



WebPanda

Easy Returns User Manual

Contents

- [Manage RMA Settings](#)
- [Manage Statuses](#)
- [Customize Email Templates](#)
- [Processing RMA](#)

RMA Settings

This section describes the settings that you can use for configuring your Return Merchandise Authorization process. To configure the extension go to **Sales** → **WebPanda RMA** → **RMA Configuration**.

General Settings

Option	Description
Allow guests to request RMA	If enabled, this option will allow guest order returns.
Allow RMA Request Status to be set from dropdown by admin	If enabled, this option will change the Return Request admin edit form and add a Status Dropdown which allows the admin to edit the request status to any custom created RMA Status.
Return Period	Specify the number of days, after the order was completed, in which the client is able to request a return.
Allowed order statuses for RMA	Specify the statuses the order has to be in so that Return Request would be allowed for it.
Max Attachment Size (Mb)	Customers will not be able to upload files with a size over this limit.
Return Instructions Block	A CMS Block containing the Return Instructions section text

from the Return Request page on the storefront.

"Confirm Shipping" popup text

Customize the pop-up alert message that appears before the user certifies he sent the package back to you. Make sure he understood the instructions properly and the shipment is according to your standards!

Contact Settings

Option	Description
RMA Department Email	Specify the email address from which all communication emails will be sent to a customer.
RMA Department Name	Specify the sender name from which all communication emails will be sent to a customer.
RMA Department Address	Specify the address the customer will see in the Return Instruction section on the Return Request page.
Notify Customer by Email	Allows you to disable email sending to the customer regarding RMAs. Enabled by default.
Notify Admin by Email	Allows you to disable email sending to the admin regarding RMAs. Enabled by default.

Email Templates Settings

Option	Description
Admin Comment Template	Specify email template sent to customer when admin places a comment.
Customer Comment Template	Specify email template sent to admin when customer places a comment.

Reason for Return Settings

Option	Description
Frontend Label	Label text that will be displayed on the storefront and in the customer emails for “Reason for Return”. Useful for multilanguage stores.
Admin Can Edit On	Select the statuses a Return Request should have so that the Reason for Return value can be updated by the admin.
Customer Can Edit On	Select the statuses a Return Request should have so that the Reason for Return value can be updated by the customer.
Options	Edit the options available for the Reason for Return dropdown. Options can be assigned per store for multilanguage stores. If an option is deleted, the Return Requests that have this option selected will keep the deleted option label.

Item Condition Settings

Option	Description
Frontend Label	Label text that will be displayed on the storefront and in the customer emails for “Item Condition”. Useful for multilanguage stores.
Admin Can Edit On	Select the statuses a Return Request should have so that the Item Condition value can be updated by the admin.
Customer Can Edit On	Select the statuses a Return Request should have so that the Item Condition value can be updated by the customer.
Options	Edit the options available for the Item Condition dropdown. Options can be assigned per store for multilanguage stores. If an option is deleted, the Return Requests that have this option selected will keep the deleted option label.

Resolution Settings

Option	Description
Frontend Label	Label text that will be displayed on the storefront and in the customer emails for “Resolution”. Useful for multilanguage stores.

Admin Can Edit On

Select the statuses a Return Request should have so that the Resolution value can be updated by the admin.

Customer Can Edit On

Select the statuses a Return Request should have so that the Resolution value can be updated by the customer.

Options

Edit the options available for the Resolution dropdown. Options can be assigned per store for multilanguage stores. If an option is deleted, the Return Requests that have this option selected will keep the deleted option label.

Style Settings

Option**Description**

Custom Style

Add your own style to the RMA Interface on storefront. This will affect all RMA pages in the front end area of your website.

Statuses

Each RMA Return Request goes through a set of stages, on which data is gathered and communication with customers is established. Each of these stages corresponds to a **Status**, which is a crucial part of RMA.

By default the RMA Return Requests can have the following statuses:

- **Pending Approval** - after RMA return request is created it gets this status and it is awaiting admin review.
- **Approved** - RMA return request is approved. The customer can print the Packing Slip and ship their items.
- **Canceled** - RMA return request was cancelled by the customer or by the admin.
- **Package Sent** - customer has confirmed sending the RMA items to the store.
- **Package Received** - admin has confirmed that the RMA items were received.
- **Issued Refund** - if the RMA request has the Resolution "Refund" the admin will create a Credit Memo and set the RMA return request to this status.
- **Complete** - RMA return request is completed.

Add Status

ID	Name	Is Core Status	Send Email to Customer	Send Email to Admin	Add Message to RMA	Action
1	Pending Approval	Yes	No	Yes	Yes	Edit
2	Approved	Yes	Yes	No	Yes	Edit
3	Canceled	Yes	Yes	Yes	Yes	Edit
4	Package Sent	Yes	No	Yes	Yes	Edit
5	Package Received	Yes	Yes	No	Yes	Edit
6	Issued Refund	Yes	Yes	No	Yes	Edit
7	Complete	Yes	Yes	No	Yes	Edit

How to create a new status

Go to **Sales** → **WebPanda RMA** → **RMA Statuses** and press **Add Status**.

Add Status

Search, Notifications, User: admin

← Back Save and Continue Edit Save

STATUS DETAILS

- General information ✎
- Messages

General

Status Name *

Status Color *

Return Progress Step *
 Select the RMA Progress bar step this status should be assigned to.

Email to Customer
 Send Email to Customer when the RMA Request gets to this status.

Storeview 1-2 *

Default Store View *

Email to Admin
 Send Email to Admin when the RMA Request gets to this status.

Storeview 1-2 *

Default Store View *

Frontend Label

Storeview 1-2 *

Default Store View *

STATUS DETAILS

General Information

Messages

Messages

Adds Message to RMA



Add Message to RMA Request Thread when it gets to this status.

Storeview 1-2 *

Default Store View *

General Information

- **Status Name** - specify a name for the new status.
- **Status Color** - specify a color for the new status.
- **Return Progress Step** - the RMA return request progress bar has 5 steps. You need to specify to which step of the progress bar the new status will be assigned to so that the extension will know how to set the progress bar when the RMA request has this status.
- **Email to Customer** - if enabled, when the RMA return request reaches this status an email will be sent to the customer. Then you will need to select an email template for each store in your website.
- **Email to Admin** - if enabled, when the RMA return request reaches this status an email will be sent to the admin. Then you will need to select an email template for each store in your website.
- **Frontend Label** - specify a frontend label for each store of your website.

Messages

- **Add Message to RMA** - if enabled, when the RMA return request reaches this status a message will be added automatically to the RMA return request message queue. Then you will need to set a text message for each store in your website.

Customize Email Templates

To change the email template of RMA you need to do following steps:

- Go to **Marketing** → **Email Templates**.
- Press button **Add New Template**.

- Select the template in the dropdown list that you would like to customize. The current extension templates are placed at the **WebPanda_Rma** header.
- Press button **Load Template**.
- Enter new **Template Name**.
- Change **Template Subject** and **Template Content** as you need, and save template.
- You can insert additional variables(default magento email template variables and custom Webpanda Easy Rma email template variables). To add a variable click button **Insert Variable**.
- Go to **Sales** → **WebPanda RMA** → **RMA Configuration** → **Email Templates**. Select your new template in the dropdown list of necessary notifications and press **Save Config**.

How to use variables in Email notification

Email templates can contain special variables, which allows a high level of customization.

This extension supports standard **Magento Email Template Variables**, such as `{{var customer}}`, and supports function calling, like `{{var store.getName()}}`, and also adds a set of its **own variables**.

The custom **Email Template Variables** available from the extension are:

- `{{var rma_id}}` - RMA number
- `{{var status}}` - RMA Status
- `{{var created_at}}` - RMA create date
- `{{var customer_name}}` - RMA customer name
- `{{var customer_email}}` - RMA customer email
- `{{var url}}` - RMA storefront URL
- `{{var admin_url}}` - RMA admin URL
- `{{var order_id}}` - RMA original Order ID
- `{{var order_url}}` - RMA original Order URL
- `{{var store_name}}` - Name of the store on which the RMA was created
- `{{var rma_department_address}}` - RMA Department Address
- `{{var comment_text}}` - Text from the submitted comment

Processing RMA

If customer would like to make a refund or exchange for ordered item(s) he will be able to use this form:

- My Account
- My Orders
- My Downloadable Products
- My Wish List
- Address Book
- Account Information
- My Product Reviews
- Newsletter Subscriptions
- My Returns**

New Return

Please select an order

#000000004 from Jan 5, 2020

Apply

Request Information:

Order #000000004
 Customer Name Veronica Costello
 Email Address roni_cost@example.com
 Order Date Jan 5, 2020, 1:59:50 PM

Contact Information:

Veronica Costello
 6146 Honey Bluff Parkway
 Calder, Michigan 49628-7978
 United States
 (555) 229-3326

Compare Products

You have no items to compare.

Recently Ordered

- Olivia 1/4 Zip Light Jacket
- Juno Jacket
- Bardot Capri

Add to Cart

View All

My Wish List

You have no items in your wish list.



Juno Jacket-S-Green
SKU: WJ06-S-Green

Return Qty / 4

Reason for Return *

Item Condition *

Resolution *

This product already has return requests:
#000000005



Olivia 1/4 Zip Light Jacket-M-Black
SKU: WJ12-M-Black



Bardot Capri-29-Red
SKU: WP08-29-Red

Add message

Choose Files No file chosen

A picture is worth a thousand words!. Attach them here in the following formats: jpg, jpeg, png, pdf, doc, xls

Submit Request

Once the request is created an email will be sent to the **RMA Department Email**(if configured to send emails). Then the admin will be able to click on the **RMA Return Request link** from the email and access the **RMA Return Request edit page**.

General Information

Here the admin will be able to see details regarding the RMA Return Request like: Status, Order, Purchased from Store, Customer Name and Last update time.

He will also be able to communicate with the customer and see a message queue. Here the admin will also be able to upload files as attachments to the message.

By default the admin can only edit the status of the Return Request thru the main buttons of the edit form like in the example below.

Return #000000005

← Back Cancel Save and Continue Edit Save **Confirm Package Receiving**

RETURN INFORMATION

General Information

Products

Customer Information

Current Status **Approved**

Order #000000004 (Jan 5, 2020, 1:59:50 PM)

Purchased From Main Website
Main Website Store
Default Store View

Customer [Veronica Costello](#)

Last Update Jan 5, 2020 2:27:37 PM

Add reply for customer

Choose Files No file chosen

Notify Customer by Email

By default the admin can only edit the status of the Return Request thru the main Buttons of the edit form

If the extension is configured to allow the admin to edit the status of the Return Request manually and set it to any value available the form will look like the one below.

Return #000000005

← Back Cancel Save and Continue Edit Save **Confirm Package Receiving**

RETURN INFORMATION

General Information

Products

Customer Information

Status **Approved**

Order #000000004 (Jan 5, 2020, 1:59:50 PM)

Purchased From Main Website
Main Website Store
Default Store View

Customer [Veronica Costello](#)

Last Update Jan 5, 2020 2:27:37 PM

Add reply for customer

Choose Files No file chosen

The Extension can be configured to allow the admin to edit the status of the Return Request manually and set it to any value available. This is usefull for websites that need to create custom RMA Statures

Products

Here the admin is able to see the products for which the customer has requested refund or exchange. The admin is also able to edit the Reason, Item Condition and Resolution for each product, depending on the status of the RMA request and the configurations(the config field **Admin Can Edit On**).

← Back Cancel Save and Continue Edit Save **Approve**

RETURN INFORMATION

General Information

Products

Customer Information

1 records found

20 per page 1 of 1

Product Name	SKU	Qty to Return	Reason	Item Condition	Resolution
Neve Studio Dance Jacket-L-Orange	WJ11-L-Orange	1	Wrong color	Not opened	Repair

Add reply for customer

 No file chosen

 Notify Customer by Email
Post Reply

Customer Information

Here the admin will be able to see details regarding the customer the has requested the RMA.

Messages History

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Return #000000005

← Back Cancel Save and Continue Edit Save **Confirm Package Receiving**

Add reply for customer

No file chosen

Notify Customer by Email

Post Reply

John Smith (Administrator), Jan 5, 2020, 2:28:24 PM

We will have a replacement for you in no time

Automatic Message (Administrator, John Smith), Jan 5, 2020, 2:27:39 PM

The request has been approved.

Automatic Message (Administrator, John Smith), Jan 5, 2020, 2:27:27 PM

The request is pending approval.

Veronica Costello (Customer), Jan 5, 2020, 2:23:41 PM

Something is off with this jacket

Approve

Guest Returns

Guest customers can request returns for their order. They need to provide the email the order was placed with and the order increment id.

Request Return

Registered Customers

Did you place order as registered customer? Sign in with your email address to proceed.

Email: *

Password: *

Login

[Forgot Your Password?](#)

Guest Order

If you have placed order as guest, please enter Order Number and Email used for the order.

Order Number: *

Order Email: *

Next