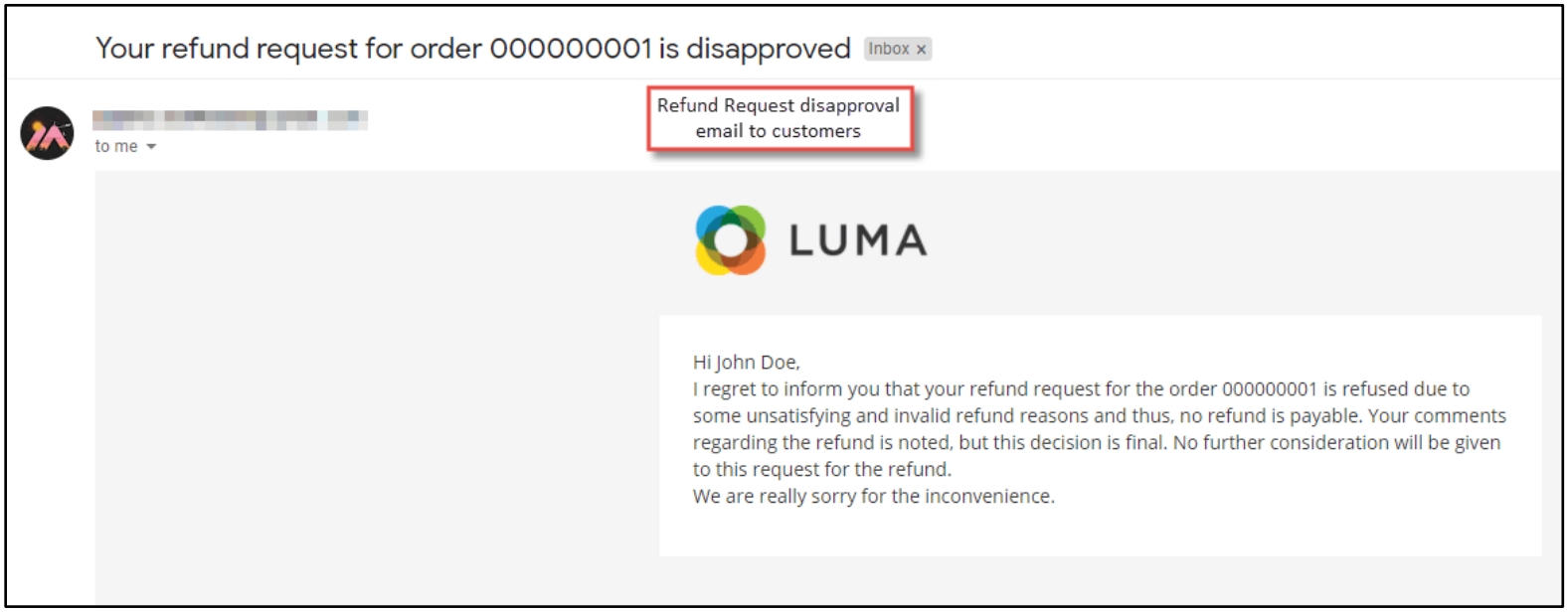
- **Refund Request Approval Email to the Customers**
  Immediately after the admin approves a customer's refund request, the customer gets notified by an Email for the refund request approval.

- **Refund Request Disapproval Email to the Customers**
  Immediately after the admin disapproves a customer's refund request, the customer gets notified for the refund request disapproval.



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